



# MindStream Analytics

## Introduction to Oracle User Productivity Kit



1.27.12

# AGENDA

- About MindStream Analytics
- Objectives of the Webinar
- What is UPK?
- UPK Player Modes
- Content Developer
- Document Outputs & Additional Features
- Demonstration
- Q&A



# About MindStream Analytics



- HQ – Boston, MA with national reach
- Specialize in the implementation and optimization of best of breed Oracle | Hyperion solutions.
- Our people average over 9 years of experience in the BI or BPM space
- Oracle Gold Partner
  - OAUG Hyperion SIG Essbase Domain Lead
  - Hyperion Specialization
- Visit us at [www.mindstreamanalytics.com](http://www.mindstreamanalytics.com)



**Specialized**  
Oracle Hyperion Planning

# Presenters



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# Objectives of the Webinar

Attendees will learn about:

- Introduction to Oracle UPK for Hyperion Applications
- Using the Content Developer
- Content Deployment and UPK Player Modes
- Topic Editor, Documentation Outputs, and Additional Features
- Demonstration of tool

# Oracle User Productivity Kit (UPK)



Oracle User Productivity Kit (UPK) is an easy-to-use and comprehensive content development, deployment, and maintenance platform for increasing user productivity and enterprise training effectiveness. Oracle UPK supports applications from Oracle, SAP, and Microsoft as well as custom applications.

Content development can be purely application specific or accommodate a well balanced mix of business process. Furthermore, Oracle UPK can assist in documentation output through a variety of formats, as well as enable organizational readiness through user tracking and competency measurement.

# What is User Productivity Kit?



- Single Source of Content Development
  - Interactive Simulations
  - Standardized Documentation Style
- Online and Paper Based Documentation Output
  - On Demand Computer Based Training
  - System Process Documents
  - User Acceptance Test Scripts
  - Job Aids, etc.
- GOAL – Enable End User Adoption
  - Users Understand What They Need To Do

