White Paper

How to Plan & Deliver Oracle E-Business Suite Training using UPK

Authored by Martin Dvorak

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June 2011

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ABOUT THE AUTHOR

Martin Dvorak is an Oracle Applications Consultant, Speaker and Author. He has spent the last 17 years implementing a diverse range of software solutions for organisations within a variety of industries in Europe and the USA. He has also presented papers at numerous national and international conferences and contributes to leading journals around the globe. Martin Dvorak was ranked 3rd as IT Freelancer of the Year in 2006. Martin Dvorak speaks fluent English, German, Czech and French.

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INTRODUCTION

The purpose of this white paper is to illustrate how to plan and deliver training for the Oracle E-Business Suite Release 12 using the Oracle User Productivity Kit tool (UPK 3.6.1). UPK can be used for any Oracle Business applications (EBS, PFST, JDE, Siebel, etc) and not necessarily for the Oracle E-Business Suite as in this white paper.

The white paper is for any parties involved in the program office of a project, project managers, training coordinators and functional consultants.

Organizations implementing Oracle E-Business Suite Applications or any other ERP system such as SAP often underestimate the importance of training. Training is one of the critical success factors of a successfully ERP implementation. Using a tool such as UPK makes it easier and accelerates user adoption.
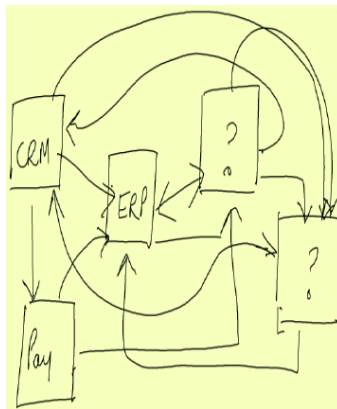

Fig 1: Training is often neglected when it comes to planning for large and complex projects.

Companies whose Oracle Applications initiatives failed point to lack of end-user training as the key critical missing element. Though enthusiasm is high when the project begins and the dollars flow, do not let the weariness of a long implementation overshadow the need for local training. If this training is held in the local language of the country implemented, the better. The benefits will outweigh the investment.

The Oracle User Productivity Kit:

- Provides end to end support throughout the project lifecycle.

- Creates documentation, simulations, and live-application performance support.

- Measures end user competency to ensure organizational readiness.

- Accelerates time to deployment with pre-built content for Oracle applications.

- Supports Oracle, SAP, and Microsoft as well as all other enterprise applications.

Oracle's User Productivity Kit is an excellent tool for customized training as well as implementation and upgrade project documentation development. While the use of UPK greatly increases the efficiency of actual content recording and editing, many other tasks need to be performed to create an effective content library that can be used in all aspects of a training program:

Define – this is the activity of mapping the business processes and scenarios to use for training. This activity takes the longest amount of time and happens completely outside of UPK. For example, you can use test scenarios from CRP, UAT or SIT to accelerate this phase.

Alternatively you can use a two phase approach by having an introduction on the processes using presentations and on hand demos (i.e. using the Vision instance) and then having as a second phase the UPK training material developed.

Record – this is the actual recording process within UPK.

Update – while UPK creates some standard text, there is a lot of information which needs to be included in a topic such as customized text, first page introductions to a topic, last page and content summary, scenarios, and organizational policy information.

Test – this task relates to the review and testing process for developed content to ensure that the content is accurate and instructionally sound.

Review results with various stakeholders – This task involves stakeholders within the organization to review and update the content from an organizational perspective including how it will be used.

Roll out – plan the delivery of the training. This includes train the trainer sessions, preparations and logistics, locations, order of Oracle EBS modules, etc.

Organizations can also use UPK early during an implementation or upgrade project to perform the map / gap analysis where they get educated how the new Oracle Release 12 works and discuss changes needed to get the application to enable their specific business process.

UPK is also useful to validate transactions and business process flows with extended project team members that may not be involved in the core project.

The benefits of using a training and productivity tool such as UPK are as followed:

Reduced Time

Time is a critical factor in any training development effort. Organizations want content developed as quickly as possible to begin realizing benefits. Building an entire library of content from scratch will take several weeks or months. With a proper and professional approach as highlighted in this white paper, organizations can start to utilize and gain benefits earlier.

Reduced Costs

There are several tasks outside of recording content in UPK that need to be completed to create a library of content. Storyboarding the topics, standardizing processes, adding narrative information, and adding policy and procedure information all need to happen in order for content to be recorded within UPK.

Increased time means increase costs. Organizations that use the approach as highlighted in this white paper can save time and costs.

Better Results

Organizations also face increasing demands on their ability to be compliant with leading business practices either because of Governance, Risk and Control (GRC), Standard Operating Procedures (SOP's) or other internal auditing initiatives. Building content from scratch only documents current processes. Liaise with other parties in the project as described in this white paper, results will be higher quality and more valuable.

This white paper puts the above described aspects into phases and shows your organization how to approach the training. We will cover optional and required phases so that your organization can choose what to implement. The phases are logically and chronologically organized.

EXECUTIVE SUMMARY

Whether you are implementing the Oracle E-Business Suite on a green field or undergo an upgrade to Release 12, one of the critical success factors achieving a superior ownership experience is to ensure that your employees know how to use ERP applications effectively to perform their daily jobs.

Lack of accurate and consistent process, procedure, and training documentation can detract from an organization's ability to successfully implement, use, and maintain its business applications.

This whitepaper describes how to plan and deliver successfully training using several phases and the UPK tool.

Phase I (Optional): Development of the Training Material for the first introduction of the new ERP system. This includes the overview of the new processes based on the Future Business Model. For organizations migrating to Release 12, it can include the changed and new Release 12 processes such as focusing on the delta between Release 11i and Release 12.

Phase II (Optional): In class training for the key users and testers based on the future business process model.

Phase III (Required): Development of the training alignment based on Oracle's User Productivity Kit (UPK). Preparation of the user training environment and adjustment of the Application Set up such as adding training specific data and processes on the training environment.

Phase IV (Required): Development of the user training materials. This is the actual recording and should be executed with different statuses (record, review, update, etc.). It provides the content and software tools to capture and play back the exact steps a user would use to enter data in a formal business application. System transaction documentation, job aids, user acceptance test scripts, instructor led and online training, and online performance support are valuable content pieces that can all be created from one recording. As part of online training, users can use the simulation playback to be trained and tested on their understanding of how to complete activities that are part of their daily job. The development does not only include the recordings but also business reviews, updates and script enhancements such as adding web pages, glossaries, explanation frames, concepts, scenarios and ensures the quality standard.

Phase V: Consists of Train the Trainer sessions **(Optional)** and the actual End User Training **(Required)**. A proper training concept is a prerequisite of a successfully training roll out. During the training, you should constantly improve the training material by adding additional requirements and changes which are coming back from the key users and the global process leads.

ROI: The white paper also covers a UPK return on investment sample which helps organizations a better estimation of their costs and benefits when planning the training.

To sum up, after reading this white paper you should know:

- How to cut the total cost of training development (i.e. by up to 77%).

- How to increase your training efficiency.

- How to improve your training approach and stop going through the same mistakes as others.

- How to constantly improve know how of your employees (i.e. by up to 50%).

WHAT IS UPK?

The User Productivity Kit is a complete instructional design development tool for all Oracle (and other software) business applications. Organizations can quickly create the critical system transaction training and support materials needed to drive project team and user productivity throughout the lifecycle of the software. A repository of system transaction content is also provided for many of the applications. With the UPK Developer tool, organizations can create system transaction documentation, user acceptance test scripts, comprehensive instructor led training materials, web-based training materials, and provide post go live performance support.

Fig 2: UPK produces single recording with multiple outputs for use throughout the entire project lifecycle.

In a nutshell, the User Productivity Kit is a:

- Single Source of Content Development
- Standardized Documentation Style
- Online and Paper Based Documentation
- On Demand Computer Based Training
- Business Process Documents
- User Acceptance Test Scripts
- Job Aids, etc.

The advantage of using a tool such as UPK is that it is a comprehensive, cost-effective, customizable solution that helps organizations quickly create the critical documentation, training, and support materials needed to drive project team and user productivity throughout the lifecycle of the software implementing (i.e. the Oracle E-Business Suite). UPK Developer enables you to record once and publish to multiple formats; it also makes the process of updating recordings simple and consistent. Updates are quickly made through the development tool and then those changes are applied across all published outputs.

UPK is one tool with one development effort. It was designed to be used by nontechnical people who have subject matter expertise in the different business processes. You don't need programming skills to use the tool. The people in your organization, such as trainers, subject matter experts, project managers, and/or functional experts, can easily use this tool to create multiple outputs to support your training needs.

WHY IS TRAINING IMPORTANT?

According to Gartner, untrained users require 3 to 6 times more support than trained users which leads into excessive support costs. Untrained users take up to 22.5 hours to achieve the same skill level that it takes a trained employee 5 hour to achieve which impacts productivity.

And according to Meta Group, from the 437 companies that responded to the survey, 76% face user competency challenges related to their ERP system.
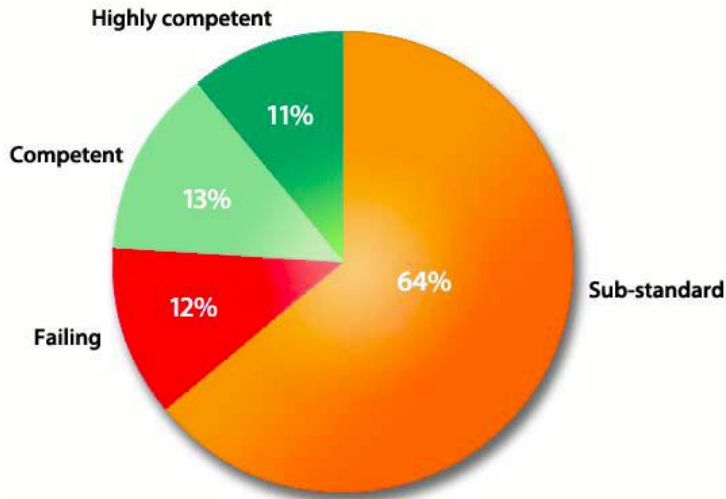
Fig 3: How competent are your end users? Source: ERP Competency Multi-Client Study, Meta Group 2003

This means that 64% of the end users have a sufficient understanding of the software but are not gaining the full benefit of its functionality and 12% of the end users are struggling to make use of the software. 13% of the end users fully understand the software and are able to gain full benefit of its functionality and 11% of the end users have the ability to perform their jobs more effectively due to competency in using the application and knowledge of how it supports their processes.

Phase I: Development of the Training Material for the first introduction

The first introduction is an optional phase since it is not directly related to UPK. When you plan training and you need to educate not only on the tool but also on the processes then you need to consider this phase. This includes the overview of the new processes based on the Future Business Model. For organizations migrating to Release 12, it can include the changed and new Release 12 processes such as focusing on the delta between Release 11i and Release 12.

Start with the Processes

When implementing a new ERP system, processes are often the key challenge in implementations and the most impacted area of change. Apply metrics to improvements in these processes, not the system. Start with the processes in the implementation and highlight the country specific parts. Do not think of Oracle Application as a software application – think of it as a business initiative whose goal is to streamline, redefine or otherwise modify key business processes. Identify gaps between standard Oracle processes and country specific processes. Ensure that gaps can be met with an accepted manual workaround, avoid extensive customizations.

When it comes to training, in most projects, the future processes have already been defined and are available as the starting point. If your organization is using Oracle's Application Implementation Methodology (AIM) or Oracle's Unified Method (OUM) you should take these deliverables as the source for your Phase I training development.

AIM firstly is a methodology showing what tasks are required, what order they should be completed in, and what resources are required. Secondly, AIM provides deliverable templates for all the tasks that require them.
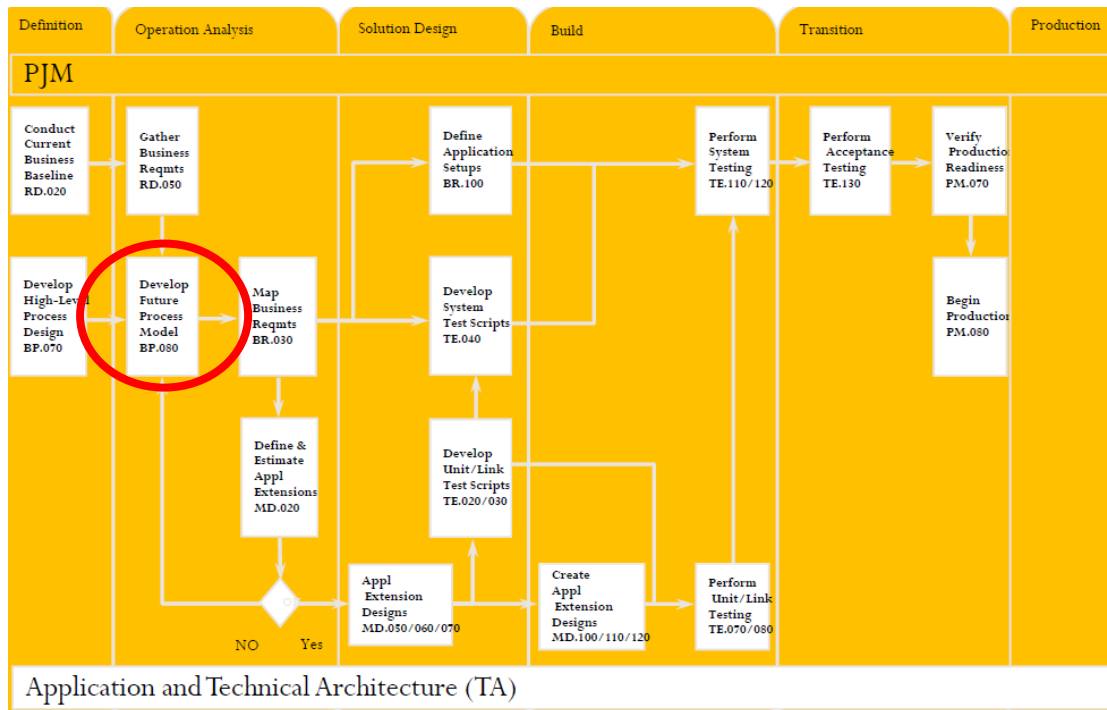

Fig 4: Oracle Recommended Implementation Activities

The process documents which can be used are in the following three areas:

1. Business Process Architecture, BP: Business Process Architecture addresses understanding of the organization's business processes and aligns them with the business requirements and applications to be implemented, produce detailed process descriptions embodied in the Future Process Model. Business Process Architecture objective is to provide environment for business process analysis, developments and modifications.

2. Business Requirements Definition, RD: Business Requirements Definition defines the business needs that must be met by the implementation project. You document business processes by identifying business events and describing the steps that respond to these events

3. Business Requirements Mapping, BR: Business Requirements Mapping compares the business requirements to standard application software functionality and identifies gaps that must be addressed to fully meet business needs. As gaps between requirements and functionality emerge, they are resolved by documenting workarounds, alternative solutions, application extensions, or by changing the underlying business process

The ones I recommended are in the Operational Analysis and are:

- BP.080: Future Process Model. Similar deliverable is available in OUM since AIM is retired.

- RD.030: Develop Future Process Model (as the predecessor of BP.080 in the previous AIM versions) now called Process and Mapping Summary. Similar deliverable is also available in OUM since AIM is retired.

The BP.080 is ideally done during the CRP 1 phase.

RD.030   Process and Mapping Summary

The RD.030 captures the future business flows and can be used for developing the content for a Phase I training. In the older AIM version, the RD.030 was the Future Process Model where you can open the embedded Vision process flows and change them.

