Rossera

Empowering your journey to the Oracle Cloud®

PROCESS AUTOMATION SERVICE DEFINITION

Version 1.1

Author: Rossera Commercial
Date: 1st May 2024

1   OUR UNDERSTANDING OF YOUR REQUIREMENT

Our organisation specialises in providing targeted solutions for Oracle enterprise resource planning (ERP) applications specifically Oracle Cloud Applications also known as Oracle SaaS (Software-as-a-Service) and the Oracle e-Business Suite. Our solutions are industry proven in UK central Government and are built for plug-and-play with Oracle SaaS.

We have a dedicated application for forms digitisation and process automation with Oracle SaaS Applications targeted at business users and process specialists. When combined with our specialist implementation team of UK based SC cleared resources, well versed with the UK Gov-cage Oracle Cloud ecosystem and delivery via Agile methodology, we can deliver business efficiency and return on investment in a very short timeframe.

The application gives customers the ability to perform forms-digitisation and configure end-to-end business processes that are fully integrated with Oracle SaaS applications offering employees compelling user experiences whilst driving greater self-service and automation. It provides a comprehensive framework for customers to automate business processes alongside native Oracle SaaS using the same security with identical user experience and runs in the same data centres as your Oracle SaaS environments. It will allow for rapid on-boarding of non-native processes into the Oracle Cloud ecosystem providing a unified experience for users across all processes and offering them a high grade, digital experience. Further, the data and process metrics are available to allow monitoring at scale to facilitate continuous business improvement and efficiency.

The application offers a comprehensive set of features that allows business processes to be automated quickly and efficiently, consolidating and minimising the technology footprint and greatly reducing technical debt and support costs. Given the speed of deployment, it builds momentum and demonstrates tangible outcomes early. We help our clients create a culture of problem solving and empowerment, where we enable teams with the skills, tools and methodology to address pain-points in the delivery of their processes. We find that the teams know what needs to be done, we provide them with the application and skills to do it themselves and deliver processes of most value. In alignment with the recently published government Sourcing and Consultancy Playbooks, not only does the tool provide a consistent, repeatable methodology, it allows consistency in the way that we can measure success.

Our Agile implementation methodology is based on a product centric approach to development, focused on delivering to the business need. With a proven track record in Government for flexible, 'can-do', on-time, on-budget delivery, we exceed customer expectations at every opportunity. Given the ease of deployment, our application is an ideal use case for upskilling your wider team in working in Agile methods. We will work with the client to support Agile upskilling and cross training.

Creating ownership and opportunities to drive the agenda across a range of employees, from experienced business users to more junior staff will create enthusiasm for learning new skills when people see tangible results. We will help foster a varied and challenging working environment spanning the entire business, giving staff wider exposure. Upskilling would follow a watch-it, do-it, lead-it approach, providing resilience and self-sufficiency as teams change over time. New customer driven product features will be regularly released affording staff the opportunity for continuous learning of new technological features.

Consolidating disparate business processes into one application also offers the opportunity to recognise where the same task is being performed in different ways, allowing for rationalisation and alignment across the business. Further, it can also allow for processes to be connected, 'joining the dots' between one process and another, allowing for automated pass through from one to the next, for example a New Starter process automatically linking into a Security Pass application, Gym or Civil Service Club memberships or the like.

In the wider cross-government community we would work with you to showcase automation use cases, linking into cross-government automation teams or forums. We are also members of UK wide forums and special interest groups that we will look to leverage.

Many systems integrators attempt to deliver process automation for Oracle SaaS applications by building customers monolithic point-solutions using software tools that need to be programmed by technical development teams. Our application is a plug-and-play application designed from the ground-up to be for business users and process specialists to implement process automation, minimising the need for technical personnel or system integrators.

Rossera has proven delivery experience of Oracle Cloud solutions and support services in UK Central Government and are able to provide positive references.

Through engaging with Rossera, the client will further have the opportunity to tap into Rossera's knowledge and capabilities around the Oracle Cloud ecosystem. The client will also be able to access additional services such as consultancy and software solution delivery as required in addition to the Process Automation capability defined in this document.

2 OUR APPROACH TO TAKING ON THE SERVICE

The proposed Rossera approach is to work with the client on a collaborative journey towards a strategic partnership via a close working relationship, delivering service and project capability. The approach will include a Customer Engagement Manager working closely with the client to evaluate and improve the service offering, underpinned by the wider Rossera resource pool to act as the intelligent supplier who understands the complex landscape of the client's existing ERP footprint as well as having first-hand experience of on-premise ERP, moving on-premise to the Oracle Cloud and the Oracle Cloud ecosystem itself.