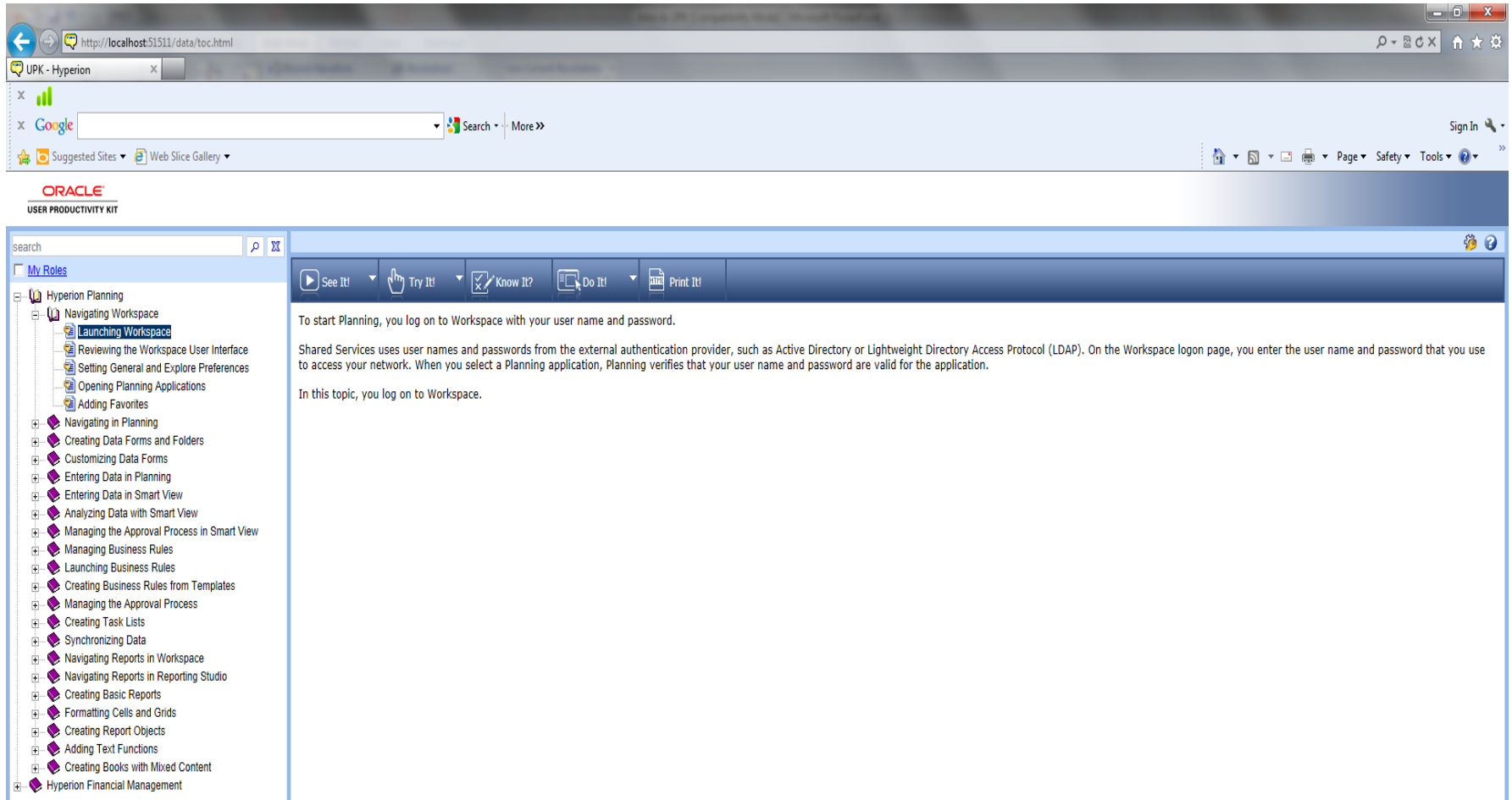
# Oracle User Productivity Kit



*Single recording produces multiple outputs for use throughout the entire software lifecycle*



# UPK Content Player



UPK - Hyperion

Google Search

Sign In

ORACLE  
USER PRODUCTIVITY KIT

search

My Roles

Hyperion Planning

- Navigating Workspace
  - Launching Workspace**
  - Reviewing the Workspace User Interface
  - Setting General and Explore Preferences
  - Opening Planning Applications
  - Adding Favorites
- Navigating in Planning
- Creating Data Forms and Folders
- Customizing Data Forms
- Entering Data in Planning
- Entering Data in Smart View
- Analyzing Data with Smart View
- Managing the Approval Process in Smart View
- Managing Business Rules
- Launching Business Rules
- Creating Business Rules from Templates
- Managing the Approval Process
- Creating Task Lists
- Synchronizing Data
- Navigating Reports in Workspace
- Navigating Reports in Reporting Studio
- Creating Basic Reports
- Formatting Cells and Grids
- Creating Report Objects
- Adding Text Functions
- Creating Books with Mixed Content
- Hyperion Financial Management

See It! Try It! Know It! Do It! Print It!

To start Planning, you log on to Workspace with your user name and password.

Shared Services uses user names and passwords from the external authentication provider, such as Active Directory or Lightweight Directory Access Protocol (LDAP). On the Workspace logon page, you enter the user name and password that you use to access your network. When you select a Planning application, Planning verifies that your user name and password are valid for the application.

In this topic, you log on to Workspace.