The RD.030 consists of the event catalog, process listing and descriptions and process flow diagrams. Optionally it may include process step catalogs.
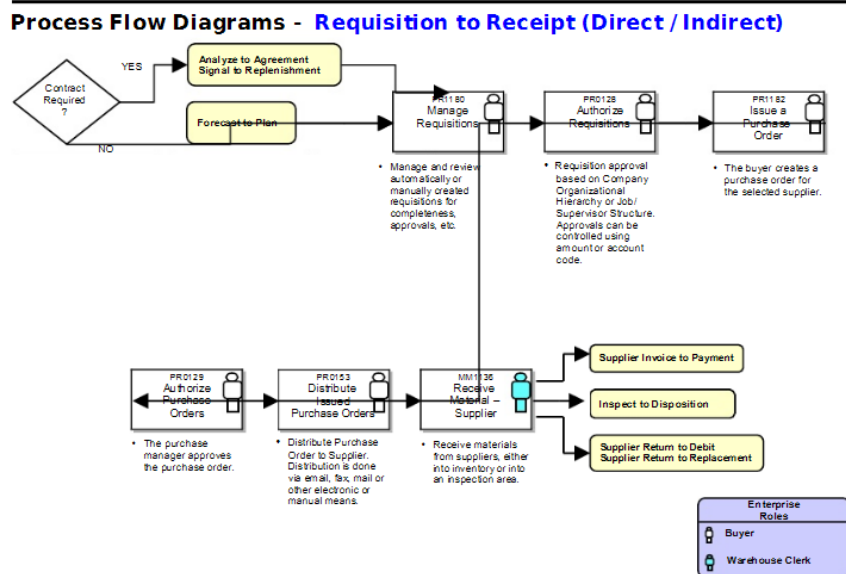

Fig 5: Sample RD.030 Process and Mapping Summary

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BP.080 Future Process Model

I recommend the BP080 – Future Business Model as the starting point for developing the content for a Phase I training.

Process Listing and Process Descriptions - Requisition to Receipt (Direct / Indirect)

	Direct/ Indirect	Process Title	Description of Process	Ref. to customer process	Process Owner	Notes
PR1180	Only Direct	Manage Requisitions	Manage and review automatically or manually created requisitions for completeness, approvals, etc.			MRP is not currently used. I.e. no automatic requisitions at Finland for raw materials. Purchasing is responsible of raw material inventory levels. PO's are created directly. No manually created requisitions at the moment.
PR0128	Only Direct	Authorize Requisitions	Requisition approval based on Company Organizational Hierarchy or Job / Supervisor Structure. Approvals can be controlled using amount or account code.			No requisitions at the moment. No authorization hierarchy in use in Finland.
PR1182	Both	Issue A Purchase Order	The buyer creates a purchase order for the selected supplier.			Buyer creates PO's. For indirect purchases, buyer receives the information from end users outside the system.
PR0129	Both	Authorize Purchase Orders	The purchase manager approves the purchase order.			No authorization hierarchy in use in Finland. Technically the buyer have rights to approve almost anything. For indirect purchases the manual requisitions (outside of the system) are already approved.
PR0153	Both	Distribute Issued Purchase Orders	Distribute Purchase Order to Supplier. Distribution is done via email, fax, mail or other electronic or manual means.			PO's are sent by fax but also always as regular post. There are no direct (e.g. EDI) connections to any supplier. Current PO languages are FIN and ENG. Russian language is needed. PO language depends on supplier. Russian document layout is needed.
MM1136	Both	Receive Material	This procedure covers receiving			Warehouse Clerks does the

Fig 6: Sample of BP.080 Future Process Model

The purpose of the BP.080 is to define the future business model in the form of integrated process flows built on the business processes supported by the new applications. The deliverable for this task is the Future Process Model. It includes process flow diagrams of the events and business processes that the applications and the associated functions of the business area will support. You basically need to describe the events to which the business delivers the input and the output (respond). You will also list and write a summary for each process and describe the event to which the process responds to.

As the input you have the RD.020 (Current Business Baseline) which provides you the information from the interviews and workshops with key users and management.

The BP.080 structures the steps that make up each process, their sequence, any conditions that determine alternative execution paths, and the resource responsible for each step.

You should include the detailed process flow diagrams for the future processes in the BP.080 whereas the high level processes can be captured in the RD.030.

Develop the Training Material

By documenting the future processes, you need to ensure that the end users have understood these and will adapt them in the new system.

The first introduction is a mixture of presentation of the new process and functionality and a demo in an Oracle Vision or CRP1 environment.

The following samples illustrate the Auto Create Purchase Order Process from a process and demo perspective.
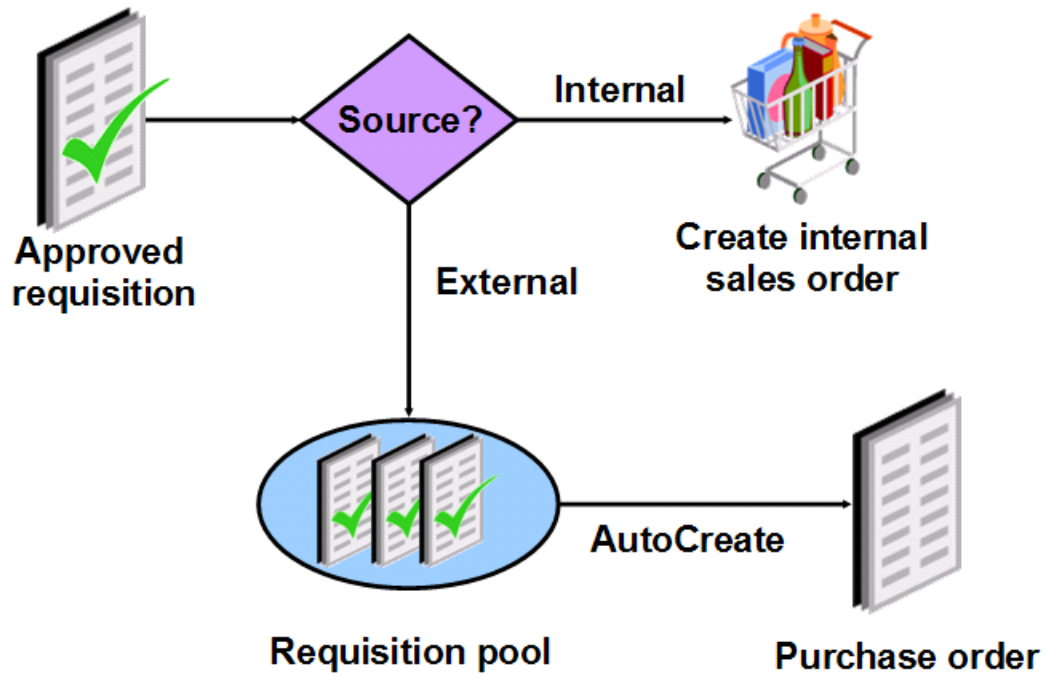
Fig 7: Auto Create Purchase Order future process illustration

Autocreation is the functionality by which Buyers can quickly create standard purchase orders, planned purchase orders, blanket releases, RFQs, and Oracle Sourcing negotiations from any available standard (not internal) purchase requisition lines
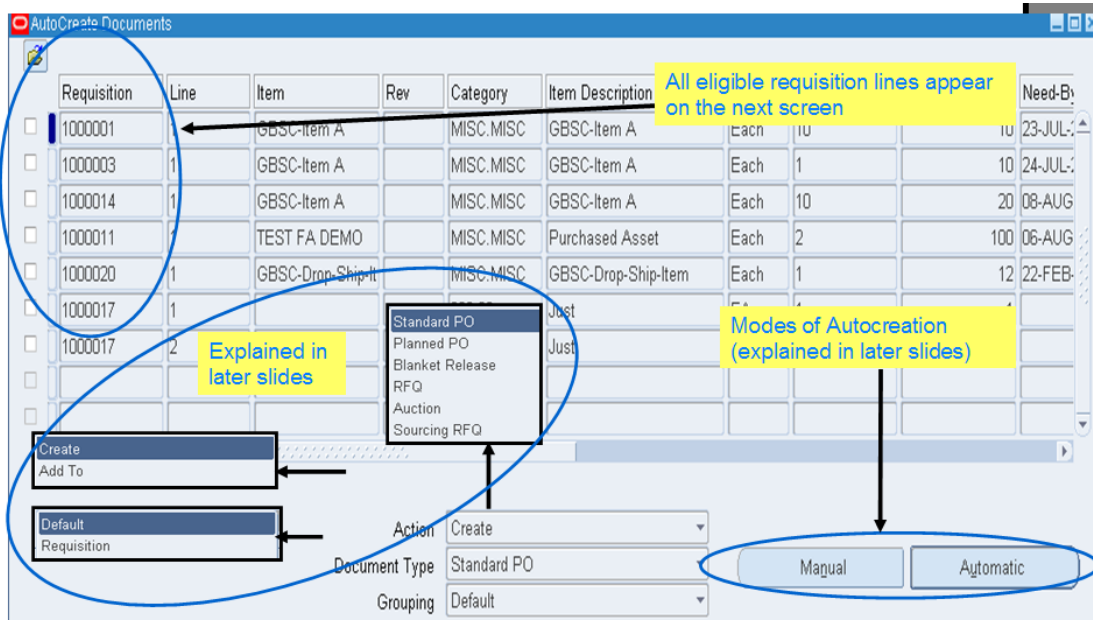

Fig 8: Auto Create Purchase Order demo in Vision or CRP1 illustration

Other considerations in this Phase:

- Review existing AIM / OUM Deliverables (Training Process Phase I)

- Agree on Scope, Objective Approach (can be TR.010 or combination of TR Deliverables)

- Format / Expectations / objectives Phase I

- Agree on Train the Trainer approach (YES / NO)

- Oracle Standard Processes vs. Client Processes (Map / Gap)

- Status of client's BP.080 future business process flows. Are they signed off?

- Agree to use Test Scripts from CRP, SIT or UAT?

- Use other deliverables from prerequisites (RD.020, BR.100, etc.)

- Alternative: Oracle Business Flows – Accelerator (i.e. Supplier Invoice to Payment Flow Model) or from Special Edition

- R12 New Features / R12 Migration Considerations

Phase II: In class training future business process

This phase delivers what has been defined in Phase I. The Phase II in class training is for the key users and testers based on the future business process model.

Ideally, your participants are the future trainers which you are going to train during the train the trainer sessions. This is described in Phase V.

The introduction (Phase I) should be developed within 2-6 weeks, depending on the scope and volume. Avoid presenting hundreds of Power Point Slides to the audience, they will not be able to adopt such a large training material. Rather do a mixture between presentation and a demo in Oracle, i.e. in the Vision instance or a CRP1 environment.

In order to set the expectations with your client, you need to define and agree on the ground rules:

- Parking lot: If in the training sessions a discussion starts to get out of control or impacts the schedule, the trainer puts the topic on a parking lot and will obtain the resolution or answer from the management.

- No mobile phones / use laptops for note taking, not reading email during the training.

- Interactive session.

- Training will not be a Release 11i and Release 12 delta training.

- Show samples and key processes in Visio or CRP1 instance. Hands on for the end users will be in Phase II.

- Level of knowledge of the participants might differ.

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If you use an environment from the customer, i.e. CRP1 or so, you need to ensure that it is possible to demo the process in the environment. For example, if approval groups or employees have not been set up you cannot demo the PO auto creation process.

The Phase II in class training should take between half and a full day per module.

By documenting processes, procedures, and training materials, companies can ease business pressures such as implement new or upgrade existing applications, reengineer or improve business practices, train new users, support users in a production environment, increase staff productivity, develop and deploy company standards, codes of conduct, ethical practices, statutory and regulatory policies and comply with regulatory/quality programs (SOX, GRC, Quality, ISO 9000, etc.).

The Phase II is not related to UPK. The Phase II consists of presentations and demo in an Oracle instance.

The critical success factors in this phase are:

**1.	Involve Users Early**
The local users know the current processes and not just the obvious, typical Oracle standard scenarios. They also know all of the work-around for scenarios that happen only once a day, week or month. It is vital, that you get their knowledge and buy in, and the earlier you include them in the development, the more successful you will be.

**2.	Hire Real Package Experts**
Many Oracle Applications projects run into difficulty because the wrong people are allocated from the organization. Finding experts, internal or external, who really understand the ins and outs of Oracle Applications will save time, avoid mistakes, and make the whole process less stressful. For European projects, the consultants must know the different local processes, localizations, legal and statutory requirements, languages and have at least multiple European roll out experience.

**3.	Recruit Real Business Experts**
How can you manage the change effectively? Many organizations underestimate the impact that their European Roll out will have on people, roles, required skills and the organizational structure as a whole. For the Oracle Applications roll out to be successful in Europe, you need people who know how to apply the tool to your business and how to interpret the data that comes out of it.

**4.	Train Users Well**
Members whose Oracle Applications initiatives failed point to lack of end-user training as the key critical missing element. Though enthusiasm is high when the project begins and the dollars flow, do not let the weariness of a long implementation overshadow the need for local training. If this training is held in the local European language of the country implemented, the better. The benefits will outweigh the investment.

Phase III: UPK Scope

This phase consists of development of the training alignment based on Oracle's User Productivity Kit (UPK). It also covers preparation of the user training environment and adjustment of the Application Set up such as adding training specific data and processes on the training environment.

First you need to address the current implementation or upgrade challenges:

- How will I manage change in my organization?

- How can I minimize risk to my company?

- Should I change my business processes or should I customize the application?

In a more detailed approach, you need to understand the current status and the information required for developing the training material.

- What information is available supporting the development of the training? Refer to prerequisites in Training Process.

- What is the current know how of key users?

- What is the current know how of end users?

- What are the roles and responsibilities for the key users?

- What training instances are available and how much are they in sync with Production?

- Review AIM Deliverables (Training Process Phase II)

- Agreed Format: UPK

- Next Steps

Then you need to find out where the organization stands regarding change resistance so that you can set the goals to ensure knowledge sharing and transfer throughout the project's lifecycle.

Specific learning events will occur at certain points in the project lifecycle.
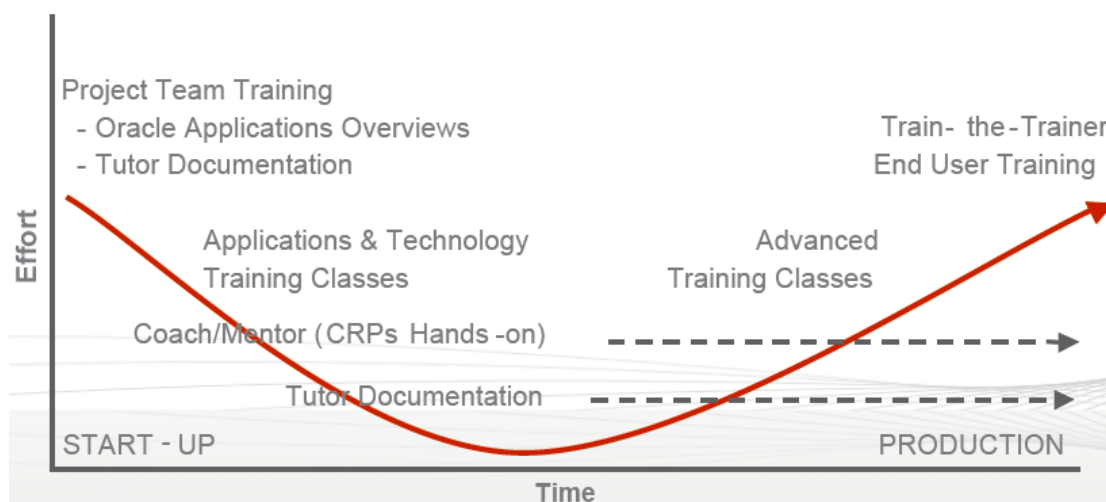

Fig 9: change resistance curve

Change Management Mapping

One of the biggest challenges in organizations today is the management of a changing information environment. E-learning is among the most promising tools in this area as it will enable business users at all organizational levels to keep abreast of developments on their own.

