Oracle’s User Productivity Kit (UPK) is a collaborative content development platform that drives end-user and project team productivity throughout all phases of the software ownership lifecycle. UPK pre-built application specific content provides significant additional benefit beyond the UPK Developer for enterprises deploying Oracle E-Business Suite applications.

UPK Application Content: “As Delivered” System Process References
The value of UPK pre-built application content starts from the premise that implementation project teams can save substantial time and labor by leveraging UPK application content as baseline reference system process flows first and then iterating to capture specific business process requirements. The savings can be substantial – project team resources typically dedicated to the preparation of system test data, storyboarding, and process standardization can be greatly reduced.

Mirrors Oracle Application Development Methodology
Key to the value of UPK application specific content is the fact that it is authored in tight collaboration with the actual developers who wrote the code, thus creating content which accurately reflects industry best practices with detailed conceptual information.

Delivering Value Throughout the Software Lifecycle
The value of UPK application content has relevance in many phases common to software implementation projects. For example, early on in the project lifecycle, UPK play back capabilities allow implementation leads to educate themselves on the delivered system process flows (vanilla functionality) of the new application without having to actually configure a “sandbox” environment, mitigating costs associated with labor and hardware and reducing the new functionality “learning curve.”

Eliminate Dedicated Instances To Analyze Delivered Functionality
Once the delivered functionality and process flows of the new application are understood, the project team can use the UPK content as an aid to do the fit-gap analysis. For this phase of the project lifecycle, the functional expert visually moves through a UPK simulation – leveraging the application specific content – while noting in the test document the configuration and/or customizations necessary to achieve the desired business outcome.
Customizing Pre-Built Content
Over the course of an implementation or upgrade, the UPK pre-built content can evolve until it mirrors the final deployed application. The existing pre-built content can easily be modified using the UPK Developer to capture the configuration changes or steps in the new process. UPK’s re-record feature also enables a guided recapture of screens and steps in the application so your UPK content reflects the final state of your application.

Use the UPK Developer to easily customize the content to match your organization’s needs. The UPK Content products contain the following sections:

**Asset Collections**
- Using Oracle Advanced Collections
- Interacting with Customers
- Processing Transactions
- Managing Delinquencies
- Using Dunning Plans
- Using Strategies
- Managing Collections in Leasing
- Creating Reports and Statements

**Advanced Supply Chain Planning**
- Viewing Planning Information
- Defining Plans
- Performing Collections
- Modeling the Supply Chain
- Viewing Exceptions
- Analyzing Plans
- Managing Plans
- Using Constrained and Optimized Plans
- Querying Supply Chain Plan Information
- Using Planning Strategies
- Setting Up and Defining the Distribution Plan
- Analyzing and Managing the Distribution Plan

**Asset Management**
- Setting Up EAM
- Performing Asset Setup Tasks
Using the Activity Workbench
Performing Other eAM Setup Transactions
Setting Up Non-Stock Direct Items
Setting Up Preventive Maintenance
Setting Up Work Order Billing
Using eAM Work Management
Using eAM Work Order Planning
Performing Preventive Maintenance Transactions
Using eAM Planning and Scheduling
Using eAM Cost Management
Generating eAM Cost Variance Reports
Enabling Direct Item Procurement for eAM Work Orders
Using eAM Contractor Services
Using eAM Project Manufacturing
Using Self-Service Transactions
Using the Maintenance User Workbench
Performing Maintenance Super User Transactions
Using Stores

**Assets**
Adding Asset Specifying Details (Detail Additions)
Using Asset Maintenance
Retiring Assets
Maintaining Depreciation
Maintaining Group Depreciation
Performing Online Inquiries
Performing Accounting Tasks
Using Tax Accounting
Setting Asset Controls
Running Asset Additions Reports

**Collaborative Planning**
Setting Up and Administering Collaborative Planning
Planning
Forecasting
Handling Exceptions and Notifications