We see each engagement as an exciting opportunity to garner a trusted quality service, implemented via an Agile structured service management model predicated against clear work packages and enhanced ways of working.

Rossera will strive for continuous improvement of all services offered. Rossera will work with the client in growing the resource pool available to improve resilience and better meet the demand for project delivery as well as offering value-add services centred around the Oracle Cloud ecosystem.

We can apply a full Agile methodology or a pragmatic blend of Agile with your methodology to suit your needs and to allow your business users to on-board processes into the application in the most efficient manner possible. Our team will work with you to storyboard and understand your user stories. Processes can often be configured and published for review in a matter of hours. Through iterative playback, detailed requirements can be driven out to ensure that the final product exceeds the customer's expectations.

2.1 A Support and Delivery Service Centred on Agile & DevSecOps

If not there already, Rossera advocates an Agile methodology to delivery, in order to better support client outcomes, objectives, values and principles. Central to this is the adoption of Agile and DevSecOps practices.

The implementation of these paradigms can be complex and Rossera is acutely aware that organisations often struggle with how to integrate their ERP function within the parameters of these methodologies due to the nature of these functions traditionally following a Waterfall model.

Rossera has first-hand experience in delivering ERP solutions in an Agile environment using a security-focussed Cloud DevSecOps Team within UK Central Government as well as having

worked on numerous ERP implementations which followed a typical Waterfall methodology. Moving to operating in an Agile environment with DevSecOps teams requires a cultural shift coupled with a practical approach to finding a suitable mix of methodology and tooling which enables better, faster delivery that is more responsive to business needs without compromising quality.

Rossera appreciates that transitioning to new ways of working can take time. We understand that there are different levels of capability and maturity within an organisation. We are therefore well placed to be able to shape the transformation of the function to promote change and greater collaboration across the business.

As part of the service, Rossera will provide resources to shape the ERP support and delivery function. Rossera collaborate with the client on the ways of working and delivery paradigms which are evolving within the organisation. Through our support and delivery, we will help transition the ERP function to an output-based model and streamline delivery to support programme objectives as well as ensuring that traditional Business-as-Usual (BaU) activities remain undisrupted.

2.2   A Balance of Tooling and Methodology for ERP Support and Delivery

Rossera acknowledges that there is often an aspiration to move towards greater automation for demand management but is also sensitive to the unique characteristics of an ERP function within an organisation and the nature of operating within the parameters of a large ERP CotS (Commercial-of-the-Shelf) product such as Oracle Applications. Rossera will work with the client to implement the use of the appropriate tools to support the function.

Rossera will adopt a collaborative approach with the client to continually refine the methodology and tooling to be used for each subsequent phase of the contract until such time as the ERP function has settled into a more regular cadence of support and delivery. Rossera will use our intimate knowledge of support and delivery within the Oracle Applications on-premise and cloud ecosystems to help guide the client and to implement the methodology and tooling that is the best fit for the nature of their ERP function.

3   CONFIRMATION OF SERVICE COMPLIANCE

Rossera will review the requirements provided by the client and deliver a comprehensive report to demonstrate compliance of the service offering.

4   HOW WE WILL DELIVER THE SERVICE

4.1   Governance

Rossera recognise and will adopt the governance framework set out by the client. We see the approach to an efficient governance model as a collaborative journey with an aim to keep the process as simple as possible so that the team can focus on support and delivery outcomes.

4.2   Support and Delivery Methodology

Our recommended approach to delivery would be to deliver units of work known as Service Components. These Service Components will be delivered in Service Increments. Each Service Increment will cover a quarter year as per the specific client Work Order. Each Service Component will consist of one or more Agile Story Points.

Story points will be delivered in a series of sprints during the increment with time reserved at the beginning and end of each increment for planning, innovation and reflection. The

period of a Service Increment and Sprint duration may evolve over time to a cadence that may better suit the ERP function. Story Points may be used for both support and delivery.

The definition of a Story Point can be complex, Rossera would offer the client an opening proposal during the first increment (Mobilisation), Rossera will work with the client to measure how many Story Points are delivered during the period. This will be used to refine the value attached to each Story Point for the next increment.

Rossera will initially provide a team of resources to deliver at an agreed average total velocity of Story Points per quarter year. It is understood that the velocity and anchor stories against which Story Point estimates are based, may evolve during mobilisation and stabilisation phases.

Rossera would provide Anchor Stories to aid with the definition of the value of a Story Point and to facilitate estimating during mobilisation. It is understood that the Anchor Stories and Story Point definition may evolve during mobilisation.