# UPK Player Modes



**See It** – Animated demonstration

**Try It** – Interactive simulation

**Know It** – Interactive assessment

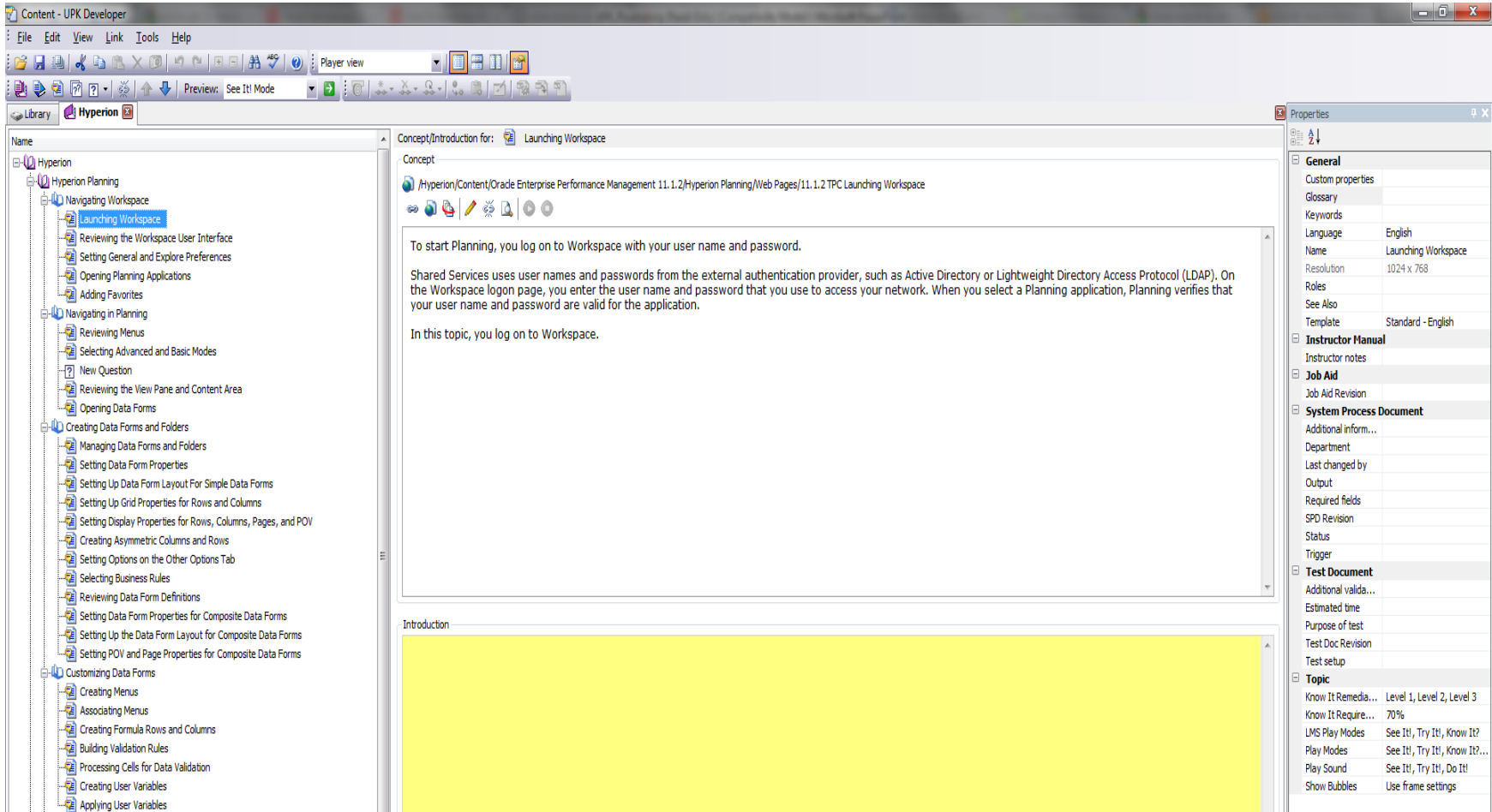
**Do It** – Interactive support live in application

**Print It** – Reference documentation

# UPK Content Developer

- Synchronized platform for creation of all UPK content
- Makes creating and publishing content easy
- Allows for single user or multi-user development
- Preview content before publishing

# UPK Content Developer



The screenshot displays the UPK Content Developer application window. The interface includes a menu bar (File, Edit, View, Link, Tools, Help), a toolbar, and a 'Player view' dropdown. A 'Library' pane on the left shows a tree structure under 'Hyperion' with various planning topics. The main content area is titled 'Concept/Introduction for: Launching Workspace' and contains text about logging into the workspace. A 'Properties' pane on the right lists metadata for the content.