**Compensation Workbench**
- Setting up Total Compensation Elements
- Setting up Payroll Elements
- Defining an Element's Input Values
- Generating Element Links
- Setting Up Compensation Workbench Plans
- Using Compensation Workbench Tasks
- Running Reports and Processes in CWB
- Entering Compensation Surveys
- Setting up Grades and Pay
- Using Individual Compensation Distribution (ICD)
- Setting up ICD for Employees and iRecruitment Applicants
- Using ICD for Line Managers, Employees and HR Professionals
- Using Compensation History
- Using Total Compensation Statements

**Complex Maintenance, Repair, and Overhaul**
- Setting Up a CMRO Organization
- Integrating with Discrete Manufacturing
- Integrating with Enterprise Asset Management
- Integrating with Logistics
- Integrating with Planning
- Integrating with Projects
- Integrating with Service
- Integrating with Order Management
- Integrating with Purchasing
- Additional CMRO Setup
- Aircraft Induction
- Heavy Maintenance Planning
- Transit and Line Maintenance
- Engine Maintenance
Heavy Maintenance Execution
Material Marshalling

**Contract Lifecycle Management for iPprocurement – Public Sector**
Using the Shop Tab
Using Line Structures
Approving a Requisition
Using and Managing Requisitions
Using the Receiving Tab

**Contract Lifecycle Management for iSupplier Portal – Public Sector**
Managing Supplier Profiles
Navigating and Searching
Viewing Award Information
Acknowledging Awards and Modifications
Viewing Shipping Information
Using the Finance Tab

**Contract Lifecycle Management for Procurement Contracts – Public Sector**
Using Contract Workbench
Using the Terms Library
Working with Contracts Expert
Working with Miscellaneous Contract Types

**Contract Lifecycle Management for Purchasing – Public Sector**
Using the Requisitions Tab
Using the Awards Tab
Creating and Using Award Modifications
Using the IDVs Tab
Using Receiving
Using the Suppliers Tab

**Contract Lifecycle Management for Sourcing – Public Sector**
Using the Requisitions Tab
Creating Solicitation Components
Creating Solicitations
Using Collaboration Scoring
Entering Contract Terms
Creating Solicitation Amendments
Receiving and Evaluating Offers
Integrating with FedBizOpps
Using the Administration Tab

**Depot Repair**
Setting Up Oracle Depot Repair
Using Oracle Depot Repair
Using the Depot Workbench
Understanding Oracle Depot Repair Business Scenarios
Using the Repair Manager Portal
Receiving Returns using the Bulk Receiving Module
Executing Repairs using the Repair Technician Module

**Discrete Manufacturing Bills of Material**
Setting Up Oracle Bills of Material
Creating and Using Bills of Material
Creating and Using Routings
Deleting Information
Defining Configure to Order Items
Defining Manufacturing Lead Times
Generating Reports and Running Processes

**Discrete Manufacturing Engineering**
Setting Up
Engineering Change Orders
Integrating Engineering Prototype data with Manufacturing data

**Discrete Manufacturing Quality**
Using Collection Elements
Setting Up Specifications
Using Collection Plans
Managing Quality Data Collection
Using the Quality Workbench
Managing Supplier Quality
Managing Manufacturing Quality
Creating Charts, Views, and Reports

**Electronic Kanban**
Setting Up Electronic Kanban
Planning Pull Sequences
Viewing Kanban Summary Information
Performing Kanban Card Actions
Viewing the Kanban Dashboard

**Field Service**
Creating Field Service Tasks and Adding Task Attributes
Understanding Skills Management
Scheduling Field Service Tasks
Managing Field Service Task Schedules
Managing Field Service Technician Trips
Receiving and Accepting Work Assignments
Debriefing Work Completion

**Financials Centralized Solution Set**
Maintaining Bank Accounts
Creating Accounting and Transfer Journal Entries to GL Programs
Using the Accounting Methods Builder
Creating Subledger Journal Entries
Running the Open Account Balances Listing
Processing Inquiries
Managing Tax Profiles and Registrations
Managing Configuration Owners and Service Providers
Setting Up Fiscal Classifications
Managing Transactions
**Fundamentals for E-Business Suite**
Getting Started with Oracle E-Business Suite
Using Forms-based Applications
Using OA Framework-based Applications
Using Help