However, if your staff hears "E-Learning" they can get afraid and expecting just getting a tool and some email instructions how to use it.

Therefore, getting the most out of UPK, you need to use UPK amongst other initiatives during your project lifecycle.

Knowing where your organization stands based on the analysis of the change resistance, you need to provide a change management mapping to ensure a holistic approach. This consists of selection of key processes and their impacting categories:

- Selection of Key processes that are expected to have impact on the business
- Impact categories
    - Organization (centralization / decentralization)
    - Process (new R12 process)
    - IT Systems (i.e. data management)
    - People (i.e. employee behaviour)

Using AIM (Application Implementation Method) respectively UOM (Oracle Unified Method)

The UPK Alignment not only determines what will be defined in the UPK but also provides some samples and exercises for the UPK developers. This ensures that the UPK training scripts will be developed within the same quality standard.

The UPK Scope is embedded in different deliverables. An approach using AIM can look as below. Since AIM is retired, most deliverables are also available in OUM.

AIM	Task Name	Description	Phase	Required?
CR.010	Scope, Objectives and Approach	overall project scope	Project Planning	Yes
RD.020	Current Business Baseline	as is process	Definition	Yes
BP.080	Future Business Process Model	to be process / future process model and design	Definition	Yes
BR.020	Business Requirements Mapping Form	Business Requirements	Operations Analysis	Yes
RD.050	Process and Mapping Summary	Business Requirements with mapping	Definition	Optional
BR.080	Mapping Scenario	Map Gap Document	Operations Analysis	Yes
BR.070	Master Report Tracking List	Customized Reports required (legal and business)	Operations Analysis	Yes
BR.100	Process Narrative / Configuration Scripts	Set up Documents	Solution Design	Yes
TE.020	Unit Test Scripts	UAT Test Scripts	Solution Design	Yes
MD.050	Database Extensions Design	Functional Specifications (as outcome from map / gap)	Solution Design	Yes
CR.040	Risk and Issue Log	latest Issues and Resolutions log	Project	Yes

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AIM	Task Name	Description	Phase	Required?
			Control	
CR.060	Change Request Log	latest Change Requests log	Project Control	Yes
TR.010	Education and Training Plan	This task assesses the education and training needs of the project team and user community and plans the delivery of these classes based on common areas of responsibility, interests and skills. It also defines the content of the training (i.e. Level 1 and 2)	Definition	Yes
TR.020	Prepare Project Team Training Environment	During this task, you either install a new application environment or prepare an existing application environment for Project Team Training	Operations Analysis	Optional
TR.030	Support Materials for General Education	This task educates the team on fundamental business concepts. It exposes the project team to new business approaches practiced in industry and also provides each team member with a common understanding of business issues. This task is optional, but it is beneficial when you desire business process changes or improvements	Definition	Optional
TR.040	Support Materials for Applications Overview	This task provides overview that explain key application concepts and provide a general understanding or selected features	Definition	Optional
UPK	UPK strategy	UPK preparation	Training	Yes
TR.050	Project Team Training Preparation	In this task, you plan the resources for project team training	Operations Analysis	Optional
TR.060	Project Team Training Delivery	This task provides technical and functional application training to the immediate project team members. It includes specific training segments for defining and using the applications as well as maintaining the system	Operations Analysis	Optional
TR.070	Develop User Training Materials	This task produces the end user training materials. This will be done with UPK	Solution Design	Yes
TR.080	Prepare User Training Environment	During this task, you either install a new application or prepare an existing application environment for end user training. If you install a new application, you must go through the appropriate pre- and post-installation steps. If you are converting an existing environment for end-user training, you only need to adjust the application setup and	Transition	Optional

AIM	Task Name	Description	Phase	Required?
		add training specific data		
TR.090	Support Materials for User Training	During this task, the project team trains users to use the new system	Transition	Optional

The UPK Scope can be developed before the activity of developing custom test scripts. This is because the UPK Scope focuses more on how and what in UPK will be developed. If the volume of test scripts is known, then you can estimate the workload for the UPK development.

The figure below shows the different phases in an Oracle Release 12 upgrade project.

You develop the UPK scope ideally before or during the Elaboration (volume of test scripts known) or during the Definition phase (volume of test scripts unknown).
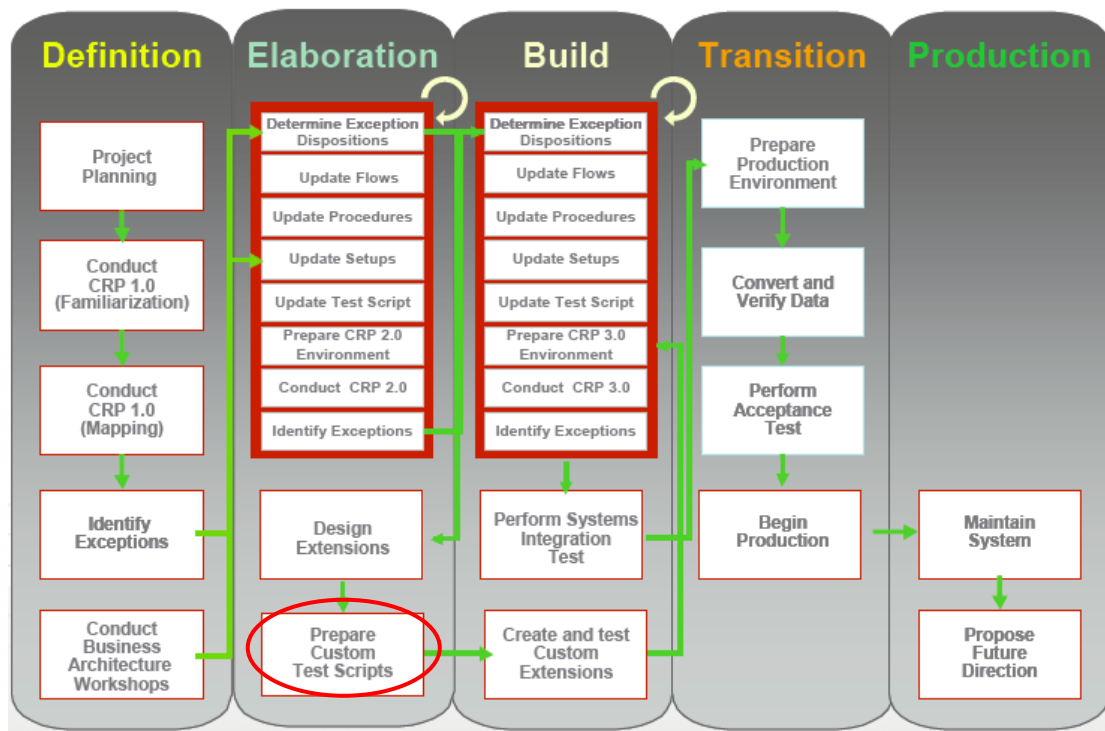

Fig 10: Phases in an Oracle E-Business Suite Release 12 Upgrade Project

UPK Alignment

The UPK Alignment is the scope of your UPK training project and ensures the quality standards of your scripts to develop.

You need to think about end user competency challenges and the input for your training plan and concept.

Question which will occur are:

- How do I address "pre-go-live" training and "post go-live" support?

- What type of users do I have?

- How will I address new-hire training?

- How do I address local and remote users?

- How will I deliver training? Classroom training? Web-based training? Both?

- Can I leverage existing content?

- Should I change my business processes or should I customize the application? Fit/Gap Analysis

- How will I manage change in my organization?

- How can I minimize risk to my company?

- Resources – who is going to do the work? Project often have limited training, business, and technical resources.

- Budget – do we have the budget to do the work?

- Time – do we have the time to do the work?

The UPK Alignment should cover the following topics:

- Which UPK Version is used, i.e. 3.6.1 and how many UPK developer licences are available?

- Application Information such as Target Application (i.e. Oracle E-Business Suite 12.1.3), development dates, start / go live date, development languages, number of Topics, which system will be used for recording the topics?

It is very important to know the status of the target system which will be used for recording the topics. For example if you are going to use CRP2 you need to ensure that the set up is complete and master data is uploaded.

- Deployment Requirements such as required publishing formats (html, stand alone), printed documentation (Job Aid, Training Guide, Instructor Manual, Test Document), playback modes (See It!, Try It!, Know It, Do It!, Print It!), pop up and toolbars (hidden or shown).

- Authoring Style (i.e. training style informal)

- Development and Editing Standards

    o Default colours vs. agreed colours

- o Fonts, sizes, etc. for frames (action, introduction, end, action, explanation), string input and web pages
- Bubble pointer defaults and icons (i.e. default is left top pointer)
- Web Pages
  - o Web Page Attachment Icon Default (i.e. green book)
  - o Web Page Attachment can be added to any frame
  - o Tooltips appears when user rests mouse pointer over icon when on a frame
  - o No limit to length but concise and descriptive most useful
  - o Use same icon for same types of information

Agree Settings for:

- Action Area/Colour, i.e. default - red

  Agreed Setting

- Recording and Editing Options for
  - o Introduction frame text
  - o Scenarios
  - o End frame text
  - o High light fields names
  - o Narrative mode, i.e. 2nd person (You) instead of 1st person (We)
- Know it mode (on occasions it may be necessary to move the Know It? bubble if it covers an area where you want to carry out an action.)
- Player Option (Introduction frame can be suppressed in Playback mode if required.)
- UPK Defaults (Use Template Text, Show Custom Text First)
- Custom Text
- Explanation Frames (When to use, Narrative Mode, Title, Highlight Field Names)
- Web Page Attachments (When to use, Narrative Mode, Title, Highlight Field Names)
- Decision Paths/Alternative Paths (When to use)
- Jump-in Points (When to use)
- Glossary
- Concept Pane (Outline - Top Level Module, Section level, Topic level)
- Roles (determine which roles to use)
- Keywords
- General Defaults

- o Language

- o Screen Resolution

- o Frame Delay (For explanation frames infinite is required.)

- o Know It? Required Percentage, i.e. 75%

- o Remediation options (Level 1-4)

  - Level 1 – User asked to try again

  - Level 2 – User provided with instructions

  - Level 3 – User provided with instructions plus action area is highlighted

  - Level 4 – The step is completed for the user

- Other Player Defaults

  - o Include Sound File

  - o Convert Screenshots to 256 colours

  - o Create links for backward compatibility

  - o Play audio

  - o Enable users to change their Player preferences

  - o Enable skipping in Try It! mode

  - o Key combination for advancing in Do It! Mode

- Navigation

- Start and End Screen

- Highlighting contents of a field

- Click and Drag/Drag and Drop

- Scrolling

- Drop Downs

- Documentation Standards such as Document Publishing Options

  - o Default Font i.e. Arial 10

  - o Document Types – Default Settings for Business Process, Job Aid, Training Guide, Instructor Manual, Test Document such as Include Alternatives, Text Mode, Output Format, Images Concept Panes, Images Web Pages

  - o Include Alternatives

  - o Text Mode

  - o Output Format (i.e. Word, PDF)

  - o Include Images from Packages

- o   Include Images from Web Pages

- o   Suppress Screenshots

- o   Style (i.e. Player Logo appears on upper left hand corner of published Player Interface. Can be replaced with Company logo or graphic.

The preparation of the user training environment and adjustment of the Application Set up consists of the following activities:

- Determine which system to clone, i.e. CRP2

- Check on the new cloned system

  - o   Missing set ups

  - o   Missing master data

This can be easily proved by processing the test scripts from CRP or UAT before you start the actual recording.

Agree with the client on how to handle missing set ups and missing master data which prevent you from recording. This can be either working on a different environment or defining an escalation path.

The UPK Alignment is not only the scope of your UPK training project but serves as the guidelines for new UPK consultants hired during the UPK development. Often the client starts with a few UPK consultants and during development realizes the actual workload. When hiring a new UPK consultant, the UPK Alignment document will bring this consultant up to speed to start in the project. You will save time since you do not need too much explaining and demoing the quality standards of your scripts to develop. The UPK Alignment document will do that.

Phase IV UPK Development

This phase consists of the development of the user training materials. This is the actual recording and should be executed with different statuses (record, review, update, etc.). It provides the content and software tools to capture and play back the exact steps a user would use to enter data in a formal business application. System transaction documentation, job aids, user acceptance test scripts, instructor led and online training, and online performance support are valuable content pieces that can all be created from one recording. As part of online training, users can use the simulation playback to be trained and tested on their understanding of how to complete activities that are part of their daily job. The development does not only include the recordings but also business reviews, updates and script enhancements such as adding web pages, glossaries, explanation frames, concepts, scenarios and ensures the quality standard.
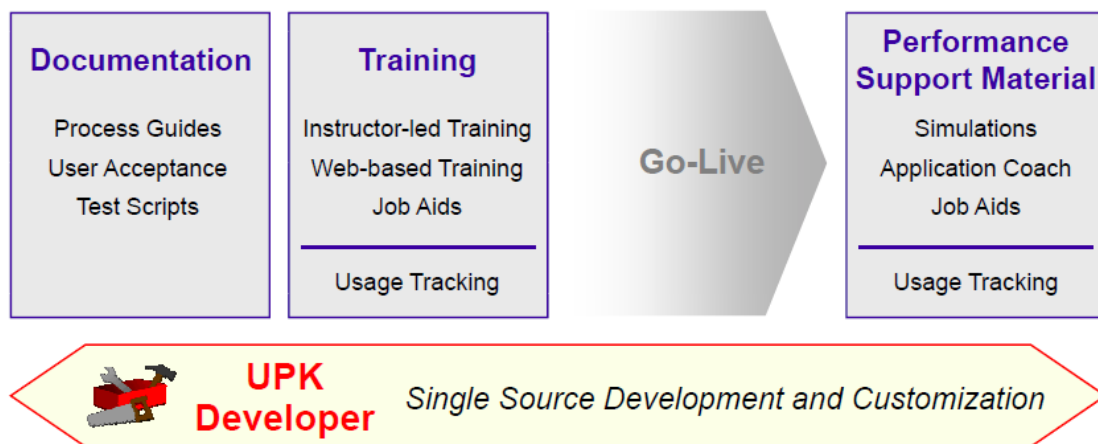

Fig 11: UPK in the Implementation Lifecycle

Test scripts

The sources for developing the UPK content are test scripts and the future business process flows from Phase I. Since the recording captures the exact step a user would enter, the BP.080 documents are too high level and therefore test scripts should be used. You should be able to reuse the test scripts you created during Test Business Solutions (BR.080); however, the focus of business solution testing is confirming individual business processes, while business system testing focuses on confirming the collective application system.

A system test script contains detailed steps which testers follow to verify the system setup and the integrity of custom application extensions for supporting business processes.

System Test Specifications

A test specification is the component of a test script that defines test script execution. Based entirely on a specific business process, it consists of scenario information, process information, and a series of test steps whose order was determined from the process. A test specification communicates the following:

- Test Scenario, script descriptions.

- Test steps detailing the business testing requirement of a scenario.

- Tester name, also used for quality assurance.

- The sequential relationship between test steps.

- Time (minutes) expected to execute the test scenario.

- Stream and Module.

- Is scenario in or out of the UPK scope? This is important and determines whether the test scenario will be used for the UPK recording.

- Comments column for technical issues and missing set ups or comments during UPK recording.

- UPK owner.

- The actions performed in each test step.

- Data profiles and conditions involved in each test step.

- Expected Results or expected application system responses in each test step.