**Library**

- Hyperion
  - Hyperion Planning
    - Navigating Workspace
      - Launching Workspace
      - Reviewing the Workspace User Interface
      - Setting General and Explore Preferences
      - Opening Planning Applications
      - Adding Favorites
    - Navigating in Planning
      - Reviewing Menus
      - Selecting Advanced and Basic Modes
      - New Question
      - Reviewing the View Pane and Content Area
      - Opening Data Forms
    - Creating Data Forms and Folders
      - Managing Data Forms and Folders
      - Setting Data Form Properties
      - Setting Up Data Form Layout For Simple Data Forms
      - Setting Up Grid Properties for Rows and Columns
      - Setting Display Properties for Rows, Columns, Pages, and POV
      - Creating Asymmetric Columns and Rows
      - Setting Options on the Other Options Tab
      - Selecting Business Rules
    - Reviewing Data Form Definitions
      - Setting Data Form Properties for Composite Data Forms
      - Setting Up the Data Form Layout for Composite Data Forms
      - Setting POV and Page Properties for Composite Data Forms
    - Customizing Data Forms
      - Creating Menus
      - Associating Menus
      - Creating Formula Rows and Columns
      - Building Validation Rules
      - Processing Cells for Data Validation
      - Creating User Variables
      - Applying User Variables

**Concept/Introduction for: Launching Workspace**

- Concept

Hyperion/Content/Oracle Enterprise Performance Management 11.1.2/Hyperion Planning/Web Pages/11.1.2 TPC Launching Workspace

To start Planning, you log on to Workspace with your user name and password.

Shared Services uses user names and passwords from the external authentication provider, such as Active Directory or Lightweight Directory Access Protocol (LDAP). On the Workspace login page, you enter the user name and password that you use to access your network. When you select a Planning application, Planning verifies that your user name and password are valid for the application.

In this topic, you log on to Workspace.

**Properties**

General	
Custom properties	
Glossary	
Keywords	
Language	English
Name	Launching Workspace
Resolution	1024 x 768
Roles	
See Also	
Template	Standard - English

Instructor Manual	
Instructor notes	

Job Aid	
Job Aid Revision	

System Process Document	
Additional Inform...	
Department	
Last changed by	
Output	
Required fields	
SPD Revision	
Status	
Trigger	

Test Document	
Additional valida...	
Estimated time	
Purpose of test	
Test Doc Revision	
Test setup	

Topic	
Know It Remedia...	Level 1, Level 2, Level 3
Know It Require...	70%
LMS Play Modes	See It!, Try It!, Know It?
Play Modes	See It!, Try It!, Know It?...
Play Sound	See It!, Try It!, Do It!
Show Bubbles	Use frame settings

# Content Developer – Major Components

- Content Library
  - Central repository of all content organized by folders similar to Windows Explorer.
- Outline Editor
  - Links documents from the library into a hierarchy similar to a table of contents.
    - Module
      - Section
        - Topic (Recorded Simulations)
- Topic Editor
  - Allows you to edit the frames you have recorded for a topic.

