UPK PRE-BUILT CONTENT FOR: PEOPLESOF9.2

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 PeopleSoft 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 “sand-box” 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:

Absence Management
Defining General Element Information
Defining Data Retrieval Elements
Defining Calculation Elements
Defining Earning and Deduction Elements
Setting Up Accumulators
Defining Processing Elements
Defining Absence Elements
Using Schedules
Defining the Organizational Structure
Using Calendars
Entering Absences
Requesting and Managing Extended Absences
Setting Up Self-Service Absence Transactions
Setting Up Overrides
Processing Absences
Viewing and Finalizing Absence Results
Transferring Leave Time
Managing Off-Cycle Processing
Using the Utilities
Generating Report Data
Setting Up and Running Generic Reports
Using Self-Service Scheduling Features for Managers
Entering and Approving Self Service Absence Requests
Running Reports
Asset Management
- Adding and Maintaining Assets
- Maintaining Parent and Child Assets
- Adjusting and Transferring Assets
- Performing Physical Inventory
- Working with Composite Assets
- Working with Leased Assets
- Working with Asset Budgeting
- Retiring Assets
- Archiving Asset Information
- Depreciating Assets
- Using User-Defined Depreciation
- Creating Accounting Entries
- Allocating Depreciation Expense
- Integrating with Other PeopleSoft Applications
- Changing Assets in Mass
- Tracking Repairs and Service
- Working with Joint Venture Processing
- Running Reports

Benefits Administration
- Benefits Administration Fundamentals
- Administering Flexible Spending Accounts
- Preparing for Event Maintenance
- Preparing Open Enrollment
- Processing Open Enrollment
- Identifying Event Triggers
- Running Event Maintenance
- Using On-Demand Event Maintenance
- Running the Snapshot Process
- Running Reports

Billing
- Maintaining Customers
- Entering Bills Online
Creating Consolidated Bills
Working with the Billing Interface
Creating Recurring Bills
Copying a Group of Bills
Researching Bills
Using Accumulations
Generating Invoices
Adjusting Bills
Generating Deferred Revenue
Generating Unbilled Revenue Accrual
Creating InterUnit Customers and Bills
Managing Installment Bills
Using Multiple Currencies
Using the Billing WorkCenter
Running Reports

**Candidate Gateway**
Searching for and Managing Job Openings
Managing the Job Application Process
Connecting Friends to Jobs

**Cash Management**
Managing Cash Positions
Managing Fees and Transfers
Managing Settlements
Processing Payments with Financial Gateway
Managing Bilateral Netting
Performing Cash Sweep
Managing Treasury Accounting Entries
Managing In-House Banking
Managing Investment Pools
Managing Facilities
Using the Treasury Dashboards
Running Reports
Contracts
Introduction to Contracts
Creating Contracts
Working with Milestones
Creating Billing Plans
Creating Revenue Recognition Plans
Booking and Managing Revenue
Amending a Contract
Renewing a Contract
Managing Accounting Distribution
Managing Contracts Billing
Creating and Managing Limits
Managing Contract Notes
Pricing Contracts
Processing Contracts Billing
Working with PeopleSoft Project Costing
Maintaining Support Teams
Managing Contracts
Working with Federal Reimbursable Agreements
Processing Prepaid Amounts
Running Reports

eBenefits
Using eBenefits
Reviewing Benefit Information
Reviewing Dependent and Beneficiary Summary Information
Processing Life Events
Managing Life Events

eBill Payment
Introducing eBill Payment
Setting Up eBill Payment
Using eBill Payment
Making Payments
Administering eBill Payment
**eCompensation Manager Desktop**
- Funding Cycles
- Allocating Compensation
- Approving Compensation Proposals
- Delegating Tasks
- Reviewing Employee's Job and Performance Information
- Reviewing Employee's Compensation History and Rewards Data
- Changing Salaries
- Changing Budgeted Salaries