The figure below represents the relationships between the process, process steps, scenarios, and test steps. A business process can have multiple process steps. Likewise, a business process can have multiple scenarios that involve the same business process. The System Test Script should include multiple test steps that evaluate the process steps for each of the scenarios.
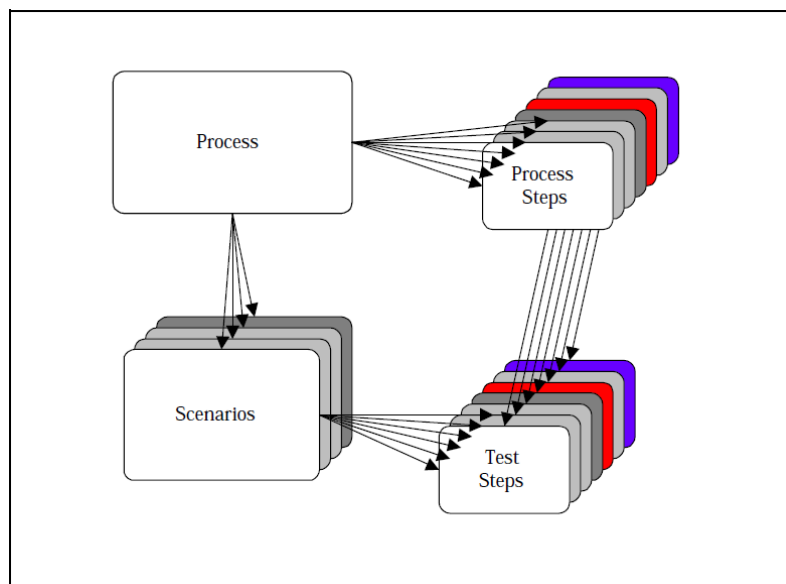

Fig 12: Scenario and Test Steps Relationship

System Test Specifications also provide for recording the results of tests — both qualitative (for example, description of outputs) and quantitative (for example, measured cycle time of the actual test). The following graphic illustrates a sample of a test script.

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	A	B	C	D	E	F	G
1	Subject	Test Name	Step Name (Design Steps)	Description (Design Steps)	Expected (Design Steps)	Creation Date	Description
2	SAP ECC\UPK Demonstration	Create Sales Order	Step 1	Stephanie has just been hired as a customer order agent. She is having difficulty understanding the Sales Order process.

Let's try to help Stephanie. | | 05/10/2010 11:33 | The purpose of this to ensure each ste required for the cre and accurate postir sales order is corre |
| 3 | SAP ECC\UPK Demonstration | Create Sales Order | Step 2 | The first step of this four step process is that a customer places an order with the customer order agent. | | 05/10/2010 11:33 | |
| 4 | SAP ECC\UPK Demonstration | Create Sales Order | Step 3 | The customer order agent then enters the order within SAP. | | 05/10/2010 11:33 | |
| 5 | SAP ECC\UPK Demonstration | Create Sales Order | Step 4 | Once the sales order is entered into SAP, the shipping department receives a notification of the order.

The inventory personnel will take the order and begin to collect the materials and have them prepared to be shipped. | | 05/10/2010 11:33 | |
| 6 | SAP ECC\UPK Demonstration | Create Sales Order | Step 5 | After the order is collected and prepared for shipping, the order is then loaded and shipped to the client. | | 05/10/2010 11:33 | |
| 7 | SAP ECC\UPK Demonstration | Create Sales Order | Step 6 | Now we will review the procedural steps within SAP.

This part of the task is learning how to enter a Sales Order within SAP. This is the first step in ensuring that customers and partners receive the goods or services purchased. | | 05/10/2010 11:33 | |
| | SAP ECC\UPK | Create Sales Order | Step 7 | Enter the desired information into the Transaction | | 05/10/2010 11:33 | |

Fig 13: test script

UPK Modes

Once a company has defined their test cases, the next step is to determine which cases will be recorded. UPK Developer can be used on a test instance to capture the various steps an application user would go through to enter and complete a transaction in the application.

The UPK Developer is your single-source platform for developing and customizing content. It is the recording technology that enables content creation by simply doing the task in the application. Normally, you should allow access only to a limited team of content authors such as 3-6 UPK experts. The content is made available to users through a Player or document output. The Developer allows you to create and publish content easily. Content includes simulations, in-application support, and interactive documentation. Users gain a well-rounded knowledge of software functionality, complete with an understanding of the concepts, by learning how to use a program in both a simulated environment and while working with their own data in a live environment. Simulations can be viewed in any one of the following playback modes via the Player:

Mode	Symbol	Description
See It!	See It!	See It! Mode enables a user to learn by watching an animated demonstration of the steps for a task being performed in a simulated environment. All of the required activities, such as moving the mouse and entering data, are completed automatically. This is like watching a TV program.

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Mode	Symbol	Description
Try It!	Try It!	Try It! Mode enables a user to learn interactively in a simulated environment. The user is prompted for mouse clicks and/or keystrokes to complete the task.
Know It?	Know It?	Know It? Mode is an assessment-type playback mode in which users are instructed to complete a particular task. Users do not receive step-by-step instructions for completing a task. Instead, they complete the steps on their own in a simulated environment, and they are scored on how accurately they complete them.
Do It!	Do It!	Do It! Mode enables a user to learn interactively using live data. A user is presented with a small window on top of the live target application that displays each step for a particular task. As the user completes each step, he/she can click a button or use a hot-key combination to display the next step in the process. Within the Do It! window, a thumbnail graphic of the screen is available with a highlight indicating the area where the action should take place.
Print It!		Print It! Mode enables a user to display linked documentation in the form of a Job Aid or Business Process Document.

Before you start with the actual recording, you should consider some important parts in the process, which will ensure the appropriate quality standard for your training.

Master and Status

Consolidate your test scripts into one big master file in Excel where you can insert a status column and filter and those during the development of the UPK scripts. This supports you in work load estimations during the development and helps you during the project management status meetings.

Status Nr.	Status	Description
1	Not started	UPK script is required and script has not been recorded yet.
2	1st Recording	UPK script recorded by consultant according to input either from client or from test script.
3	1st sign off	UPK script is under first review by business.
4	1st update	Consultant updates UPK scripts after first feedback from business. This consists mainly of providing additional information such as explanation frames, web pages and replacing screenshots.
5	2nd review	UPK script is under second review by business. This is to confirm that the updates meet the client's expectations and give business an opportunity to give additional requirements.
6	2nd update	Consultant updates UPK scripts after second feedback from business. This consists mainly of fine tuning the UPK script.
7	2nd sign off	The update UPK script is under final business review.
8	Ready to publish	UPK script will be published on the web server during the next release. After you publish content, you must deploy it. When you

Status Nr.	Status	Description
		deploy content, you are placing it in a location that can be accessed by users. The format you chose to publish determines where and how the content is deployed.
9	Published	UPK script is published and available on the web server.
10	N/A	Duplicate script in master file, no script required cancelled or other reason for not required for recording.

Best Practice Approach

You can start directly recording in UPK with the input from your master file. However, you might face issues such as missing data conditions, missing set ups or missing master data such as default accounts. In this case, it is better to start the 1st recording together with a business person. The more face to face input from business you receive for the actual recording the better. Otherwise, it can take quite an effort to update the script recorded or in the worst case it can result in a complete new re-recording required for the UPK script.

If a business person cannot be made available due to time and budget, you can take the following approach.

1. Run the script in the test environment which is used for recording, such as a clone from UAT or CRP.

2. If the topic cannot be recorded, write down the missing set ups, master data, missing data conditions, etc. Inform the customer about the missing set ups.

3. Obtain a decision who will do the missing set ups, missing master data or missing defaults.

4. Produce the topic based on the test scripts. This is the 1st recording and does not contain any customized bubble text.

5. 1st review of the topic from the client either on paper (published training guide) or online using try it mode.

6. Update the UPK script with the review and input from the 1st review. This includes customized bubble texts, web pages, concept pages, scenarios, URL's, glossary items, attachments, presentations, Visio charts and roles.

7. 2nd review with client's business expert. 2nd update by consultant based on input from 2nd review.

8. Sign off by client.

9. Publish and deploy UPK script.

Escalation Path

Agree on who to contact if business is delaying 1st review or is not doing the 1st review at all.

Create a backlog of not reviewed topics and agree on whom to escalate.

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Working with the Library

The Library shows the entire content repository and its organization in folders. Each folder displays the documents or other folders that it contains. This folder structure is defined by an author. A System folder structure is also created during installation that contains various system-wide documents for publishing styles, templates, and attachment icons. Prior to recording it is a good idea to have a logical structure in place where documentation will reside. Hence, the Library is a central repository of all your documents (or content). Similar to organizing files in Windows Explorer, you can organize documents in the Library in a number different ways. It is best to organize your Library in a way that best meets your content creation standards.
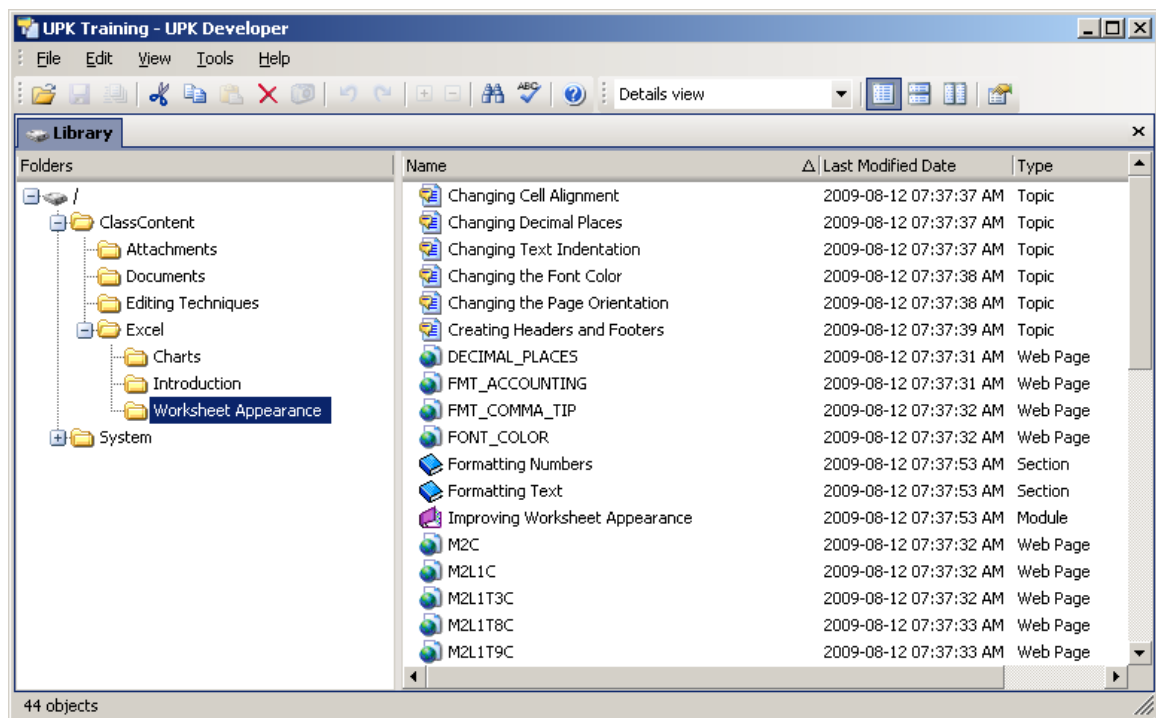
Fig 14: The Developer Interface

In a multi user development environment it is best to design your Library structure at the beginning of the training project and communicate to the team the structure and authoring standards that should be used. This should be a team discussion with a single person taking ownership of the Library structure. Also, it is best to keep your structure as simple as possible (probably no more than 3 levels) to avoid overly complex and confusing structures.

The following are some possible ways of organizing documents in the library:

Library organized by Project

Create folders for each project. Within each project you can create subfolders for each application within that project. You can further organize within each application by the various document types (modules, sections, topics, packages, web pages, etc.)

For example Project "TANGO" is a large ERP implementation with different Oracle Financial modules and different process streams. When you build content, you create, edit, and link various documents that are stored in the Library folders. The Developer provides the various document types that allow you to:

- Create an outline to facilitate content presentation and navigation

- Record application simulations for playback

- Construct conceptual and introductory content that link to outlines and recorded frames

- Develop glossary terms

- Define roles for document filtering

- Customize publishing style output

The following table describes each document folder and type:

Type	Symbol	Description	Sample
Profile		When you start the Developer for the first time in a multiuser environment, you are asked to create a login Profile that controls the connection to a specific content Library on a shared server. After you create and open a Profile in either a single or multi-user environment, the Start Screen appears.	Tango Project
Module		A module (purple book) is used to organize a specific unit of learning. It can contain other documents such as sections, topics, or even other modules to form a component of an outline. A module can also have conceptual content linked to it that provides a general description of the content that is contained within it.	Purchasing
Section		A section (blue book) is very similar to a module in that it also can contain other documents such as sections, topics, or other modules. The main difference between a section and module is its visual representation that can help you differentiate between the components of your outline and locate areas in the structure faster. A section can also have conceptual content linked to it that provides a general description of the content that is contained within it.	Managing Requisitions
Topic		A topic represents a series of recorded steps that complete a task in an application. Topics are where you record application-specific transactional content; whereas modules and sections provide the structural components of your outline.	Submitting Requisition Changes
Package		A package is a collection of one or more files that can be imported and attached to documents as additional content. For example, a package can be as simple as a document that contains an image file or more complex where it contains multiple files that comprise an entire web site.	Requisition Types
Web Pages		A web page is an HTML page that can contain text, audio, images, and hyperlinks to other	Approval Workflow

Type	Symbol	Description	Sample
		content. It can be linked to modules and sections or frames and bubble text within a topic.	
Glossary		A glossary is a list of specialized terms unique to your company, or terms that require further clarification for your users.	Non Inventory Requisitions
Role		A role generally represents the actions and activities assigned to or required or expected of a person or group. A role is used to filter topics in the Player.	Buyer
Template		A template controls the bubble text that is automatically populated when you record a topic.	Double Click on Requisitions
Publishing Project		A publishing project contains all of the files that are used in a publishing style. For example, the Training Guide publishing project has various Microsoft Word documents and XML files that control the output format of this style. You can customize a delivered style by copying the relevant publishing project document and editing the files to define your custom style.	Purchasing Training Guide
Recording		The Recorder functions like a screen capture utility. When you record a topic, you are taking a series of pictures of the way the screen looks after each step in a task.	Requisition screen

Library organized by Application

This is the default organization when content is converted from previous versions such as UPK versions 2. A folder is created for each title that you convert and within each title folder there are folders for each module. Within each module are the documents that are linked to that module. You may want to create additional subfolders by document type or move your documents into one of the other Library organization structures. Also consider how you intend to version your content. For example, if you are building content for an application, you may want to design your Library folder structure around the version of the application and duplicate all your content from version to version.

Library organized by Authors

If you normally divide workload by content author or teams of content authors, organizing your Library documents by team may be your best approach. This allows multiple authors to quickly see who owns a particular set of content and makes it easy to locate your documents. To organize by author or team, create a folder for each content author or group of authors. Within these folders you can employ one of the other organization methods above to further organize your documents. You may even want to organize by locations if you have different groups in different locations working on content.

Library organized by Document Types

If you are producing a large volume of content sharing you should consider organizing the Library by document type. This allows content authors to focus on specific types of content. For example you may want specific authors creating all of your glossary terms or creating packages that will be used by other content authors. Organizing by type may make more sense as a second layer of organization.

Library organized by Localizations

If you are planning to localize your content you should make a complete duplicate of the source content before it is translated into the target language. To keep all of the different languages organized you should create sub-folders within your content folder hierarchy for each language. One guideline is to keep your Library simple. Do not make overly complex folder structures and try to keep the Library between a maximum of three levels depending on your content.