# UPK Content Developer - Library

Content - UPK Developer

File Edit View Tools Help

Details view

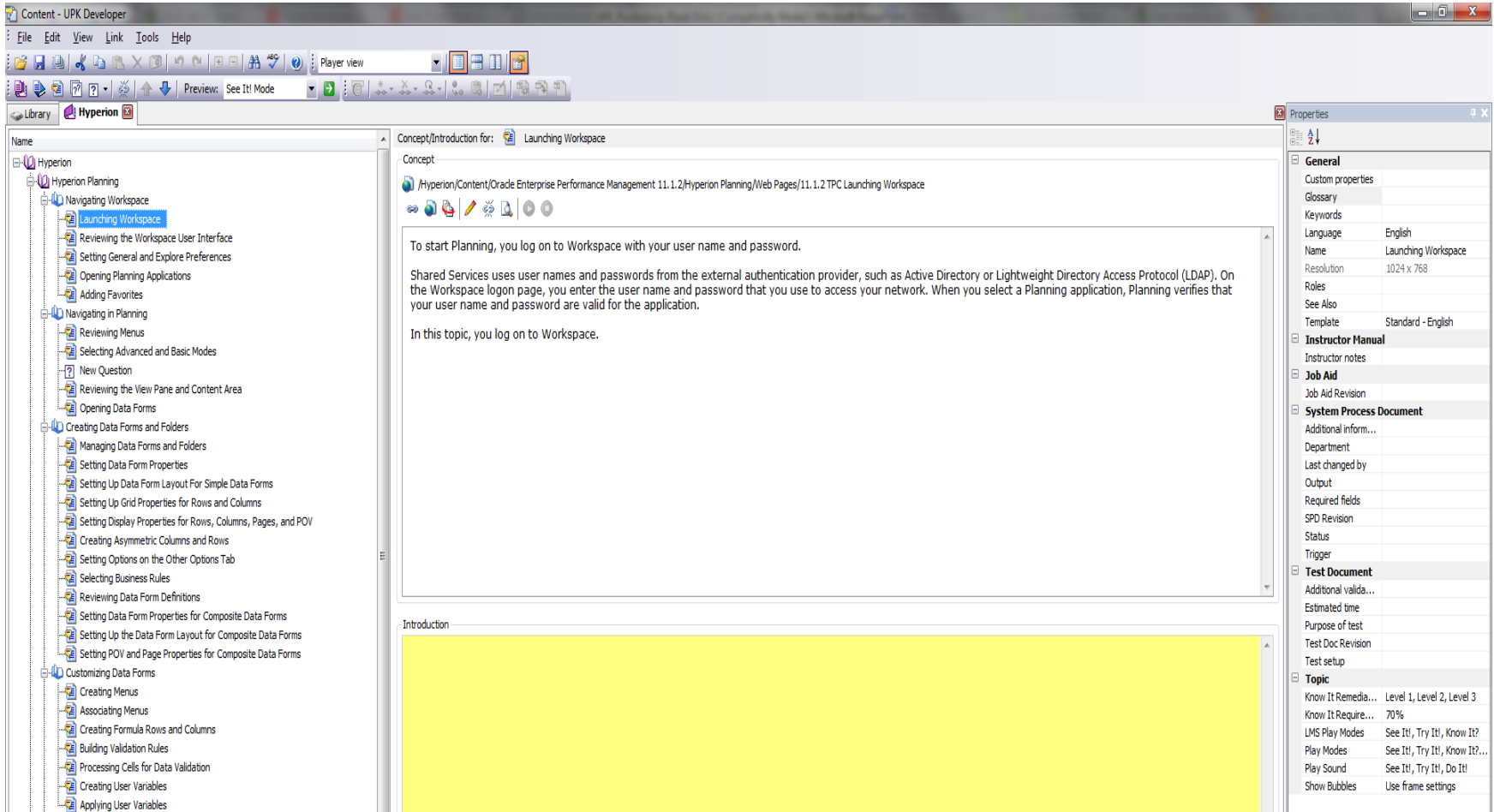
Library Hyperion

Folders

- /
- Getting Started with UPK
- Content
- Hyperion
  - Content
    - Oracle Enterprise Performance Management 11.1.2
      - Hyperion Financial Management
      - Hyperion Planning
      - Web Pages
- System
  - Assessment Templates
  - Icons
  - Installed Content
  - Publishing
  - Question Templates
  - Roles
  - Templates