Following each quarter's Increment Review, any under-delivered Story Points would be added to the to the next periods delivery. Under-delivery in the final month of a contract would result in a credit. Over-delivery of Story Points would be carried forward to the next period. Should the total Story Points delivered exceed the agreed velocity prior to the end of the contract, for example, additional programme pressures or high-priority incidents, additional Story Points would be subject to Change Control.

Rossera would request that the client ensures that the velocity of Story Point delivery will not be impacted by either their or other Third-Party dependencies. Where resources are available and client or other 3rd party dependency prevents the delivery of an agreed Story Point, resources will request alternative activities with respect to the client backlog in order to maintain velocity.

We will use our Agile delivery methodology to deliver Digital Business Services via our automation application following four key project phases Think > Design > Do > Deliver.
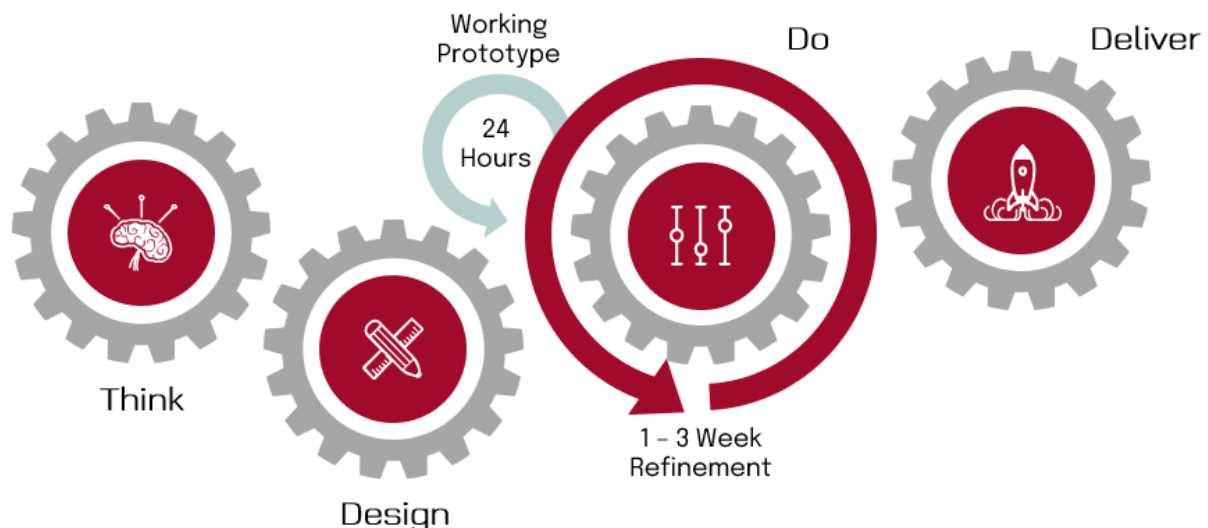
4.2.1   Think

Quantifying and validating the process automation backlog and agreeing initial delivery scope based on our value-based prioritisation framework.

Prioritisation Framework
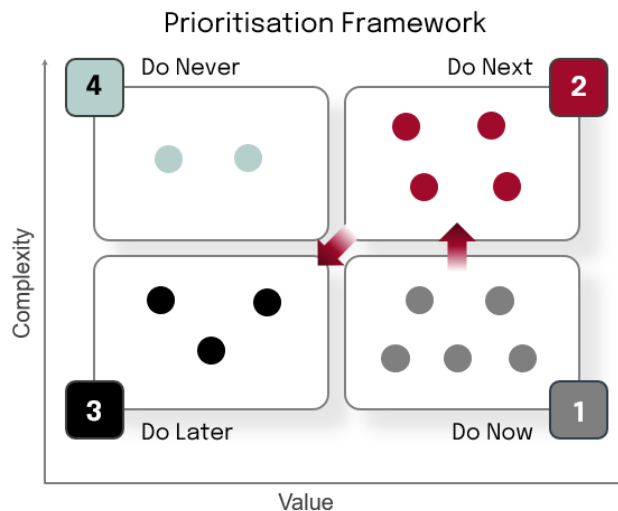
During this phase we will run process discovery workshops applying the key success factors (Cost Savings, Time Savings, Error Reduction) to clarify process automation candidates in order to validate the initial processes to deliver against. Processes will be scored against frequency, effort, FTE saving, reputational impact, benefits and complexity to ensure the high value candidates are selected. The process automation backlog will be revisited and re-prioritised if required prior to each sprint commencing.

