

# Integrating Tutor and UPK Content: A Complete User Documentation Solution

*An Oracle White Paper*  
*January 2007*

# Integrating Tutor and UPK Content: A Complete User Documentation Solution

## TUTOR OR UPK?

Oracle has a robust set of user documentation tools supporting application adoption: Tutor and User Productivity Kit (UPK). Customers frequently ask what the strengths and uses of these tools are. The goal of this paper is to explain:

- The various user documentation types
- User documentation created with Tutor
- User documentation created with UPK
- When to create the various types of user documentation during an applications implementation project

Once these points are understood, it becomes clear that companies who use any of the Oracle business applications can benefit from using Tutor and UPK together.

**KBACE Technologies uses Oracle's Tutor and UPK to quickly create user documentation supporting an effective adoption process during the implementation of Oracle Applications. By greatly streamlining the documentation effort, these two tools give KBACE the ability to develop accurate training material throughout the Conference Room Pilot process. Our customers become productive in the new applications quickly, and are given the ability to maintain the user materials for performance support long after go live.**

**Don Kisiday  
Senior Vice President of Consulting  
Services, KBACE Technologies.**

## INTRODUCTION

User documentation is defined as content that guides members of organizations in the authorized way to perform their work. User documentation includes processes (business flows), procedures, instructions, system instructions, system navigation simulations, training presentation materials, and support documents. The *Tutor Implementation Guide* describes in more detail the differences between each of these document types.

## Why Create User Documentation?

Accurate and consistent user documentation supports an organization's ability to successfully implement, use, and maintain its business applications. Ultimately, user documentation is a productivity enhancement. By creating effective user documentation, companies can ease the following business pressures:

- Increase staff productivity
- Implement new or upgrade existing applications
- Reengineer or improve business practices
- Train new hires or new users

- Support users in a production environment
- Develop and deploy company standards, codes of conduct, ethical practices, and statutory and regulatory policies
- Comply with regulatory/quality programs (Sarbanes-Oxley, ISO 9000, etc.)
- Reduce audit costs

## **ORACLE SOLUTION**

For companies wishing to relieve these business pressures, Oracle offers a solution that streamlines the creation of the various types of user documentation. The solution comprises Oracle Tutor and UPK, which are product agnostic and can be used by companies who use any of the Oracle business applications.

### **Oracle Tutor**

**Tutor** provides content and software tools to easily modify, create and maintain written business process documentation – business flows, policies, procedures, and support documents. This process documentation contains the type of information ISO 9000 and SOX auditors require when certifying companies who are trying to achieve compliance in these areas. Tutor documents are deployed as HTML sourced from a server environment for training or from the application environment as living productivity aids.

User Documentation created with Tutor (people to people)

- Business Flows (cross-functional sequences of procedures)
- Procedures (multi-role work instructions)
- Instructions (single-role work instructions)
- Support documents (reference documents and form abstracts)

### **Oracle UPK**

**UPK** picks up where Tutor leaves off, providing content and software tools to capture and play back the exact steps a user would use to enter data in a formal business application. For online training, users can use the simulation playback to be trained and tested on their understanding of how to complete system transactions that are part of their daily job. UPK content may be linked from Tutor procedures for live, in context, performance support. Tutor content may be linked from UPK simulations and documentation to provide information to the user as to where they are in the business process.

User Documentation created with UPK (people to system)

- System Transaction Simulations (data entry and other steps an individual performs in an application)
- Job aids / Navigation instructions

- Classroom Training Guides
- Web Based Training
- User acceptance test scripts

## **DEVELOPING TUTOR AND UPK CONTENT**

User documentation is a critical deliverable of an application implementation, used to train employees in the correct use of systems. The next few paragraphs define some common implementation activities, the people resources required, and the timing of the development of the user documentation.

### **Implementation Activities**

Application implementations are typically managed in phases, with Conference Room Pilot (CRP) activities being conducted throughout the phases. Oracle Unified Method describes these phases as:

- Inception
- Elaboration
- Construction
- Transition
- Production

The Conference Room Pilot cycle is a series of workshops whereby the specific use of generic systems is defined for the implementing organization. CRP workshops include the following approaches to business processes and data:

- CRP1: Oracle business processes, Oracle data.
- CRP2: Oracle business processes, implementing organization data.
- CRP3: Implementing organization business processes & data.
- UAT: User acceptance testing (via test scripts).

Oracle has found that the best practice approach to developing user documentation is to integrate this work with the CRP cycle. As the applications functional specialists work together with the implementing organization business specialists, the approved use of the new application is developed. When this use is documented during CRP, accurate, detailed, and appropriate work instructions are the result.

### **User Documentation Team Members**

To create quality user documentation, it is important to assemble an effective documentation team. Choose a strong Project Management Leader and staff the documentation planning team with management members from cross functional

groups. Make sure team members have the responsibility – and the authority – to make things happen.

The winning team should consist of the following roles:

- Documentation Project Manager
- Document Owners (one for each functional area)
- Document Controller

The *Tutor Implementation Guide* has complete job descriptions for these roles.

### When to Create the Appropriate User Documentation

The table below shows when to use Tutor and when to use UPK to create the various user documentation types.

Implementation Phase	CRP	User Documentation	Documentation Tools
Inception	CRP1	Begin business flows	Tutor
		Begin procedures	Tutor
Elaboration	CRP2	Refine business flows	Tutor
		Refine procedures	Tutor
		Begin simulations and test scripts	UPK
Construction	CRP3	Refine procedures	Tutor
		Refine simulations and test scripts	UPK
		Link procedures and simulations	Tutor, UPK
		Create training materials	PowerPoint, Tutor, UPK
Transition	UAT	Refine test scripts	UPK
		Refine training materials	PowerPoint, Tutor, UPK
Production		Revisions based on changing conditions	Tutor, UPK

Best practice is to develop and refine user documentation types throughout the conference room pilot cycles and to refine and publish through to the transition phase. Procedure content benefits from refinement during each CRP cycle, while simulation content is best developed once organization specific data is available to the developers. The combination and integration of the user documentation created by both Tutor and UPK can then be used to train the user community at go-live and beyond.

## **CONCLUSION**

Because of the different user documentation types required in an implementation (and for on-going use), Tutor and UPK offer companies a solution with no overlap. Using the tools together streamlines the documentation effort for any company needing to provide a complete user documentation solution for their employees.

The *Tutor Implementation Guide* contains extensive information on this best practice methodology of creating the appropriate user documentation.



Integrating Tutor and UPK Content: A Complete User Documentation Solution

January 2007

Author: Emily Chorba

Contributing Author: Chuck Jones, Beth Renstrom

Oracle Corporation  
World Headquarters  
500 Oracle Parkway  
Redwood Shores, CA 94065  
U.S.A.

Worldwide Inquiries:  
Phone: +1.650.506.7000  
Fax: +1.650.506.7200  
[oracle.com](http://oracle.com)

Copyright © 2007, Oracle. All rights reserved.

This document is provided for information purposes only and the contents hereof are subject to change without notice.

This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission. Oracle, JD Edwards, PeopleSoft, and Siebel are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.