Name	Last Modified Date	Type	Roles
Web Pages			
Accessing the Smart View Ribbon	1/26/2012 12:14:45 PM	Topic	Smart View U...
Adding Cell and Account Annotations	1/26/2012 12:15:52 PM	Topic	
Adding Conditional Statements	1/26/2012 12:15:45 PM	Topic	
Adding Favorites	1/26/2012 12:16:14 PM	Topic	
Adding Formulas and Preserving Formatting	1/26/2012 12:14:32 PM	Topic	Smart View U...
Adding Images	1/26/2012 12:16:15 PM	Topic	Financial Rep...
Adding Planning Unit Annotations	1/26/2012 12:14:45 PM	Topic	
Adding Related Content to Reports	1/26/2012 12:15:01 PM	Topic	Financial Rep...
Adding Report Information Functions	1/26/2012 12:15:11 PM	Topic	Financial Rep...
Adding Rows or Columns	1/26/2012 12:14:38 PM	Topic	Financial Rep...
Adding Supporting Detail	1/26/2012 12:16:18 PM	Topic	
Adding Tasks to Task Lists	1/26/2012 12:15:26 PM	Topic	
Adding Text Functions	1/26/2012 12:14:28 PM	Section	Financial Rep...
Adding the Annotation and Footnote Functions	1/26/2012 12:14:30 PM	Topic	Financial Rep...
Adding the CellText Function	1/26/2012 12:15:03 PM	Topic	Financial Rep...
Adding the GetCell Function	1/26/2012 12:14:34 PM	Topic	Financial Rep...
Adding the MemberName and MemberAlias Funct...	1/26/2012 12:14:36 PM	Topic	Financial Rep...
Adding the PlanningAnnotations Function	1/26/2012 12:14:43 PM	Topic	Financial Rep...
Adding Validation Rules to Stop Planning Unit Pro...	1/26/2012 12:14:46 PM	Topic	
Adding Validation Rules to Update the Promotion...	1/26/2012 12:14:42 PM	Topic	
Adjusting Plan Data	1/26/2012 12:16:23 PM	Topic	
Analyzing Data with Smart View	1/26/2012 12:14:28 PM	Section	Smart View U...
Annotating Planning Units	1/26/2012 12:14:33 PM	Topic	Smart View U...
Applying Dynamic Data Points	1/26/2012 12:16:18 PM	Topic	Smart View U...
Applying Formulas to Data Forms	1/26/2012 12:14:53 PM	Topic	Smart View U...
Applying User Variables	1/26/2012 12:16:07 PM	Topic	
Approving Planning Units	1/26/2012 12:14:54 PM	Topic	
Assigning Business Rule Security	1/26/2012 12:14:43 PM	Topic	
Associating Menus	1/26/2012 12:14:55 PM	Topic	
Attaching URLs and Workspace Documents to Cells	1/26/2012 12:16:19 PM	Topic	
Browsing the Repository	1/26/2012 12:15:44 PM	Topic	
Building Task Lists	1/26/2012 12:15:14 PM	Topic	
Building Validation Rules	1/26/2012 12:16:11 PM	Topic	
Calculating Currencies with the Calculate Curren...	1/26/2012 12:16:13 PM	Topic	
Calculating Data	1/26/2012 12:16:11 PM	Topic	Smart View U...
Calculating Data with the Calculate Data Form Sc...	1/26/2012 12:14:31 PM	Topic	

# UPK Content Developer - Outline



The screenshot displays the UPK Content Developer application interface. The left pane shows a tree view of the content structure, with 'Hyperion' expanded. The central pane shows the 'Launching Workspace' concept, which includes a description of the workspace and a list of topics. The right pane shows the 'Properties' panel for the selected concept, displaying various metadata fields.

**Hyperion**

- Hyperion Planning
  - Navigating Workspace
    - Launching Workspace
    - Reviewing the Workspace User Interface
    - Setting General and Explore Preferences
    - Opening Planning Applications
    - Adding Favorites
  - Navigating in Planning
    - Reviewing Menus
    - Selecting Advanced and Basic Modes
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    - Setting Up Grid Properties for Rows and Columns
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**Concept/Introduction for: Launching Workspace**

- Concept

Hyperion/Content/Oracle Enterprise Performance Management 11.1.2/Hyperion Planning/Web Pages/11.1.2 TPC Launching Workspace

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In this topic, you log on to Workspace.