Building an Outline

You need to build an outline to place your content. The way that you build the outline will be the way that it is displayed to the users. The outline is the grouping of modules, sections and topics. You build an outline by linking documents together in a way that best fits to the information that you want to communicate to your audience. There is no content created or stored in the outline. If the topic is deleted from the Library, it also breaks the link to the topic in the outlines where it is linked. Conversely, deleting a topic from the outline does not delete it from the Library; rather it only removes the link to the topic. When setting up views in the Outline Editor you should customize the Details View to match your content author responsibility.
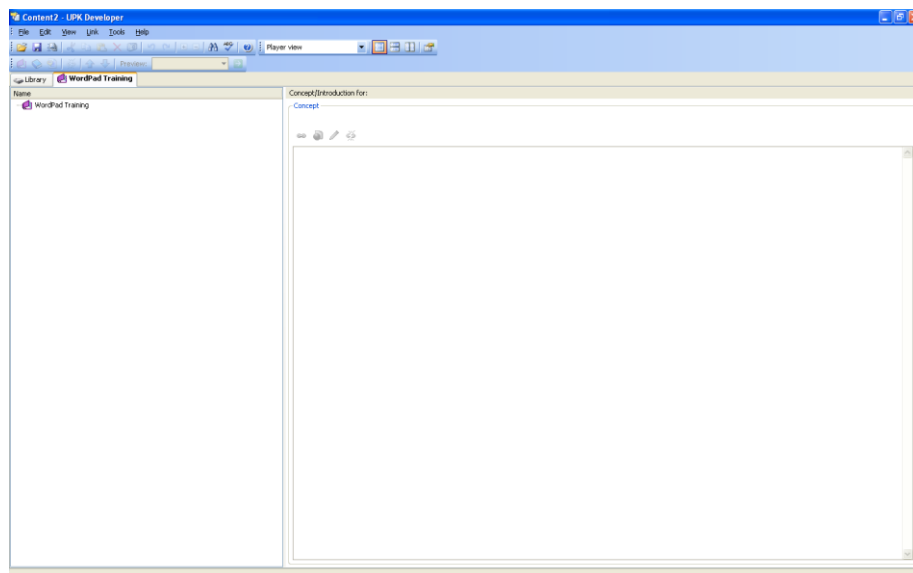

Fig 15: Building a Content Outline

For example, if you are translating content from one language to another, you should add the Language column to the view to be able to quickly differentiate content that may be named the same but be in different languages. Structure the content outline based on how you want to deliver the content to your users. This could vary by publishing style, end user population, locations, workgroups, job role, language, etc.
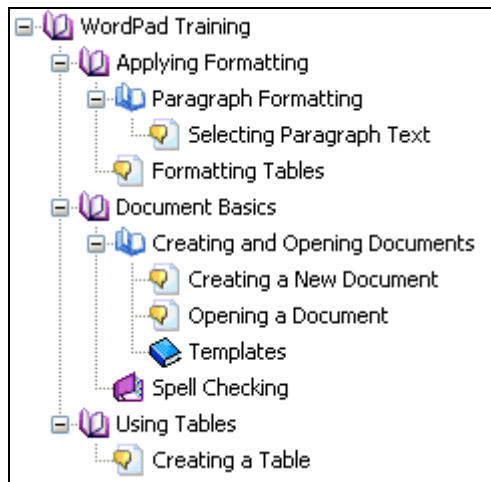
Fig 16: Linking New Modules, Sections and Topics

Viewing and Finding Documents

When you create documents in the library or topic editor it is important to understand their function within the UPK developer. In the event that you accidentally close tabs it is important to quickly retrieve these documents. When setting up views in the Library you should customize the Details View to match your authoring role. For example, if you are responsible for translating content from one language to another, you should add the Language column to the view to be able to quickly differentiate content that may be named the same but be in different languages. No matter how you choose to organize the content in your Library, it is important to take into consideration the permissions of folders. Since permissions are set at the folder level and permissions are, by default, inherited, it is important to understand how your Library structure and content permissions relate to one another.

Content Defaults

Content Defaults should be agreed and defined before commencing any recordings. They provide the system with default data. If you have multiple authors following the same standards you should export the default settings as a file (CONTENTDEFAULT.ops) that can be imported into other author workstations

Recording a Topic

Record your topics as described in your test scenarios. In the outline editor or the library, select the topic you want to start recording. Press the camera symbol 📷 to start recording. The recorder pops up on the top of the Oracle Application while you are recording the tasks. When the recorder is active, the outline editor is closed since it allows the recorder to take screen shots as you perform the steps. Each time you capture an action while recording, the Recorder disappears while the screen is captured to prevent the Recorder from appearing in the results.

The Recorder works like a screen capture utility. When you record a topic, you are taking a series of pictures of the way the screen looks after each step in a task. Each screen image you capture also has an associated action. This action that you perform (mouse click or keyboard action) moves you to the next screen. The screenshot and associated action are called a frame.

As you record frames, two display fields in the recorder help you keep track of what is being recorded. The Next screenshot records field displays the action that you have performed that

will be captured the next time you press [PrtSc] Printscreen. The Last recorded event field tells you the action that was captured the last time you pressed [PrtSc] Printscreen.

When you start the Recorder, the Outline Editor closes and the Recorder opens. The title of the topic appears in the Recorder's title bar. Below the title bar, the screen capture instructions tell you what key or key combination to use to record an action/screen capture.

When recording in the Developer, you press [PrtSc] Printscreen after each action. There are three categories of actions: Mouse, String Input, and Keyboard. A Mouse action is any action performed with the mouse, including clicking, dragging, or pointing.

A String Input action is defined as entering text into a document or field by typing on the keyboard. You press the [PrtSc] Printscreen key after you have typed the text to capture the screen with the text. A Keyboard action is defined as pressing any function key, cursor movement key, or any other single key, such as ENTER, TAB, ESC, INSERT, or DELETE. This action type also includes key combinations, such as CTRL+A and SHIFT+ENTER. You press the [PrtSc] Printscreen key after pressing the key or key combination to record the result.

Remember when working in a multi user content development to use the Document Check-In and Check-Out functionality. Put useful comments in the Version Control when checking in documents.

Preview a Topic

When you finished recording a topic, you can edit the steps at the end of recording, however I always save the topic first before starting editing. And before starting the editing, you can preview your topic in the different modes, such as See it!, Try It!, Job Aid, and the System Process. The advantage of previewing topics is that you will see how your topics look like before you publish them. This will give you a better insight and allow you to make changes to your topic.

You can preview a selected topic only from the Outline Editor in any of the Player modes such as See It!, Try It!, Do It!, and Know It?; document formats such as the Business Process Document, Job Aid, Test Document, Training Guide, and Instructor Manual; and the Presentation format. You can only preview one topic at a time and the topic must have been recorded. You can also only preview a topic in a Player mode if that mode has been enabled on the Properties tool pane of the topic.
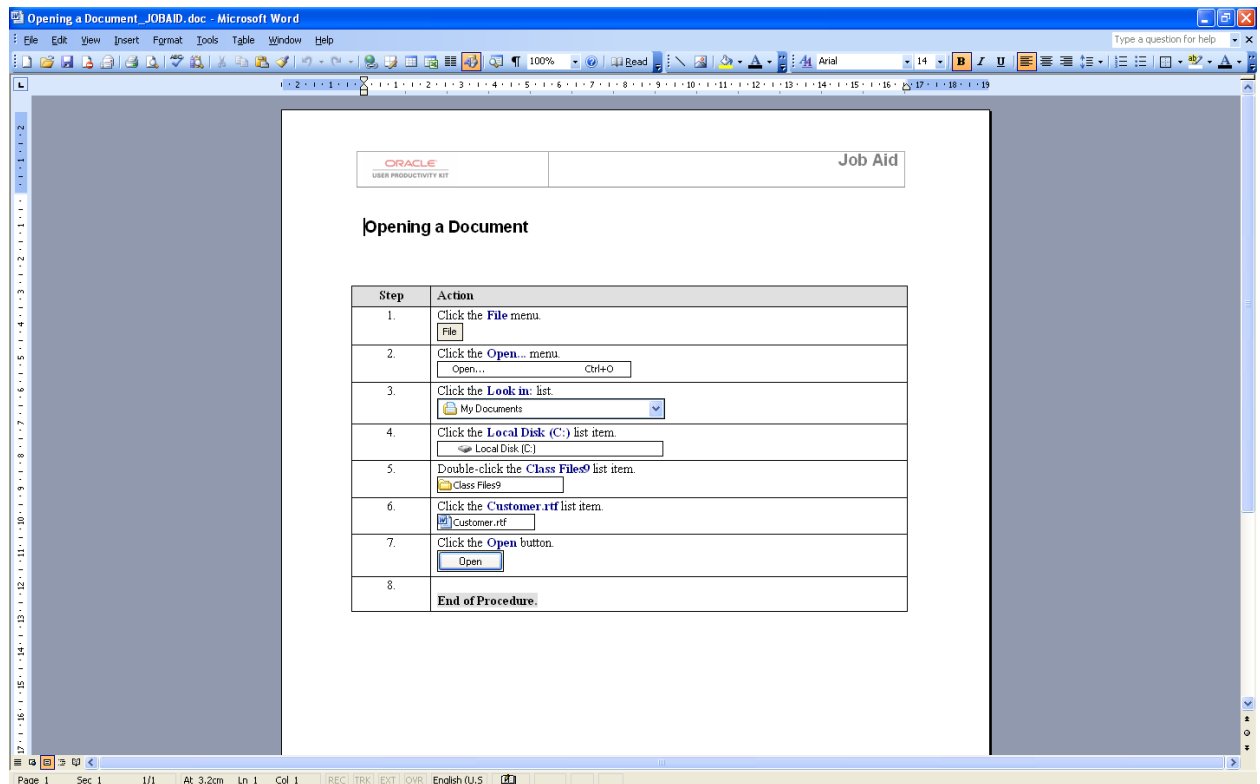
Fig 17: Job Aid Document

Each of these preview options appears below the Player modes on the Preview list box. When you choose one of these options, the document appears as read-only in Microsoft Word or Adobe Acrobat, depending on the options you selected for the format you are previewing.

Topic Editor

The Topic Editor will be used to edit content that has been recorded. You can also edit the Concept and Introduction information for the topic. The Topic Editor contains a menu bar, toolbars, and the screenshot for the current frame. The Topic Editor also includes five properties tool panes that provide additional information about each frame: Frame Properties, Frame Structure, Sound Editor, Concept, and Frame Link.
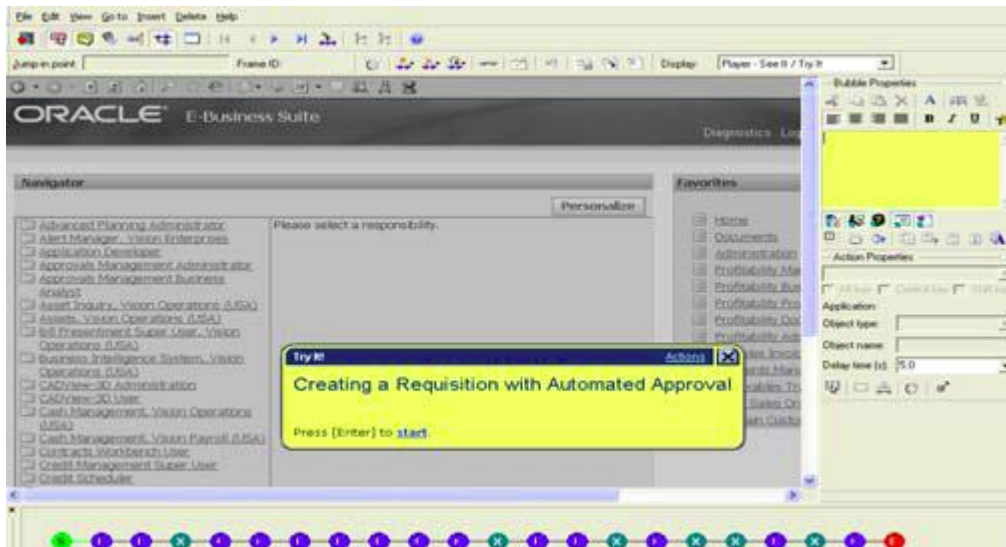
Fig 18: Use the topic editor to update your script from the business reviews.

You can navigate the frames in a topic easily using the navigation icons in the toolbar of the Topic Editor. You can move forward or back one frame or jump to the Introduction or End frame of the topic. If a topic contains branches with different End frames, a menu with the available End frames appears to allow you to choose the End frame you want. The Frame Structure is a graphical representation of each step in a topic. When displayed, it appears in its own pane in the Topic Editor. The Frame Structure pane contains a circle for every frame of the topic as follows:

Frame Type	Icon	Description	Sample
Introduction Frame		The Introduction frame appears in the lower right pane in the Player when a user selects a topic in the outline. You can also set it to appear as the first frame before the action frames during playback. It typically contains a short statement introducing the topic; however, you can add any text that you desire. When you first open a topic, the Introduction frame displays a green circle only because it is the selected frame.	Creating a Requisition with Automated Approval
Frame		When you select a frame, the frame's circle changes to green and the screenshot for that frame displays in the Topic Editor.	Requisition Header
End Frame		The End frame appears during playback as the last frame of the topic after the action frames. It typically contains a short statement about the result of the actions performed in the topic. For example you can write "Congratulations! You have successfully created a Requisition with automated approval." Like the Introduction frame, you can add any text you feel is necessary.	Requisition Summary
Decision Frame		When you are recording topics, you may find that several tasks share common steps. Instead of recording separate topics, you can insert a Decision frame to allow your users to choose from two or more options. For example, from the Print dialog box in your	Print dialog box

Frame Type	Icon	Description	Sample
		application, you can print all pages in the document, the current page only, or a range of pages. For each task, you follow the same steps to open the Print dialog box and start the printing process. You could record the steps for printing all pages and then insert a Decision frame to record the other print options instead of creating individual Print topics. Decision frames provide a way to document multiple tasks rather than different methods of accomplishing the same task.	
Explanation Frame	X	An Explanation frame is always inserted after the current frame. The screenshot used for the Explanation frame is the same screenshot used for the frame that follows the Explanation frame. In the empty bubble, you can enter text that explains something about the step or call the user's attention to something on the screen. Explanation frames appear in See It!, Try It!, and Do It! modes; they do not appear in Know It? mode unless the bubble text is marked to appear in that mode.	Usage of Requisition Templates

The Frame tool pane in the Topic Editor contains settings that allow you to change the appearance of the bubble and bubble text, as well as describe the action performed in the frame. The Frame tool pane has two sections, separated by a divider bar. The section above the divider bar contains the options for the bubble and bubble text, and the section below the divider bar contains the settings for the action. You can drag the divider bar up or down as needed, for example, to see more of the bubble text in the upper section. The Developer generates default text for the bubble for each frame using the action settings to determine the correct template text to use.

If the template text is not the text you want for a particular frame, you can choose not to use it. If you deactivate the template text, it is cleared from the bubble and you must enter bubble text manually. You can add your own custom text to the bubble, in addition to the template text. You enter the text in the text edit pane of the Frame Properties tool pane. By default, the text you enter appears before the template text, so that users read it first before performing the action. It is good practice to separate custom text from template text with an extra blank line, to make it more readable.

You can change this default for all frames on the Bubble page of the Content Defaults section of the Options dialog box. For an individual frame, you can deselect the Show custom text first option to show the template text first.

Insert and Delete Frames

Inserting and deleting frames are common occurrences when developing. You make have realised that you have missed a step and it is necessary to capture it without having to capture the entire process again.

You can insert frames in an existing topic. When you insert a single frame, you are recording a single action; therefore you must take two screenshots, so that the Recorder can capture the screenshot and the action you perform. When you insert multiple frames, the recording process is identical to recording a topic; the Recorder captures the starting screenshot and the successive actions and resulting screenshots for new frames. You insert a new frame after the current frame. You should make sure that you know where in the topic you want to place

the frame. You should also be sure that the screen in the application you are recording is set up to match the correct step in the task where you want to insert the frame.

Sometimes you will need to delete frames where you may have captured a screen twice. Before a frame can be deleted, you must delete all Alternative Actions or Alternative Paths that begin on the frame.