**Enterprise Learning Management**
- Enterprise Learning Management Overview
- Managing Person and Organization Data
- Managing Learning Resources
- Managing Payment Methods
- Managing Learning Environments
- Creating the Learning Catalog
- Managing Classes
- Creating Class Templates
- Tracking Supplemental Learning
- Tracking Learner Progress
- Creating Curricula and Certification Programs
- Administering Enrollment and Registration
- Managing Notifications
- Managing Attendance and Grading
- Using Self-Service Features
- Running ELM Reports

**ePay**
- Managing Pay Information for PeopleSoft Payroll for North America
- Managing Pay Information for PeopleSoft Global Payroll

**ePerformance**
- Introduction to ePerformance
- Defining Performance Criteria
Generating Performance Documents
Accessing Performance Documents
Using Performance Documents
Tracking Mid-Period Progress on Documents
Nominating and Tracking Participants
Entering Evaluation Comments and Ratings
Managing Approvals
Creating and Managing Business Objectives
Performing Administrative Tasks
Using Inquiry Pages
Generating Reports in ePerformance

eProcurement
eProcurement Navigation
Performing Searches
Creating Requisitions
Item Selection Methods
Approving Requisitions
Sourcing Requisitions into Purchase Orders
Processing Purchase Orders
Changing Requisitions
Receiving and Returning Items
Maintaining Supplier Information
Running Reports

eProfile
Using PeopleSoft eProfile Transactions
Using U.S. Federal eProfile Transactions

eProfile Manager Desktop
Managing Direct Reports
Managing Direct Reports for United States Federal (USF)

eSettlements
Setting Up the Buyer Direct Model
Processing The Buyer Direct Model
Creating Dynamic Discounting
Viewing the Buyer and Supplier Dashboard
Resolving Invoice Disputes

**Expenses**
Maintaining Employee Profiles
Preparing Travel Authorizations
Preparing Cash Advances
Preparing Expense Reports
Processing Expense Report Exceptions
Preparing Time Reports and Time Adjustments
Using Commitment Control With Expenses
Managing Approvals in Expenses
Processing Expense Payments
Viewing Accounting Transactions in Expenses
Running Reports

**Fundamentals for FSCM**
Navigating Overview
Using Keys and Search Pages
Working with Pages
Adding and Updating Data
Using PeopleSoft Workflow

**Fundamentals for HCM**
Navigating Overview
Using Keys and Search Pages
Working with Pages
Adding and Updating Data
Using PeopleSoft Workflow

**General Ledger**
Setting Up User Preferences
Managing Journal Entries
Processing Journals
Using Commitment Control
Using Open Item Accounting
Using Interunit/Intraunit Accounting
Processing Multiple Currencies
Processing Allocations
Maintaining Budgets
Calculating Average Balances
Managing Interim and Year-End Processing
Running Reports
Using the General Ledger WorkCenter

**Global Payroll Core**
Defining General Element Information
Defining Data Retrieval Elements
Defining Calculation Elements
Defining Earning and Deduction Elements
Setting Up Accumulators
Defining Absence Elements
Using Schedules
Defining the Organizational Structure
Defining Processing Elements
Using Calendars
Working with Positive Input
Setting Up Self-Service Absence Transactions
Setting Up Overrides
Processing Payroll
Viewing and Finalizing Payroll Results
Managing Off-Cycle Processing
Entering Absences
Using the Utilities
Generating Report Data
Setting Up and Running Generic Reports
Using Self-Service Scheduling Features for Managers
Entering and Approving Self Service Absence Requests
Defining Banking Instructions
Running Reports

**Grants**
- Preparing and Submitting Proposals
- Managing Cost Sharing
- Managing Awards and Projects
- Applying Transactions to Grants
- Preparing and Submitting a Protocol
- Managing Award Billing
- Managing Award Revenue
- Managing Advances
- Establishing Continuation Proposals
- Performing the Award Close Out Process
- Using the Grants WorkCenter
- Running Reports

**HelpDesk for Human Resources**
- Searching for Cases
- Creating New Cases
- Working with and Editing Cases
- Working with the HR Service Center
- Working with the HR Worker 360 Degree View