**Introduction**

**Properties**

General	
Custom properties	
Glossary	
Keywords	
Language	English
Name	Launching Workspace
Resolution	1024 x 768
Roles	
See Also	
Template	Standard - English

Instructor Manual	
Instructor notes	

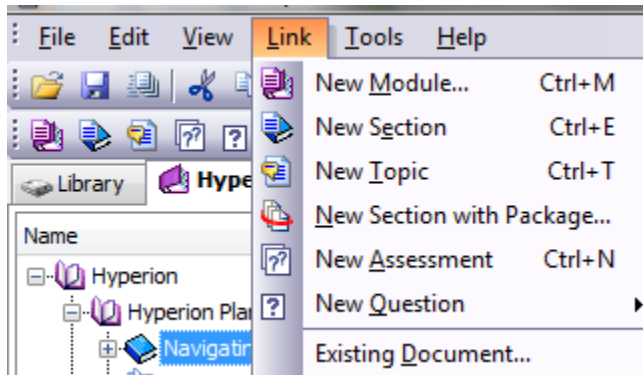
Job Aid	
Job Aid Revision	

System Process Document	
Additional Inform...	
Department	
Last changed by	
Output	
Required fields	
SPD Revision	
Status	
Trigger	

Test Document	
Additional valida...	
Estimated time	
Purpose of test	
Test Doc Revision	
Test setup	

Topic	
Know It Remedia...	Level 1, Level 2, Level 3
Know It Require...	70%
LMS Play Modes	See It!, Try It!, Know It?
Play Modes	See It!, Try It!, Know It?...
Play Sound	See It!, Try It!, Do It!
Show Bubbles	Use frame settings

# UPK Content Developer – Outline



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.