**General Ledger**
Performing Journal Entry Transactions
Performing Online Inquiries
Defining Budgets
Managing Budget Organizations
Managing Budget Formulas
Entering Budget Amounts
Transferring Budget Amounts
Freezing Budgets
Using Encumbrance Accounting
Processing Average Balances
Using Financial Reporting
Performing General Ledger Maintenance
Using the Global Consolidation System
Managing Multi-Currencies
Managing Journal or Subledger Level Reporting Currencies
Using the Account Hierarchy Manager
Setting Up Oracle General Ledger
Generating Custom General Ledger Reports

**Global Order Promising**
Running ATP Processes
Specifying ATP Availability Options
Working With Allocation Rules
Performing ATP Inquiries

**Human Resources**
Using Organization Structures
Entering Organization Information
Creating and Maintaining Job Positions
Using Person Types and Employment Groups
Using Employment Agreements
Configuring HRMS
Setting Up Work Structures
Hiring Employees
Setting Up Employees
Managing Absences
Performing Global Deployment
Ending Employment
Managing People
Running Workforce Reports
Using People Folders and Assignments
Defining Human Resource Budgets
Setting Up Human Resources Users and Responsibilities
Using HR Help Desk

**Incentive Compensation**

Plan Administrator: Creating Top Down Plans
Plan Administrator: Managing Compensation Plans
Plan Administrator: Managing Component Libraries
Plan Administrator: Managing Product Classifications
Sales Operations: Managing Sales Crediting
Plan Administrator: Modeling Plans
Compensation Analyst: Viewing Resources
Compensation Analyst: Processing Transactions
Compensation Analyst: Processing Payment Batches
Compensation Analyst: Adjusting Transactions
Compensation Manager: Setting Up Payment Parameters
Compensation Analyst/Manager: Publishing Reports
Incentive Compensation Administrator: Using the Configuration Workbench
Incentive Compensation User: Using Manager Self Service
System Administrator: Archiving

**Install Base**
Managing Searches
Managing Item Instances in Oracle Install Base
Working with Systems
Using the Transactions Tab
Using the Mass Update Facility
Performing Oracle Install Base Related Tasks in Other Oracle Applications
Using the Open Interface Program
Purging Transaction History
Setting Up Counters
Managing Counter Instances in Oracle Install Base
Administering Counters

**Internet Expenses**
Configuring Expenses
Managing Credit Card Transactions
Using Oracle Audit Management

**Inventory**
Setting Up Oracle Inventory
Defining Item Setup and Control
Defining and Maintaining Item Information
Defining Lot Control
Defining Serial Control
Defining Material Status Control
Defining Transaction Setup
Performing Transactions
Managing On Hand Quantities and Item Availability
Using Move Orders
Defining Planning and Replenishment
Using Cost Accounting and Control
Performing an ABC Analysis
Performing Cycle Accounting
Performing a Physical Inventory

**Inventory Optimization**
- Working with an Inventory Plan
- Setting Plan Options
- Reviewing Key Setups
- Working with Queries
- Analyzing Output

**iProcurement**
- Maintaining Catalog Content
- Managing Product Presentation
- Setting Up iProcurement Users
- Reviewing User Self-Management
- Searching and Browsing
- Managing Requisitions
- Performing Basic Shopping
- Shopping: Requisition Line Editing