**Human Resources**
- Manage Positions
- Maintaining Profile Data
- Tracking Employee Competencies
- Comparing Employees to Roles
- Adding a Person
- Increasing the Workforce
- Entering Additional Data in HR Records
- Managing Grievances and Disciplinary Actions
- Updating Person and Job Information
- Managing Compensation
- Viewing Summary Workforce Information
Accessing Org Chart Viewer Information
Maintaining Health and Safety Data
Managing Health and Safety Issues
Managing Absence
Managing Vacations
Setting Up Administer Training
Enrolling in Courses
Budgeting Student Training
Calculating Tenure
Tracking Events
Managing Cases
Base Benefits Fundamentals
Managing Benefits
Administering COBRA Benefits
Benefits Calculations
Benefits Billing
Managing Multiple Jobs
Administering FMLA
Managing Eligibility and Proration
Managing Plans with Weighted Goals
Managing Plans with Matrix Goals
Funding Variable Compensation Plans and Groups
Calculating Allocations and Awards
Managing Awards Approval and Payouts
Setting Up Benefit Information
Setting Up Company Car Fleet Information
Managing Company Cars
Calculating Car and Fuel Benefit Amounts
Planning Careers
Succession Planning
Defining Employee Qualifications
Tracking Global Assignments
Managing Expenses and Educational Allowances
Running HCM 9.2 Reports
Inventory
Setting Up Inventory Facility Structure
Setting Up Inventory Items
Maintaining Containers
Stocking Material (Putaway)
Setting Up Demand Fulfillment
Creating Material Stock Requests
Reserving Inventory
Managing Stock Shortages
Picking Inventory
Shipping Inventory
Replenishing Inventory
Transferring Stock
Fulfilling Work Orders from Maintenance Management
Managing Consigned Purchases Inventory
Using Vendor Managed Inventory
Counting Inventory Stock
Maintaining Par Locations
Maintaining Inventory
Running Reports
Using the Supply and Demand WorkCenter

Online Marketing
Creating an Audience
Designing Email Documents
Designing Web Documents
Working with Web Templates
Designing Online Dialogs
Designing the Dialog Flow
Deploying and Managing Online Dialogs
Using the Control Center
Analyzing Online Dialogs
Order Management
Introducing Order Management
Maintaining Customers
Establishing Products and Items
Defining Transportation and Freight
Creating Communications
Establishing Holds
Creating Pricing Adjustments
Setting up Customer Price Books
Creating Sales Orders
Using Advanced CSR Options
Creating Sales Quotes
Defining Buying Agreements
Creating Counter Sales Orders
Using Express Order Entry
Defining Return Material Authorizations
Defining Order Bills
Running Reports

Payables
Maintaining Suppliers
Entering Vouchers
Managing Vouchers
Using Control Groups
Establishing Recurring Voucher Contracts
Processing Payments
Running Batch Processes
Running Inquiries
Using WorkCenters and Dashboards
Running Reports

Payroll for North America
Introduction to PeopleSoft Payroll for North America
Setting Up Employee Data
Processing Garnishments
Administering Contract Pay (E&G)
Working with Paysheets
Performing Pay Calculation
Performing Pay Confirmation
Working with Checks and Direct Deposits
Processing Periodic Payroll Events
Processing Tips Data
Processing Retroactive Pay
Processing Retroactive Benefits and Deductions
Adjusting Employee Balances
Generating a Canadian Record of Employment (ROE)
Generating and Viewing IRR and ROST Reports (USF)
Running Reports

**Project Costing**
Introduction to Project Costing
Maintaining Projects
Analyzing Projects
Using Project Trees
Pricing Project Costs
Managing Resource Transactions
Project Costing Integration
Project Costing Integration with Asset Management
Project Costing Integration with General Ledger
Project Costing Integration with Procurement
Project Costing Integration with Time and Labor
Project Costing Integration with Expenses
Project Costing Integration with Third-Party Applications
Using WorkCenters and Dashboards
Running Reports