Explanation Frames provide users with supplementary information about the process. No action is associated with this type of frame; it is simply a screenshot image and a bubble with text.
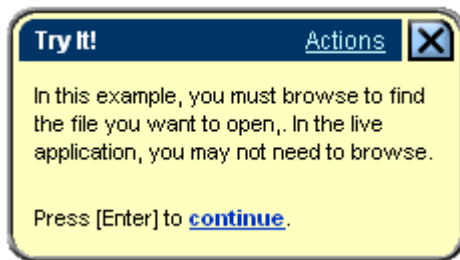

Fig 19: Explanation Frame Sample Bubble

An Explanation frame is always inserted after the current frame. The screenshot used for the Explanation frame is the same screenshot used for the frame that follows the Explanation frame. In the empty bubble, you can enter text that explains something about the step or call the user's attention to something on the screen. Explanation frames appear in See It!, Try It!, and Do It! modes; they do not appear in Know It? mode unless the bubble text is marked to appear in that mode.

Edit a Topic

After recording a topic you will need to review and revise it. You will need to make sure that the action areas are properly highlighted as this is where a user will need to select. The lower section of the Frame tool pane contains settings that describe the action performed in the frame. As you record a topic, the Developer automatically enters information for these settings, which vary according to the type of action performed. The Developer uses these settings to determine the appropriate bubble text based on the template assigned to the topic. You can change many of the settings as appropriate for your needs.

The Action Type setting indicates the type of action taken for the current frame. For example, the Action "String Input" means entering text into a document or a field by typing on the keyboard.

The Object type setting refers to the type of object on which you performed the action. The Developer determines the object type or class automatically, based on the Template Set selected. The Developer then determines which template text to use for the bubble text. Each Template Set may contain different text for the same object type. Often when you record and drag on a scrollbar, it does not cover the whole scrollbar when you see the topic in the edit mode, hence you need manually to update these frames.

Creating a Concept

In order to have a user friendly published outline, you need to enhance your topic with a concept. The concept should be a screenshot of the most important frame in your topic, which typically represents the business scenario recorded. The concept consists of a screenshot and a summary text for the topic. When you choose to edit a screenshot, the Developer starts the frame image editor you specify on the General Developer Settings page of the Options dialog box and opens the screenshot in that application. You then edit the

screenshot using that application. When you save the file and close the application, the Developer updates the screenshot in the Topic Editor. When you edit screenshots in a frame image editor, the Developer temporarily converts the screenshots, which are in .png format, into .bmp format. Therefore, the frame image editor you use must be able to support .bmp format images.

To edit the screenshot for the current frame:

1. On the Edit menu, choose Edit screenshot.

2. Edit the screenshot as necessary.

3. Save the screenshot in the frame image editor application.

4. Close the frame image editor.

Modify the Bubbles

After recording a topic you will need to review and revise it. You can provide further information in the bubble to help students understand or clarify certain points. The buttons in the upper section of the Frame Properties tool pane allow you to:

- change the text that appears in the bubble

- set text formatting (for example, bold, italics, and alignment)

- select the position of the bubble pointer

- change the background color of the bubble

- link an attachment to bubble text

- decide in which playback modes and output types the text appears

Any changes you make apply to the current frame only.

You can edit and format the bubble text by using the same symbols as in your Windows Word or Excel Programs, for example use the copy symbol 🖼 to select a text you want to copy from a source document, i.e. Oracle User Guide, and use the paste symbol 🖼 to paste the text into your bubble.

But how can you specify the Playback Mode for Custom Text?

By default, custom text is set to appear in See It!, Try It!, and Do It! modes. This applies to text for the Introduction and End frames as well. You can specify the playback modes in which the custom text appears. For example, for certain frames, you may find that the custom text is inappropriate for all playback modes, or you may also want to add custom text to a frame for specific use in Know It? mode to provide users with a hint. You can select the text in the text edit pane, and then deselect or select the Visible in See It!/Try It!, Visible in Do It!, and Visible in Know It? icons below the text edit pane to specify the particular mode.

Bubble	Icon	Description	Sample
Custom Text	👆	The text is visible in See It! and Try It! modes only.	List of Values
Modified	✅	The text is visible in Know It? Mode only.	Select the correct entry from the list of continue

Bubble	Icon	Description	Sample
Text*			
Custom Text		The text is visible in Do It! mode only.	List of Values

* manipulating the text in know it mode is a trade-off. If you leave the custom text for the Know It Mode, you will make it too easy for the users to pass the test. However, if you only enter a text such as "press the correct key to continue", it might be too difficult for the user to continue. For certain actions, you may find that the custom text is inappropriate for all playback modes and can exclude it from a particular mode. If you do not want custom text to appear in See It!, Try It!, and/or Do It! modes, you need to select the text in the text edit pane, and then deselect the mode icon(s). Explanation frames provide a method for adding information to a topic. While Explanation frames automatically appear during playback in See It!, Try It!, and Do It! modes, they do not appear in Know It? mode. If you wish to include Explanation frame text in the Know It? playback, you can select the text and enable the Visible in Know It icon. Be aware that deselecting all of the Explanation frame text for Do It! mode causes the playback to skip the Explanation frame entirely.

How can you handle start and end frames in Know It Mode?

When a user plays a topic in Know It? mode, the Introduction bubble appears. This bubble typically includes instructions for completing the task, and in many situations it will differ from the Introduction text for the other modes. By default, Introduction/End frame text does not display in Know It? mode. For this reason, you should enter and designate text for the Introduction/End frames for Know It? mode only. For example, for a topic in Know It? mode, you want the Introduction text to be "Complete the steps for printing a document." or "Print a document." In this situation, you can enter the instruction text, select it, and then select the Visible in Know It? icon. Next, you would deselect the Visible in See It!/Try It! and Visible in Do It! icons to exclude the text from displaying in those modes.

When a user completes a task in Know It? mode, the End frame appears. Just as with the Introduction text, you may want to enter text that is appropriate for Know It? mode and designate it for Know It? mode only.

How can you display template text in Know It Mode?

Template text appears in See It!, Try It! and Do It! modes by default for all frames. The Visible in See It!/Try It! and Visible in Do It! icons below the text edit pane are selected automatically. On frames where the user is required to enter text, the Template text visible in Know It? mode icon is also selected, as such actions may require the user to enter specific text to perform the step correctly. When you select an Introduction or End frame; the Template text visible in Know It? Mode icon is not available because Introduction and End frames contain only custom text.

So remember the default rule for input bubble text when you update your topic for the Know It Mode:

- no blank bubbles

For example, you can replace the Try It Mode text with a custom Know It Mode text as stated in the table below:

Try It Mode	Know It Mode translation
	Navigate to

Try It Mode	Know It Mode translation
	Select the correct option to proceed.
	Select the correct field to proceed
LOV	Select the correct entry from the list to continue.
	Select the correct list of values to proceed.
Find (top left)	Navigate to close the form.
Close form (x)	Navigate to exit.
	Scroll to view all the values on the tab.
	Select the correct tab to continue.
	Press the correct key to continue.
Action	Press the correct button to continue.
OK	Confirm your selection.
Close Window	Close the Window with the X button

When you update your frame, restore default layout and select Display – Player Know it mode in the top right corner of your screen.

The Explanation Frames will remain untouched except for the Scenario, i.e. 2nd frame. Enable them.
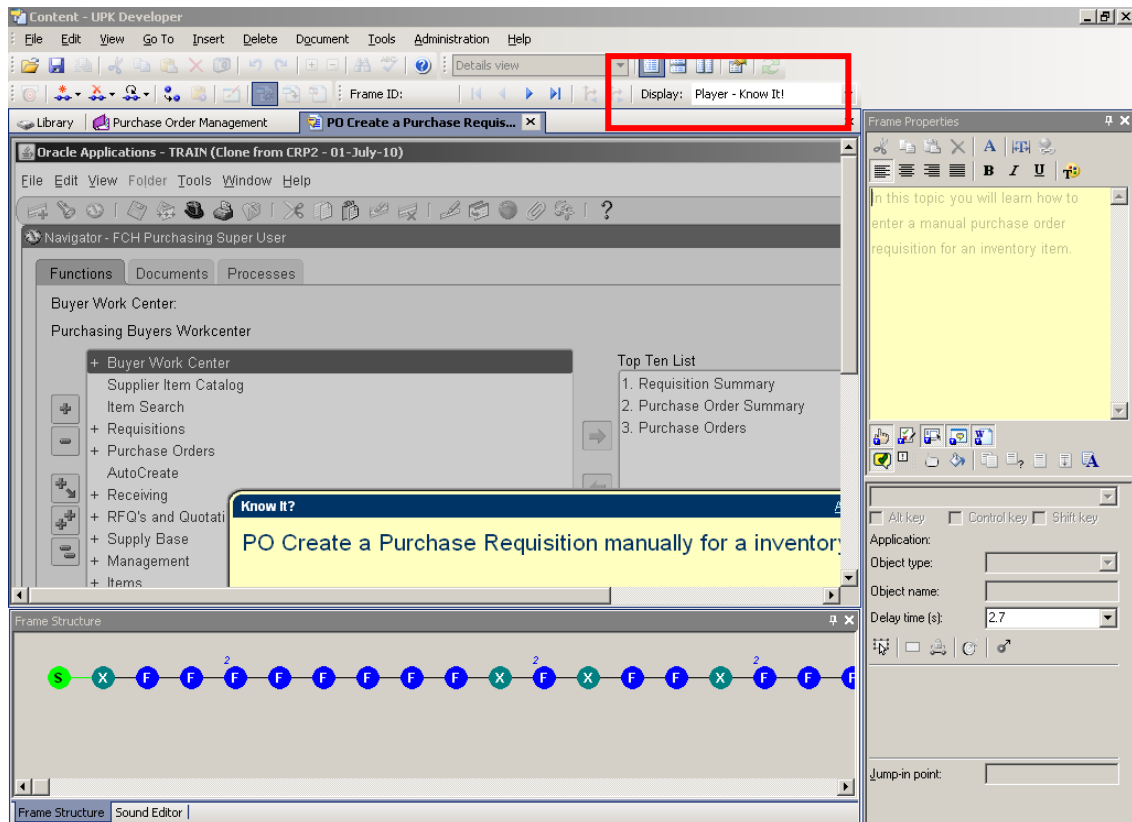
Fig 20: Use the Display button when developing the different modes.

Place the Display button to see bubble in Know it mode. Now you can switch the Display in different modes to ensure that you never leave a bubble blank.

We recommend leaving the start frame and the 1st page as they are.

However, for the frames which you want to change, i.e. you want to have the text visible in Know It Mode? Then highlight the text in the bubble. The existing text is greyed out and hardly visible.

Fig 21: Decide which text will appear in which mode. Pay attention to the Know It Mode.

Know It?   Actions ✕
**This frame will only appear
in Know It? mode if the
bubble contains text
marked for Know It? mode.**
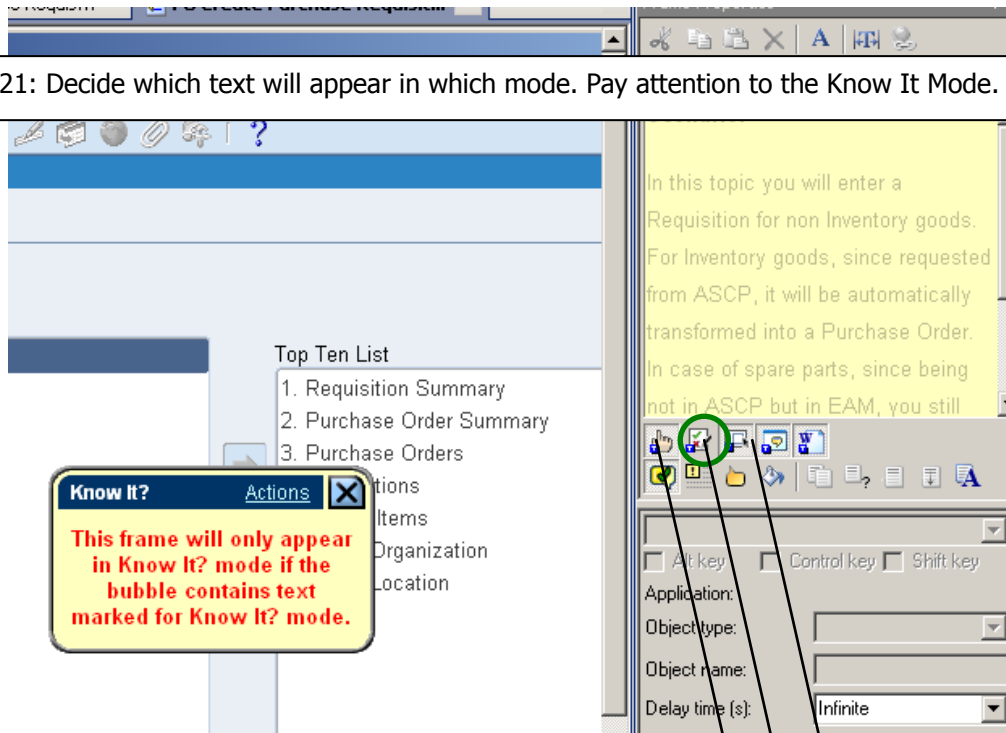
Highlight text in the bubble and select the 2nd icon from the left "Visible in know it mode"
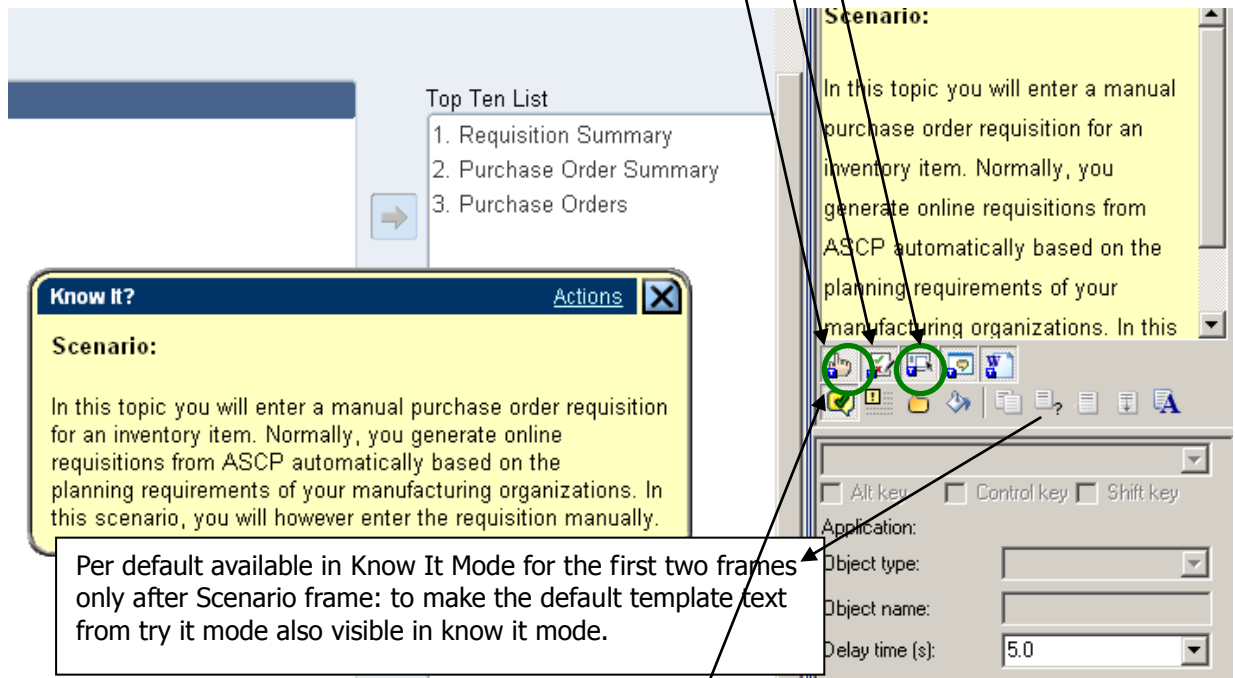and enable it. An enabled icon is "pushed in".