## 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.

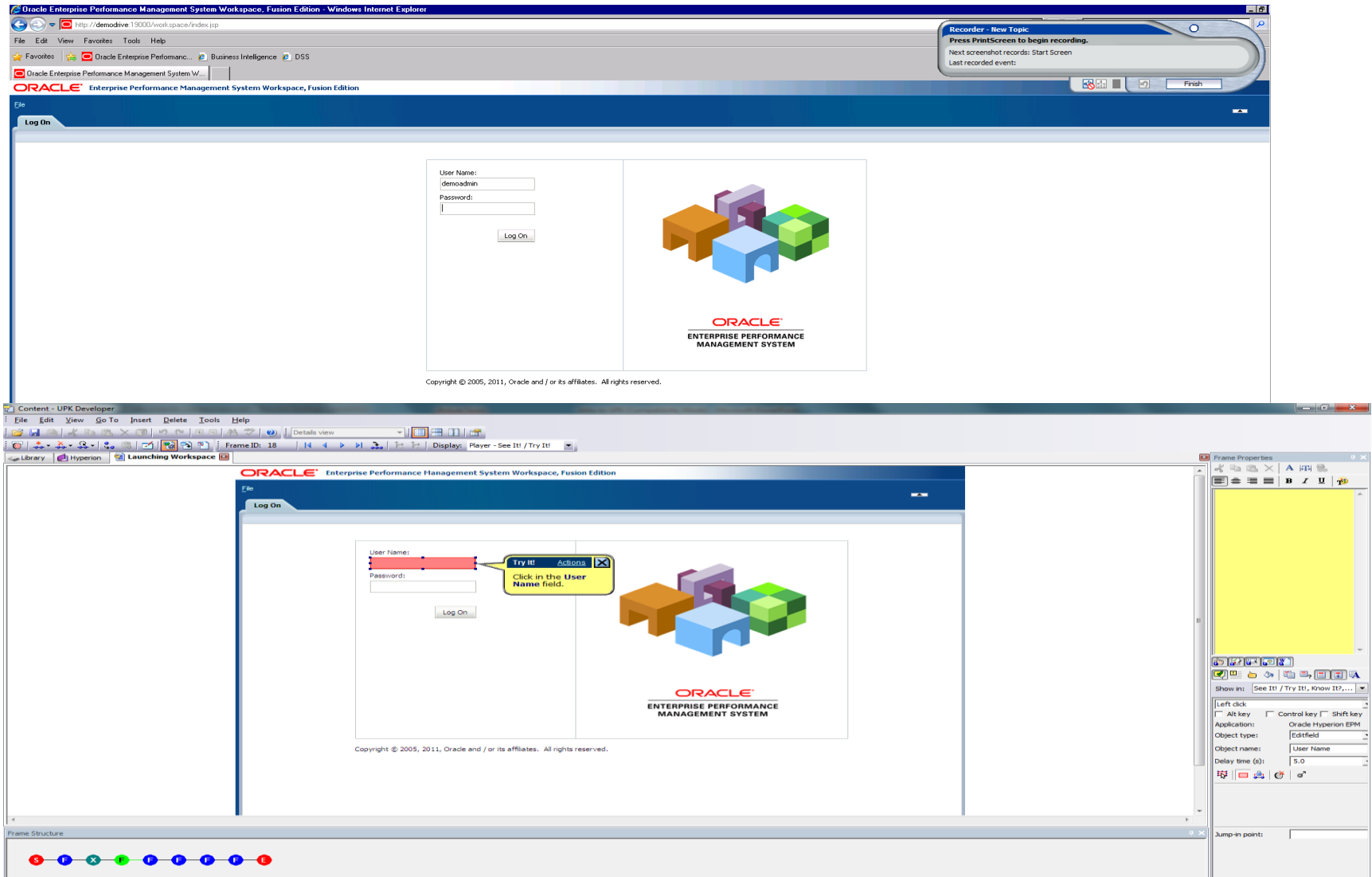


## Topic

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.



# Topic Recorder / Topic Editor



The image displays a screenshot of the Oracle Enterprise Performance Management System Workspace, Fusion Edition, running in a Windows Internet Explorer browser. The browser window shows the URL <http://demodiv19000/workspace/index.jsp> and the Oracle logo. The main content area features a login form with fields for User Name (containing 'demoadmin') and Password, and a 'Log On' button. To the right of the login form is a graphic of four interlocking cubes (orange, purple, green, blue) and the text 'ORACLE ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM'. Below this graphic is the copyright notice: 'Copyright © 2005, 2011, Oracle and / or its affiliates. All rights reserved.'

Overlaid on the browser window is the 'Recorder - New Topic' dialog box, which prompts the user to 'Press PrintScreen to begin recording.' and shows the next screenshot records: 'Start Screen' and 'Last recorded event:'. The dialog box has a 'Finish' button.

Below the browser window, the 'UPK Developer' application is visible. It shows the same login screen as the browser, but with a 'Try It!' button and a 'Click in the User Name field.' instruction. The 'UPK Developer' interface includes a menu bar (File, Edit, View, Go To, Insert, Delete, Tools, Help), a toolbar, and a 'Frame ID: 18' field. The 'Frame Properties' panel on the right shows the 'Show in:' dropdown set to 'See It! / Try It! / Know It! / ...'. The 'Left click' section shows the 'Alt key' and 'Control key' checkboxes, and the 'Application:' field set to 'Oracle Hyperion EPM'. The 'Object type:' is 'EditField', the 'Object name:' is 'User Name', and the 'Delay time (s):' is '5.0'. The 'Jump-in point:' field is empty.

# Documentation Output Formats

Document formats allow you to publish content in various predefined documents that can be published to Microsoft Office, HTML, and Adobe Acrobat.

- System Process Document
- Job Aid
- Training Guide
- Instructor Manual
- Test Document
- Presentation

# Additional Features & Functionality

- User Tracking – Knowledge Center
- Help Menu Integration
  - Context Sensitivity – Ability to integrate a published UPK Player to the help menu of a target application. End user will see a help link within the application that launches the UPK Player, displaying the relative topics matching the context ID.
- Localization - Multiple Languages
- Sound
- Questions & Assessments
- Glossary
- Roles (Outline Filters)

**Demo**



Demo!



# Questions

# Thank You !