4.2.2   Design

Each process will be described as an Agile Epic and go through detailed scoping in the Process User Research and User Journeys workshops. The process will be reviewed in context of the as-is and to-be optimised end-to-end user journey. User research into user needs including accessibility and existing pain points will help to drive process optimisation.

4.2.3   Do

During this phase, we apply the process configuration and play this back to the product owners and subject matter experts (SME). This is an iterative process to refine and perfect the resulting user journey. During this phase, detailed requirements for data capture, actors, security, notifications, analytics, business change impacts and escalations would be captured. Once the process is accepted it will be documented.

4.2.4   Deliver

This phase will deploy processes developed in the 'Do' phase to production following acceptance and accessibility testing against the user stories defined during the 'Design' phase.

The following plan provides a high-level picture of the tasks and timeline to deploy the product into an existing Oracle Cloud ecosystem, configure nominated processes and provide knowledge transfer.

4.3   Charges

Subject to client requirements. Charges will be aligned to the Rossera SFIA rate card, and license and support packages available.

4.4   Change Requests

Further works requested outside the scope of the Service offering can be procured as Additional Story Points, Fixed Price or Time & Materials, depending on client requirements and the nature of the work. Charges will be aligned to the Rossera SFIA rate card.

4.5   Mobilisation

Rossera will work in collaboration with the client to develop and execute a mobilisation plan to transition and take on the provision of support and delivery services in an Agile manner.
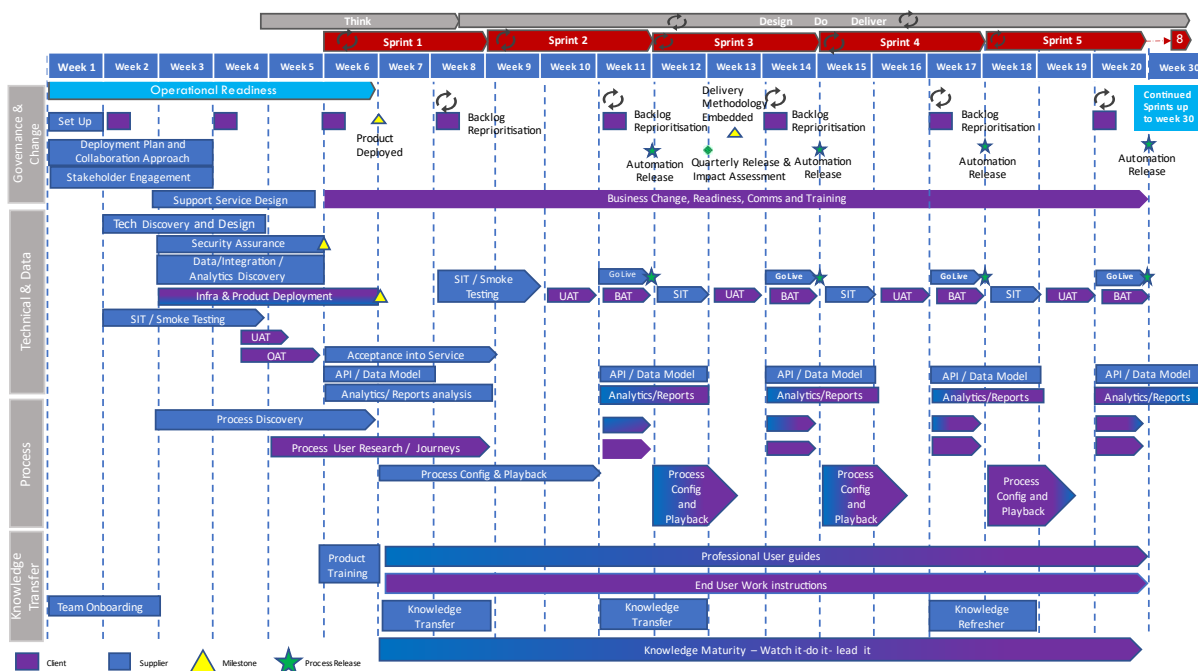
This would usually be via a number of collaborative workshops. Typically the transition would take one or two quarterly increments to reach maturity.

4.5.1 Typical Process Automation engagement

4.5.1.1 Agree the plan

Whilst we appreciate every client will have specific requirements, a typical initial engagement is shown below.

4.5.1.2 Agree Onboarding strategy

- Initial Rossera Resources; deployment of the Rossera team.
- Future resource requirements plus model for stabilisation and growth.