**iRecruitment**
- Setting Up iRecruitment Information
- Configuring iRecruitment Pages
- Managing Assessments
- Managing Vacancies
- Using Job Search Aids
- Processing Candidates
- Managing Communication
- Managing Interview Tasks
- Working with Applicants
- Using Recruitment Summaries
- Using the Employee Interface
- Managing iRecruitment for Agency Users
- Generating Letter and Reports
iSupport
Defining Home Page Content and Layout
Customizing Oracle iSupport Home Page
Using Oracle iSupport
Using Oracle Installed Base
Searching in Oracle iSupport
Changing User Profile Information
Maintaining Users
Managing Service Request Templates

iSupplier Portal
Entering Registrations
Navigating and Searching
Viewing Order Information
Viewing Shipping Information
Viewing Planning and Inventory Information
Viewing Invoice and Payment Information
Managing Supplier Profile Management
Using Buying Company View
Setting Up Supplier Users
Setting Up Suppliers

Learning Management
Setting Up Oracle Learning Management
Managing Learner Groups
Managing Administrator Groups
Using Electronic Records and Electronic Signatures
Using Catalogs
Creating Learning Paths and Certifications
Managing Content Structures
Managing Tests
Importing and Exporting Course Content
Managing Resources
Managing Pricing and Financing
Managing Enrollment
Using Self-Service Interfaces
Running OLM XML Reports

**Lease and Finance Management**
Setting Up Leases
Authoring Contracts
Invoicing to Receipt
Quoting to Termination
Performing Accounting Transactions
Performing Lease Center Operations
Performing Customer Self Service Operations

**Manufacturing Operations Center**
Setting Up the Administrator Role
Setting Up Sites
Setting Up Sustainability Aspect
Setting Up Time Dimension Hierarchies
Setting Up Equipment Dimensions
Setting Up Tags and Contextualization
Setting Up Extensible Attributes
Applying the User Role
Using the Manufacturing Operations Center Catalog
Using the Plant Manager Dashboard
Understanding the Facilities Manager Dashboard

**MES for Discrete Manufacturing**
Using the Administrator Role
Using the Operator Role
Using the Supervisor Role

**MES for Process Manufacturing**
Configuring the Administrator Role
Using the Operator Workbench
Performing Dispensing Tasks
Performing Production Supervisor Tasks

**Order Management**
Performing Order to Cash Lifecycle Procedures
Performing Order Inquiry
Creating Return Material Authorization (RMA) Types
Creating Sales Agreements
Dropping Shipments
Defining Back to Back Orders
Creating Internal Orders
Performing Actions on Orders
Tracking Changes
Performing ATP, Reservations and Scheduling
Creating Basic Pricing
Performing Order Management Processes
Using Invoicing and Payments
Managing Sales Contracts
Using the Order Information Portal

**Payables**
Maintaining Suppliers
Managing Invoices
Processing Payments
Entering and Processing Expense Reports
Processing Credit Card Transactions
Managing Payables Accounting
Managing Holds
Managing Foreign Currency
Reviewing Funds Disbursement Setup Options
Using the Funds Disbursement Process Home Page

**Payroll**
Calculating, Balancing, and Validating Payroll
Altering Payroll Results by Recalculation
Confirming Payroll Complete
Managing Payroll Payment Distribution
Calculating Distribution

**Performance Management**
Setting up Performance Management
Setting up Appraisals
Performance Management Plans
Objectives Management
Managing Appraisals
Managing Performance Management

**Price Protection**
Setting Up Price Protection
Creating Price Protection Transactions
Adjusting Price Protection Transactions
Approving Price Protection Transactions
Creating Price Protection Claims
Viewing Price Protection Transaction History
Running Reports and Concurrent Programs

**Process Manufacturing Process Costing**
Setting Up
Using Standard Costing
Using Actual Costing
Using Lot Costing
Using the OPM Landed Cost Management Integration
Copying Costs
Setting Up Subledger Accounting
Processing Period-End Costs
Using OPM Cost Management Reports

**Process Manufacturing Process Execution**
Using Firm Planned Orders
Creating and Maintaining Batches
Creating Reservations and Managing Batch Materials
Using the Ingredient Picking Workbench
Producing Batches
Completing Batches
Using Inquiries
Using the Process Execution Workbench
Using the Production Scheduler Workbench
Running Reports and Concurrent Programs