**Purchasing**
Maintaining Supplier Information
Managing Items
Managing Requests for Quotes
Managing Vendor Rebates
Managing Requisitions
Changing Requisitions
Using Commitment Control
Administering Purchase Order Contracts
Creating Purchase Orders
Processing Purchase Orders
Managing Purchase Order Change Orders
Managing Purchase Orders
Managing Vendor Returns
Managing Receipts
Using Procurement Cards
Analyzing Procurement
Running Reports
Using WorkCenters and Dashboards

**receivables**
Introducing Receivables
Maintaining Customers
Entering Receivables
Entering Payments
Applying Payments
Reviewing Payments
Using Payment Predictor
Managing Account Aging
Managing Credit, Collections, and Exceptions
Maintaining Receivables
Updating Receivables
Transferring Receivables
Processing Exceptions and Collections
Processing Multiple Currencies in Receivables
Interfacing with U.S. Federal Systems
Using the Receivables WorkCenter
Running Reports
ORACLE DATA SHEET

Reporting Tools for FSCM
PS/nVision Basics
PS/nVision Reporting on the Web
PeopleSoft Query Basics
Defining Query Selection Criteria
Advanced Query Options
Creating BI Publisher Reports

Reporting Tools for HCM
Creating BI Publisher Reports
Performing PeopleSoft Query Basics
Defining Query Criteria

Reporting Tools for PeopleTools 8.53
Accessing PS/nVision
Using Layouts
Using Report Scopes
Using PS/nVision DrillDown
Using nPlosion
Running PS/nVision Reports on the Web
Running PS/nVision Reports in the Microsoft Windows Client
Understanding Process Scheduler
Submitting Process Requests
Using Process Monitor
Using Report Manager
Using Reporting Console
Creating and Running Simple Queries
Modifying, Scheduling, and Organizing Queries
Filtering Output with Criteria
Filtering Output with Runtime Prompts
Creating Expressions
Using Summary Calculations
Using Subqueries
Working with Unions
Performing Joins
Using Connected Query
Creating BI Publisher Reports
Understanding Query-based Pivot Grids
Using Pivot Grid Wizard
Using Pivot Grid Pagelets
Performing Pivot Grid Administrative Tasks

**Strategic Sourcing**
Using PeopleSoft Strategic Sourcing Project Plans
Creating Bid Factors
Creating Events
Using Event Collaboration
Managing Events
Registering and Maintaining Bidders
Placing and Managing Bids
Analyzing Bids and Awarding Events
Using Optimization
Negotiating Events Using Multiple Rounds and Versions
Using the Supplier Administration WorkCenter
Registering Suppliers Online
Running Reports

**Supplier Contract Management**
Understanding PeopleSoft Supplier Contract Management
Creating a Contract Document - The Basics
Using the Document Management Page
Working with Contract Agreements
Working with the Contract Library
Running Reports

**Support**
Searching for Cases
Creating New Cases
Working with and Editing Cases
Working with the Customer 360-Degree View

**Talent Acquisition Manager**
Using Recruiting Pagelets, Pivot Grids, and the Recruiting Home
Creating Job Openings
Searching for and Managing Job Openings
Managing Job Postings
Entering Applicant Data
Searching for Applicants
Managing Applicants
Searching for and Managing Applications
Screening and Routing Applicants
Interviewing Applicants
Making Job Offers
Hiring Applicants
Performing Applicant Actions
Managing Resumes
Managing Employee Referral Programs

**Test Framework 8.53**
Understanding PTF Technology
Installing and Configuring PTF
Creating Tests and Test Cases
Developing Tests
Optimizing Tests
Incorporating Scroll Handling
Identifying Change Impacts

**Time and Labor**
Managing Work Schedules
Managing Time Reporter Data
Approving and Managing Time
Establishing Static and Dynamic Groups
Using Self-Service Components
Using Manager Self-Service Components
Loading Payable Time into Payroll and Running Payroll

Using the Time and Labor WorkCenter

Running Reports

CONTACT US

For more information on UPK and application specific content for Oracle application product families go to http://www.oracle.com/us/products/applications/user-productivity-kit/overview/index.html.

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