Know It?   Actions ✕

Scenario:

In this topic you will enter a manual purchase order requisition
for an inventory item. Normally, you generate online
requisitions from ASCP automatically based on the
planning requirements of your manufacturing organizations. In
this scenario, you will however enter the requisition manually.

Per default available in Know It Mode for the first two frames
only after Scenario frame: to make the default template text
from try it mode also visible in know it mode.

1. Place the display to Know It Mode.

2. Highlight the scenario and enable it for Know It Mode.

3. For the frame enter your text in the bubble. Highlight it and enable it for Know It
   Mode and disable See It/Try It and do it by selecting the icons. You can toggle
   between the displays to ensure that you have done the Know It Mode correctly.

4. All make use of the icon visible in Know It Mode which is the document and the question mark which is the 6th icon starting from the left hand side in the frame properties.

After a topic is recorded it will reside in the library. The library can get quickly filled with folders, modules, sections and topics. It is important to understand the basics of the library and how to make best use of it for easing the development task. See the above chapters about Libraries.

Create Attachments

As you build content you may wish to enhance it with the use of attachments. Attachments supplement your content with additional conceptual and explanatory information. Attachments can include files developed in external applications, custom web pages with descriptive text and graphics, and Internet and intranet web sites. There are three types of attachments to which you can link documents in an outline. These are:

- Package files

- Web pages

- URLs

Packages are containers in your Library that hold one or more files. Any type of file can be stored in a package, including word processing documents, graphics, computer animations, and so on. You can link from any document in your outlines to any individual file in a package. The package file appears in the Concept pane or is launched in its native application when a user selects the link in the Player.

Web pages are documents that you create in the Developer for displaying additional text and graphics in the Player or document output. You can create a simple web page to define a term or a more complex one that includes graphics and links to other web pages, package files, sound and external URLs.

You can also link from your content to an Internet or intranet web site through its URL address. The web site appears in the Concept pane of the Player or is launched in a new browser window when a user clicks the link, provided that the user is online and has access to the target site.
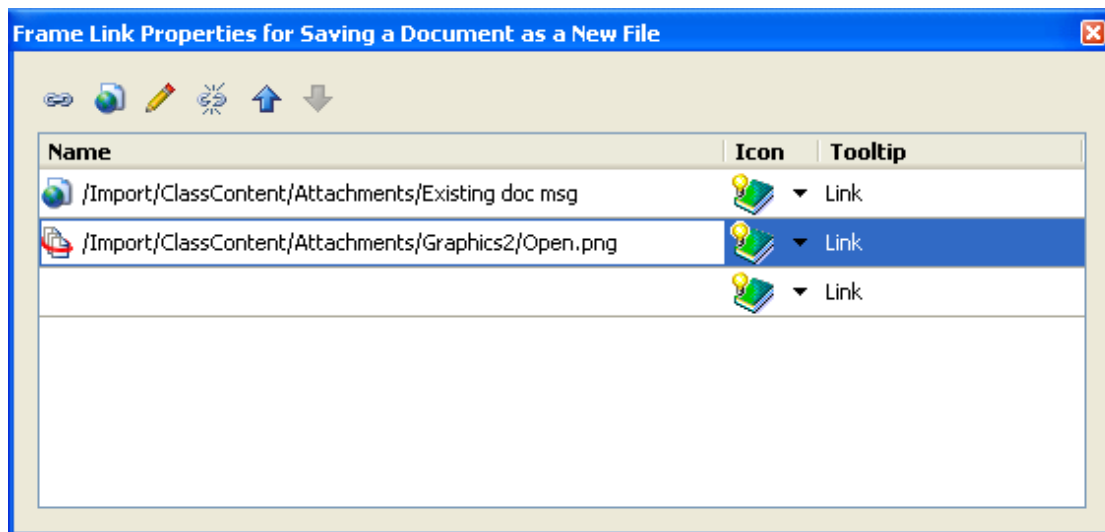

Fig 22: Link an attachment to a frame

When a frame of a topic is linked to an attachment, an icon representing the attachment appears in the bubble in Try It! mode or in the window in Do It! mode for that frame. The user can point to the icon to read a tooltip describing the attachment and click the icon to open the attachment. Bubble text linked to an attachment appears in the frame as a hyperlink. Users can click the hyperlinked text in the Try It! bubble or Do It! window to view the attachment. An attachment linked at the frame or bubble text level always opens in a new window.

You should create a specific Attachment folder in your library, i.e. under each Module. For example the Purchasing Folder will have a subfolder called Attachment and so will have the folder Receivables also a subfolder called Attachment. In this way, you will manage all your attachments in separate subfolders.

The following table summarizes various factors that you should consider in determining which type of attachment best meets your needs in a particular situation:

Type	Advantages	Disadvantages
Package file	Flexible, allows use of virtually any type of file.	User setup/access issues for Player outputs, depending on file type
	Saved in Library so incorporated directly in published Player outputs.	Excluded from document outputs if anything other than a graphic.
	Graphic files included in document outputs when linked at the concept and frame levels or inserted as images in web pages.	For concept links, consider launching from a hyperlink in a web page, rather than linking directly.
Web Page	Saved in Library so incorporated directly in published Player outputs.	Limited web functionality (for example, no tables, no scripting).
	Always compatible with users' systems because created in standard HTML.	
	Can include links to other attachments.	
	Included in document outputs when linked at the concept and frame levels.	
URL	Can use existing, independently maintained content.	Users must be online to access (also consider speed of connection).
	Can use email, ftp, and other URL-based links.	Users must have appropriate permissions for access.
	Address included in document outputs when linked at the concept, frame, and bubble text levels.	Site (URL address and content) must be maintained separately from Library content.

Create a Glossary

As you build content you may wish to enhance it with special terms which are either unique to the business process or to your company. You can use glossaries to provide definitions for these terms. Create a Glossary as followed:

1. Create a glossary document using the Glossary Editor.

2. Assign one or more glossaries to your content using the Properties tool pane.

3. Update your glossary links. The Developer searches the text in your content for occurrences of glossary terms.

When you publish your content to Player outputs, glossary terms appearing in bubble text in topic frames or web page text are linked to their definitions as in the Developer. Users can click glossary links to display the attachments containing the definitions of the glossary terms. When you publish content that contains glossary mark-up to a Training Guide and Instructor Manual, a glossary is included as a list of terms and definitions at the end of the document.

When you create a new glossary or open an existing glossary, the Glossary Editor launches in a new tab and displays an empty glossary (or the selected glossary) where you can add, edit, and delete terms and change their properties (such as tooltip). You can save the glossary to any folder in the Library and then assign it to one or more documents anywhere in the Library.

Usage Tracking

Usage Tracking allows organizations to measure user competency and user adoption of their organizations applications. Also used to identify areas in the application where users require additional training and support.

Fig 23: Usage Tracking

Publishing Content

Publishing the content is the actual deployment of the UPK scripts to the audience. It's like a process in the data warehouse where the data from source systems is copied to a different place and restructured in the format (i.e. Word Document, html, document files, etc.) which suits your training objectives.
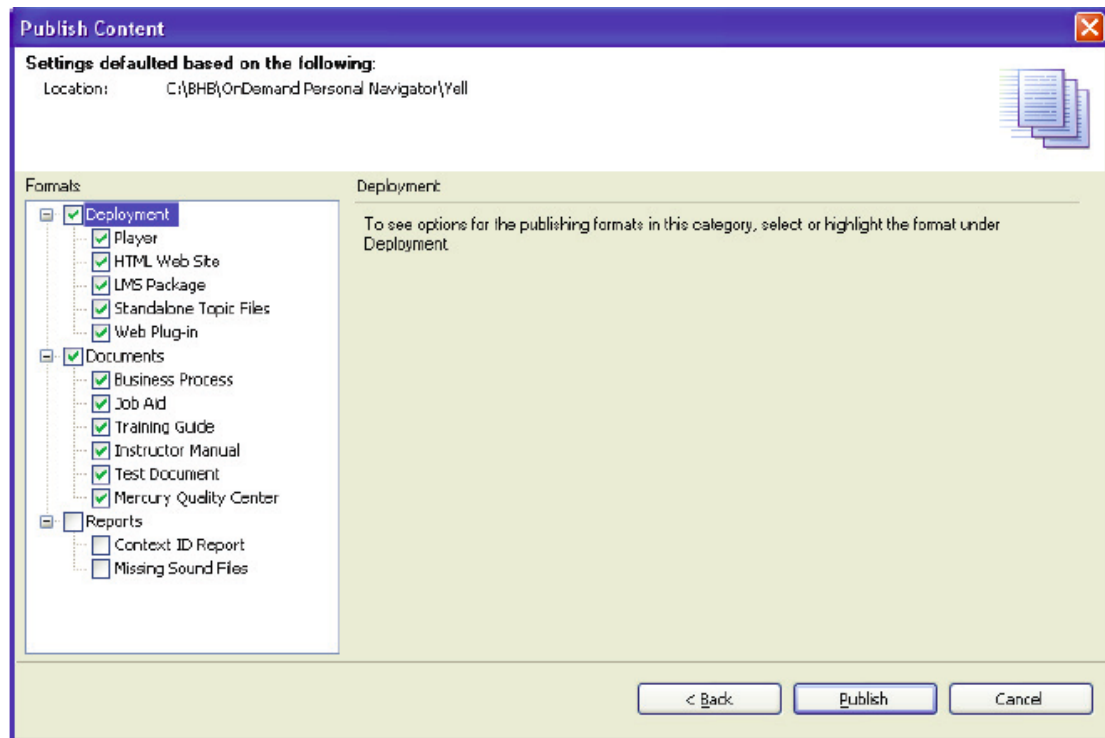
Fig 24: Publish Content

The deployment process can create two types of outputs:

- Player (content deployed to end users)

    o Deployed to the web server

    o Deployed to your local machine

- Document Formats such as Word or Adobe (content deployed as manuals)

    o Business Process Document (BPD)

    o Job Aid (JOBAID)

    o Instructor Manual (INSTMAN)

    o Training Guide (TRAIN)

    o Test Document (TEST)

    o HP Quality Center (TESTDIR)

    For example, when you publish a Training Guide in the Microsoft Word Format from your section "Purchase Requisition", your file name may look like "Purchase Requisition_ TRAIN.doc" as the publishing process automatically adds the Document Type to your file name.

Player

With the Player, the user can view the content and play the topics. The Player interface includes a customizable header (showing for example the company logo), Outline/Search pane, and a Concept pane (this should be a screenshot of the topic, i.e. the major process step, and a short description of the topic.
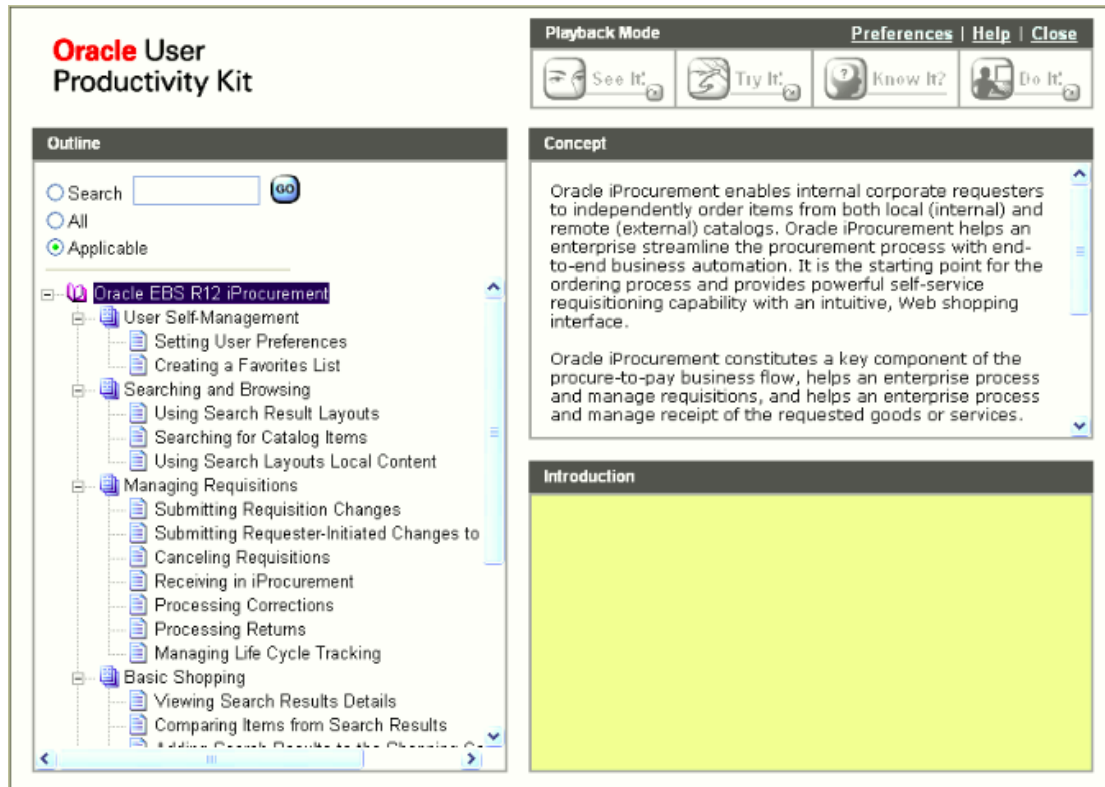
Fig 25: Player with Outline, Playback Mode, Concept and Introduction sections. This page can be enhanced for example with your company logo instead of having the Oracle UPK on the top left corner of the screen.

Users can play topics in See It!, Try It!, Do It!, and Know It? modes. They can also select Print It! mode to view and print a document of the process covered in the topic.

Roles

From a certain number of critical mass of end users, roles make sense to tailor the training to the exact objectives the user needs to fulfil in his / her daily job. It does not make sense to show end users how to auto create a Purchase Order when they only create Requisitions in their daily jobs. However, role-based filtering allows users to quickly locate modules, sections, or topics based on their job function or department. While developing content, you can create a list of roles corresponding to your intended users and assign the roles to the appropriate documents. During publishing, you can tailor your output by publishing selectively to one, several, or all roles. In the Player, users can then choose from a list of available roles to display only the content that is relevant to their job function; they can also toggle to display the entire outline if necessary. You can also create document outputs, such as Training Guides, that contain information relevant to only specific roles. In addition, the assigned roles populate the Roles/Responsibility field when you publish a Business Process Document.

Working with roles in the Developer requires two basic steps: First, you create the roles, and then you assign these roles to the appropriate documents. You use the Role Editor to create

and manage roles in master role list documents. You assign roles and view role assignments at the document level through the Properties tool pane in the Library or Outline Editor. Once you assign one or more roles to a document, the role assignment is saved as a property of the document and travels with it on operations such as export and import.

Phase V: a) Train the Trainer

What is the difference between learning, teaching and doing?

- Learning is finding out what you already know.

- Teaching is reminding yourself that you know it.

- Doing is demonstrating to others that you know it.

Hence, we are all learners, teachers and doers.

A company might choose the train the trainer (TTT) approach when they prefer to have their own staff to be trainers rather then to be consultants. This has pros and cons.

If the Train the Trainer sessions are executed properly by the consultants, your organization can not only save costs by using your own instead of external staff, your trainers will be the contact person for the staff as consultants are end dated when their mission is accomplished.

You need to ensure your training needs and objectives before starting with the Train the Trainer sessions.

First of all, explain to the trainers what UPK is and the lifecycle of the UPK development. Depending on which instance you work, the scripts might to be consistent with the actual set up of the system. For example, you record a topic in CRP in September and the TTT session takes place in January and the instance has enhance set ups and master data. So the trainers must tell the end users that the Player instance might to represent 100% the Oracle Training environment which is going to be used during the training. We recommend using both an UPK and an Oracle Instance, i.e. SIT or TRAINING.

Your teachers must explain to the users how UPK will help them, how to search and access different play back modes in UPK such as See It! / Try It! / Do It! / Know It! / Print It!