**Process Manufacturing Process Quality**
Setting Up Process Manufacturing Quality Management
Managing Test Data
Managing Specifications
Collecting Samples
Managing Results
Managing Stability Studies

**Process Manufacturing Product Development**
Setting Up Product Development
Defining Formulas
Maintaining Operations
Defining Routings
Maintaining Recipes
Working with Search and Substitution Functions
Using Least Cost Formulation

**Process Manufacturing Regulatory Management**
Setting Up Regulatory Management
Setting Up Regulatory Item Information

**Process Manufacturing System Administration**
Setting Up OPM System Administration Functions
Understanding the Migration Process
Performing Archive and Purge
Setting Up Approval Process Workflow

**Product Hub**
Setting Up the Item Catalog
Setting Up Attributes and Functions
Using Item Catalog Category Versions
Using Alternate Catalogs
Using Alternate Catalogs
Setting Up and Using Role Based Security
Managing Changes
Creating New Item Requests
Using Style and SKU Items
Setting Up and Managing Item Structures
Using the Product Workbench
Synchronizing Product Data and Managing Data Quality
Using Item Business Rules

**Project Billing**
Managing Agreement Templates
Managing Agreements and Funding
Accruing Revenue
Generating Invoices

**Project Costing**
Setting up Profile Options
Implementing Labor Costing
Using Labor Costing
Implementing Capital Projects
Implementing Capitalized Interest
Implementing Allocations
Implementing AutoAllocation
Implementing Burdening
Implementing Cross Charge - Borrowed and Lent
Implementing Expenditures
Creating Expenditures
Burdening
Using Allocations
Capitalizing Assets

Project Foundation
Implementing Nonlabor Costing
Setting Up a Project
Working with Rate Schedules
Working with Project Roles
Attaching Resource Lists
Using Planning Resource Lists
Using Resource Breakdown Structures
Using the Project Manager Responsibility
Creating and Updating Workplans
Managing Workplan Effort and Cost
Defining Jobs

Project Management
Setting Up Change Management
Working with Change Management
Setting Up Workplan
Creating and Updating Workplans
Managing Workplan Effort and Cost
Managing Programs
Integrating Microsoft Project with Oracle Projects
Setting Up Budgeting and Forecasting
Budgeting and Forecasting
Managing Issues
Managing Project Performance
Setting Up Project Status Reporting
Reporting Project Status

Project Resource Management
Defining Jobs
Setting up Resource List
Creating Team Templates
Staffing Priority Codes
Assigning Resource
Defining Advertisement Rules
Viewing Budgets and Forecasts
Reporting Project Performance
Setting up Requirement Status Profile Options
Setting up Candidate Status Profile Options
Setting up Assignment Status Profile Options
Using Project Manager Responsibility
Staffing Manager Responsibility

Purchasing
Performing the Document Approval Process
Entering Requisitions
Entering Purchase Order Agreements
Entering Purchase Orders
Entering Planned Purchase Orders
Entering Purchase Order Releases
Viewing Tax Information in Purchasing
Using the Professional Buyer's Workcenter
Receiving in Purchasing
Performing Purchasing Inquiries
Using Purchasing Approval, Security, and Control
Using Supply Base Management
Defining Automatic Sourcing
Using the Approved Supplier List
Entering Request for Quotes (RFQs)
Managing Quotations
Performing Receipt Accounting
Using Standard Purchasing Functions
Viewing Purchasing Reports
Using Engineering & Construction Enhancements
Using Pricing Transparency

Rapid Planning
Using the Workbench
Using Common Workspace Features
Using Plan Details Functionality
Managing Simulation Sets
Using Exceptions
Using Metrics
Performing Workbench Actions
Performing Simulations
Setting Up

Receivables
Managing Receipts
Managing Bills Receivable
Managing Customers
Managing Collections
Managing Documents
Performing Accounts Receivable Transactions
Managing Revenue
Using Accounting for Receivables
Using the Funds Capture Process Home Page

Self-Service Human Resources
Talent Management
Using the Common SSHR Modules
Manager Self-Service: Manager Actions
Manager Self-Service: Termination
Manager Self-Service: Maintaining Assignments
Manager Self-Service: Hiring
Employee Self-Service: Maintaining Personal Information
Using Competencies and Qualifications
Employee Self-Service: Employee Actions
**Service Contracts**
Setting Up Oracle Service Contracts
Setting Up Service Pricing and Billing
Creating Contracts
Entering Defaults for Contracts
Entering Service Lines
Entering Usage Lines
Entering Subscription Lines
Ordering Service in Oracle Order Management
Adjusting Prices
Approving Contracts
Using the Administrator Workbench to Manage Contracts Under Negotiation
Using the Customer Acceptance Portal
Extending and Renewing Contracts
Terminating Contracts
Setting Up Standard Coverage and Subscription Templates

**Service Parts Planning**
Setting Up Source and Destination Data
Defining Forecasting Rules
Collecting Source Data
Setting Plan Options
Performing Miscellaneous Planning Activities

**Shipping Execution**
Using Shipping Transactions
Searching with Query Manager
Managing Trips
Managing Deliveries
Managing Delivery Lines
Managing Containers
Using Pick Release
Using Ship Confirm
Using Shipping Exceptions
Using Oracle Workflow with Oracle Shipping Execution
Setting up Shipping Execution Steps

**Shop Floor Management**
- Defining Parameters
- Setting Up Shop Floor Management Attributes
- Managing Network Routing
- Launching Shop Floor Modeling
- Performing Shop Floor Execution: Supervisor Workbench
- Managing Operator Workstation
- Viewing Jobs
- Executing Lot Transactions
- Creating Lot and Serial Controlled Assemblies
- Launching the Resource Scheduling Workbench
- Viewing Lot Genealogy
- Specifying Co-Products
- Closing Lot Based Jobs
- Executing WIP Lot Transactions
- Transacting Material Supply

**Site Hub**
- Using the Administrator Role
- Using the Site User Role

**Sourcing**
- Adding Line Attributes to Auction or RFQ
- Applying Contract Terms to a Sourcing Document
- Copying a Sourcing Document
- Creating a Supplier Response PDF
- Creating and Managing a Sourcing Event
- Creating Awards
- Creating Negotiations
- Creating Proxy and Power Bids
- Creating Sourcing Documents using the Demand Workbench
Customizing the Sourcing Pages
Defining Service-based Lines
Managing Cost Factors
Managing RFIs
Setting up Negotiations
Supplier Response via Spreadsheet
Using Enhanced Spreadsheet Support
Using Sourcing Optimization Enhancements
Using Two-Stage RFQs
Using Weighting and Scoring when defining a Negotiation
Understanding Earnest Money Deposit

**Strategic Network Optimization**
Working With Models
Viewing and Entering Supply Chain Data
Finding and Replacing Data
Using Currency Rates in Models
Mitigating Risk
Modeling Scenarios and Events
Reporting and Extracting Data
Working With the Data Editor

**Time and Labor**
Configuring Time Cards
Defining Work Patterns
Assigning Preferences
Entering Time Cards
Approving Time Cards
Assigning Timekeeper
Processing Time Cards

**U.S. Federal Financials**
Performing Budget Execution
Using Federal Procure to Pay
Using the Prompt Payment Process
Managing Receivables
Generating Federal Financials Reports

**Warehouse Management**
Using the Oracle Warehouse Management Rules Engine
Performing Material Management
Using Task Management
Managing Inbound Logistics
Performing Crossdocking
Managing Outbound Logistics
Using Wave Planning
Label Printing and Defining Material Handling Equipment
Performing Cartonization, Consolidation, and Packing
Shipping

**Work in Process**
Setting Up Oracle Work in Process
Creating and Maintaining Jobs
Issuing Materials
Managing Resources
Performing Shop Floor Transactions
CONTACT US

For more information on UPK and application specific content for Oracle application product families go to http://www.oracle.com/goto/upk/user-productivity-kit.html.

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