You then show the documentation which is available to the teachers (training concept, training plan, player, end user documentation and roles. Explain that the same script can appear for example in 3 different roles.

Very important is the understanding of how Usage Tracking works. The teacher has to ensure that the users executed the scripts which are required in Know It Mode and that the score is captured. We recommend a manual control (i.e. Excel checklist) and the reports available from Usage tracking. The Usage Tracking tool can be used for all the playback modes, not only Know It Mode.

Ideally, your organization puts the documents required for the training on an Intranet tool such as Microsoft SharePoint. Here you should place the training pack content such as attendance forms, evaluation forms, agendas, training plan, training concept and the end user training guides.

Before you train you need to check the document and that you can successfully reproduce in the environment you have been given to teach.

Your trainer also needs to explain the logistics such as breaks, lunch, attendance sheet, evaluation form, ground rules, and manual note of know it mode scores.

During the actual training, the teacher should demo the script in a cloned Oracle environment. This is much better then just showing the script in a static Try It Mode. Often, the end user will ask questions and this gives the teacher more flexibility to actually navigate in the system, rather to squeeze the end user in a static script. If the teacher is stuck in a step in Oracle, he / she can still use the Try It Mode as a backup to show the process to the end users.

After the demo, the end user should process the script in the cloned Oracle environment using a Job Aid, which is published from UPK. This is better then using Training Guides as these can be hundreds of pages with additional content which can be used as a reference book once you go live.

The trainer should give instructions which item numbers, suppliers, Purchase Orders, etc. to use. This requires preparation of the trainer and the effort doing this is often underestimated. For example, if you run the Subledger Accounting Process, you run it once for a period and there is no big benefit having for example 10 users running this process during the training. Hence, one time processes like these should be demonstrated by the teacher that the end users can see the reports. After this, the users can run the process on their own.

Regarding Know It Mode, users are often put in a discomfort zone like being controlled or being afraid of not passing the required score, etc. To address this problem, the teacher should tell the users that they can run the scripts as many times as they want in Know It Mode until they are satisfied. You can always stop a script during Know it Mode without being scored and start from the beginning again. Hence it is vital that the trainer gives the appropriate Know It Mode instructions to the end user so that they fully understand the Usage Tracking and the trainer should keep manual notes of the scoring achieved. This will guarantee that all users processed the Know It Mode scripts in UPK.

An end user training is not a requirements workshop. If the users start to discuss the processes they need to execute, your teacher should use a parking lot, write down the issues and then address these issues to the steering committee and the PMO. Also use the parking lot if you cannot answer a question from an end user.

Your teacher should remember that because of the time lag between developing the scripts and the actual end user training, the demo of a script in Try It or See It Mode is not the same as entering the same script in a cloned Oracle environment.

Eventually, your teacher must not forget to collect the evaluation forms, manual score sheet and attendance sheet from the end users after the training session.

We have made the experience that the end user benefits much more when having a hands on experience – rather then executing a "static" script in Try It Mode. Do not allow lazy compromises executing the scripts only in Try It and Know It Mode and thinking that training is now done.

Phase V: b) End User Training

To train end-users on the system transactions, people learn in various modes. We recommend focusing on the Try It and Know It Mode. The See It Mode can be used by user and so the Play It Mode once you go live, you can use the Play It Mode as your crib when you cannot remember the process learned some weeks ago.

Organizations may base all of their training online, they may lean toward Instructor Led training in a classroom setting, or they may train their users through a combination of both

methods. When you choose the train the trainer approach, ensure that your trainers are not only familiar to Oracle but are also comfortable to teach in front of many users.

Web based training is enabled via the UPK Player. The Player output allows the end-user to watch that transaction in three modes: see it (playing back a simulated movie to get users accustomed to the new process), try it (getting the user to initiate the steps to the new process), and know it (certifying that the users indeed know the proper steps to the new process). Instructor Led training, including both instructor and student guides for a traditional classroom environment, can also be created from the same initial recording. The Job Aid output is a traditional MS Word or Adobe Acrobat document with point and click instructions and embedded screen shots.

To ensure users know how to use the system before go live, use the Know It Mode that tests/certifies the users understanding in a simulated environment. With test mode, companies can ensure their users know how to use the application correctly before go live.

Your training concept shows all the prerequisites needed to execute the actual end user training.

As a summary, you need to prepare the following for the End User Training:

- UPK scripts should be signed off after 2nd Business Review

- Republishing works properly and you have enough lead time to publish the latest content on the web server.

- Training Pack (instructions) to the trainers

- Train the Trainer documentation

- End User Training Guides (i.e. Job Aids)

- A proper Training System. Ideally a clone from the most up to date environment which has no missing set ups and a critical mass of data to use during the training.

- Site organizations such as training plans, training rooms, beamers, whiteboards, PC's are up and running, deployed content, printed documentation required for training, invitations, logistics, etc.

- Ideally, you appoint a site coordinator in each country where the end user training will be rolled out.

Go live

Once you go live with your new ERP system, you should ensure that end users can benefit from the Do It Mode in UPK. In addition to being made available at the appropriate point in a procedure, UPK content can also be linked to the application online help so end-users may have support while they are completing the actual transaction. This is called performance support or the Do It Mode. At the same, the use can work in the actual application and watch the UPK simulation to guide them in entering the information properly.

Return on Investment Sample

The below sample helps you in planning your training development and can be used as a basis for your training cost estimation or your training business plan. You can also use it for justifying when calculating the costs for buying UPK licenses and external consultant services versus the option of not using UPK for training development.

Module	No of Scripts	Define w/o UPK	Define with UPK	Record w/o UPK	Record with UPK	Update w/o UPK	Update with UPK	Total w/o UPK	Total with UPK
hours									
General Ledger	4	12	12	36	4	86	12	134	28
Payables	15	40	40	108	20	288	42	436	102
Receivables (incl. iReceivables)	11	32	32	84	16	200	31	316	79
Assets	5	12	12	42	8	96	13	150	33
Cash Management	1	4	4	12	1	14	3	30	8
EBS Tax	3	8	8	36	4	58	8	102	20
Purchasing	12	32	32	84	16	220	32	336	80
Order Management	7	20	20	54	12	134	16	208	48
Inventory	8	24	24	60	12	144	20	228	56
Process Manufacturing	10	28	28	72	12	172	28	272	68
Costing	2	4	4	16	2	36	6	56	12
Supply Chain Planning	18	48	48	132	24	340	48	520	120
Entreprise Asset Management	4	12	12	36	4	76	12	124	28
Total	**100**	**266**	**266**	**772**	**135**	**1.864**	**271**	**2.902**	**672**
in Euro (€)									
General Ledger	4	1.080 €	1.080 €	3.240 €	360 €	7.740 €	1.080 €	12.060 €	2.520 €
Payables	15	3.600 €	3.600 €	9.720 €	1.800 €	25.920 €	3.780 €	39.240 €	9.180 €
Receivables (incl. iReceivables)	11	2.880 €	2.880 €	7.560 €	1.440 €	18.000 €	2.790 €	28.440 €	7.110 €
Assets	5	1.080 €	1.080 €	3.780 €	720 €	8.640 €	1.170 €	13.500 €	2.970 €
Cash Management	1	360 €	360 €	1.080 €	90 €	1.260 €	270 €	2.700 €	720 €
EBS Tax	3	720 €	720 €	3.240 €	360 €	5.220 €	720 €	9.180 €	1.800 €
Purchasing	12	2.880 €	2.880 €	7.560 €	1.440 €	19.800 €	2.880 €	30.240 €	7.200 €
Order Management	7	1.800 €	1.800 €	4.860 €	1.080 €	12.060 €	1.440 €	18.720 €	4.320 €
Inventory	8	2.160 €	2.160 €	5.400 €	1.080 €	12.960 €	1.800 €	20.520 €	5.040 €
Process Manufacturing	10	2.520 €	2.520 €	6.480 €	1.080 €	15.480 €	2.520 €	24.480 €	6.120 €
Costing	2	360 €	360 €	1.440 €	180 €	3.240 €	540 €	5.040 €	1.080 €
Supply Chain Planning	18	4.320 €	4.320 €	11.880 €	2.160 €	30.600 €	4.320 €	46.800 €	10.800 €
Entreprise Asset Management	4	1.080 €	1.080 €	3.240 €	360 €	6.840 €	1.080 €	11.160 €	2.520 €
Total	**100**	**23.940 €**	**23.940 €**	**69.480 €**	**12.150 €**	**167.760 €**	**24.390 €**	**261.180 €**	**60.480 €**
Savings			**0%**		**83%**		**85%**		**77%**

Fig 26: UPK Business Case / Return on Investment

ROI Assumptions and Recommendations

- This sample is based on an average of 100 scripts in total. You can estimate an average of 30-40 scripts per module. However, this strongly depends on your scope and what processes needs to be recorded.

- You can average 0.5 FTE's per script (rule of thumb is 2 scripts a day) for UPK which includes face to face review / input with business (SME), actual recording, quality assurance, review and update cycles, adding procedure narrative and policy language with explanation frames.

- Developing effort varies per topic! Creating a Standard Customer in AR can take up to 300 frames, whereas opening / closing a period in AP has a couple of frames.

- Definition consists of storyboard of the cases, selecting / scope for recording from test scripts, create and maintain master file, review and update test scenarios, pre-

recordings (proof of concept) and updating the recording instance with missing set ups and master data.

- Recording includes business input, i.e. before or during recording.

- Complexity within modules varies, i.e. AP is easier than SCP.

- Average development costs estimated at € 90 per hour. Daily rate can be reduced since technical resources are not needed to create online training.

- During development, you should bring more internal resources on board for developing the UPK scripts. The external consultants should teach internal staff so that they become UPK experts and will be the people who will maintain the training tool. This also results in cost savings as you have more internal resources and less external consultants doing the development.

- Do not underestimate updating the scripts, also in UPK. The less input from business and the less accurate the test scenarios are, the more you need to spend on updating the scripts. In worst cases, you must re-record the scripts. When using traditional (non UPK) tools, manual update are a cost and time intensive process (formatting, replacing screenshots, etc.) - remember: publishing in UPK is an automated process and is a major benefit compared to creating manual training guides.

Conclusions

Training should be included in the Change Management process and is a major task for all organizations whether you plan it early enough or squeeze it before going live with your new system.

Whether you need instruction manuals for trainers, exercise books for users, a process reference book for process owners, context-sensitive user instructions, or individual online training modules, your change management process will become a less daunting task with Oracle UPK. Longer-term benefits may include decreased cost of first-line support and a faster learning cycle.

Once you have UPK in place and the training sessions have been executed, you will have central organized repository for all users, which is accessible from each site and has multi lingual support.

All available information will have the same standard (i.e. concept, 1st page, scenarios, explanation frames, last page, etc.) and can be re-used any time.

If the UPK folder structure is identical with your navigation tree in your ERP system, the users will easily find their documents. Otherwise, the online help should enable them to open the required script.
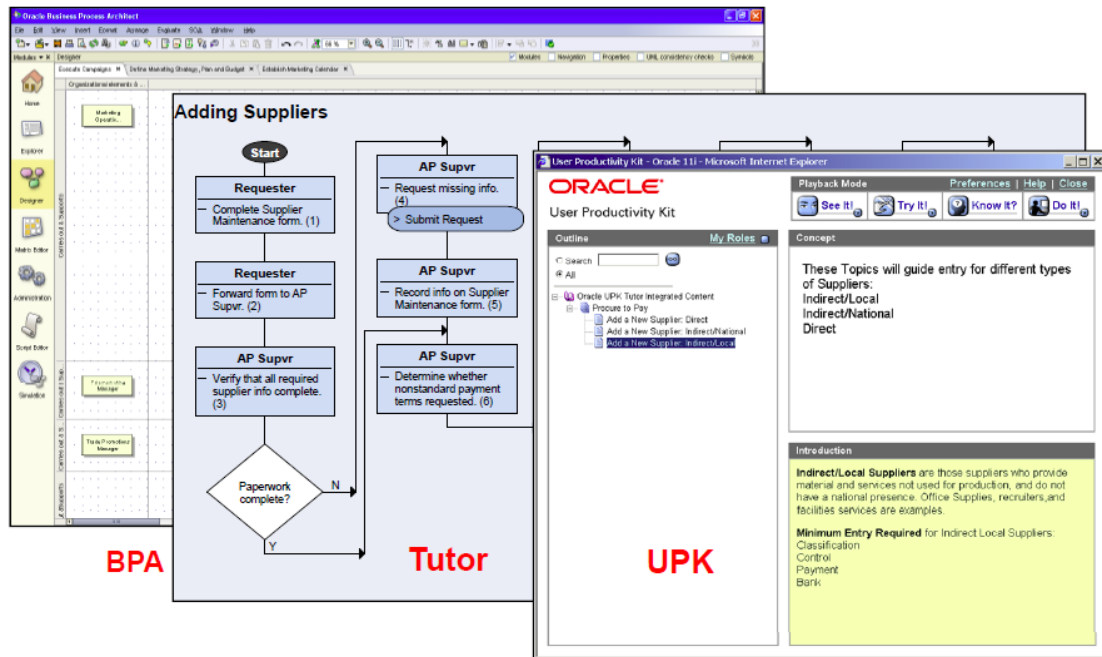
Fig 27: Using BPA, Tutor and UPK together.

Your UPK maintenance staff will easily change the scripts when processes are changed. UPK Deployment to the web server can be automated.

New employees can get familiar with the processes by using UPK.

CONTRACTORS
NETWORK

Recommendations

UPK should be a long term solution and seen as an enabling technology which brings more efficiency into your organization. UPK should not only be used for training, it should change your work forces by managing your organizational and transformational challenges.

In the beginning of your UPK project, ensure that you have the management buy in. Two out of three projects are failing when the project sponsors are not engaged. So you must get the buy in of the stakeholders.

Involve super and key users with content development.

Do not plan too long training sessions. Shorter training courses are sufficient.

To avoid that users will persist in their old and less productive way, force them to go to the on demand help and track it.

Ensure that UPK will provide consistent knowledge to the users. As people are resistant to change, they need to understand the future state.

So how can UPK help with the continuous change?

Because you can quickly capture processes and transactions in the actual future system, the users will see what is going to be the end state. These are quick wins. So you do not need to tell your entire workforce in face to face sessions what the future process will be. As UPK is system based, the focus is on the future state of the i.e. new ERP system.

Make usage of the role based mechanism, multiple language support and ensure continuity. Appoint internal staff who will be the system owners of UPK for recording new scripts and maintaining the UPK deployment.

Ensure early buy in. Negative expectations produce negative outcomes from your users.

When you develop UPK scripts, never assume that you know what is best for the users. Discuss matters with them. Benefit from the large know how from Subject Matter Experts.

Customize your scripts with company specific processes and look and feel, i.e. logos in the player package, specific policy and company language in explanation frames. As a consequence, recognizable materials generate better knowledge transfer and learning outcomes.

Help employees with the change impact and help them to improve their performance themselves. Repeated Know It Mode testing is a good starting point. Help the managers to coach their employees.

Do not accept lazy compromises. Use UPK or lose it! Keep challenging yourself and you will get better at performing complex tasks.

Remember that users need support available just when they need it, for example during a month end close or processing transactions. You can position UPK as the "internal Google" and call it the single place for all information a user needs to operate the new ERP system.

Also consider the fact that you will have a single source of an eLearning system. With UPK you actually remove the ownership of data because the single source provides help when the users need it.

How will you ensure seamless transformation?

CONTRACTORS
NETWORK

Think about how you are going to manage the impact of a future state, not only the processes but also people and organizational aspects.

Use the Know It Mode in UPK to measure if your staff has understood the new processes and if people are able to use the new system.

In addition, you can use the new features in UPK 3.6.1 such as sound editor, PowerPoint outputs, best practices and contact sensitivity. When users get help just when they need it on the screen, you will not only have increased user acceptance, you will also have the necessary level of confidence and buy in from the users.