4.5.1.3 Agree relevant Tooling

- Project and Portfolio Management (e.g. Jira).
- Document Management (e.g. Confluence, SharePoint).
- Team communication and collaboration (e.g. Slack).
- Sprint Retrospectives (e.g. Scatterspoke).
- Dev/Ops Release Management (e.g. GIT).
- Interim measures (spreadsheets etc, whilst the above tooling is provisioned/deployed).

4.5.1.4 Agree MI and reporting templates

Some of which are set out below:

- User Story Progress -> Committed, Delivered, Not Delivered, Blocked.
- Team Continuous Improvement Items.
- Defect Reporting.
- Delivery Velocity.
- Burn Up Charts (Planned Scope vs Users Stories completed over time).
- Release Schedules and Reports.
- Service Measurement against KPIs.

- Agree percentage of Story Point output for reactive support, defects and unforeseen events.

4.5.1.5 IT Access provisioning

Access provided to relevant desktop tooling to undertake work assigned and interim measures.

Access to relevant environments and applications to undertake work assigned for the resources that require.

4.5.1.6 Agree planning deliverables and templates

- Formation of a single backlog including Capability and Operational Services.
- Definition of Anchor Points and associated Story Point estimates prior to first increment.
- Agree prioritisation of SR's, Incidents and Problem records and assign story points.
- Defining user stories and prioritisation of work to feed the first increment.
- Jointly allocate Story Points to the planned user stories forming the first increment.
- Agree cadence of incremental, sprints and iteration events calendar and meetings.
- Agree how innovation cycles will be conducted and outputs shared.
- Formation of appropriate templates and KPI reports to support the measurement of the service.

4.5.1.7 Agree Governance Structures

- Supplier and client team structures and named delegates.
- Meetings Terms of Reference / Frequency / Responsibilities and points of escalation.
- Agree CCN ways of working with a robust Change Control approach.

4.5.1.8 Knowledge Transfer:

Our application is a configurable toolset which is intuitive and requires minimal training for end users. No coding or programming knowledge is required. Our approach enables the client to be fully self-sufficient by the end of our engagement. Knowledge transfer (KT) is fundamental to our methodology and starts at the very beginning with how we set up and run the team. We create a fully integrated team from the start by co-delivering workshops, configuration and process deployment with the team who will own this within the client going forward. We follow the industry leading approach to learning which is based on the 70:20:10 principle.

Built on the foundation of experiential learning, our approach to knowledge transfer is based on our Watch-It > Do-It > Lead-It method to make sure our clients are ready to lead the next round of implementation.

Our sprint delivery approach means your team works alongside ours, taking over more of the development tasks with each sprint cycle, with you fully leading the delivery of the final two sprints with our team coaching and supporting. We also include formal training sessions for technical and system administration handover during the operational readiness phase, some familiarisation of the product during discovery phase and a recommended self-directed learning curriculum to reinforce key concepts.

Our plan and methodology for KT will take a co-delivery approach. From day 1, the client team will gradually take on more delivery tasks, fully delivering the final 2 sprints. Three formal learning days will be delivered at regular intervals covering process configuration and

system administration. Self-directed learning content will be assigned for ongoing self-study with expected completion time of under 15 hours.

Client	Supplier Roles	Phase / Effort
Technical Support Roles	Infrastructure Specialist	Operational Readiness / 2 Weeks
Functional Leads	Business Analyst (BA)	All / Contract Duration x 30%
Automation Resources	Process Configurator	All / Contract Duration x 80%

The percentages above are based on a proportion of the example 30-week plan e.g. 20% equates to 6 over 30 weeks overall. This time encompasses both hands-on implementation and delivery combined with inherent knowledge transfer as shown on the plan below:
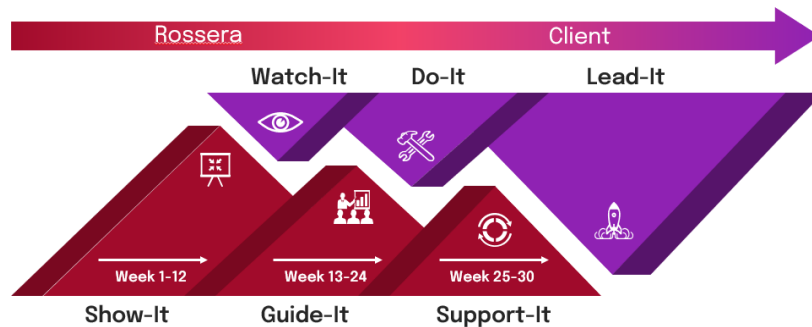
Our approach is hands-on, which speeds adoption and is the most successful way to transfer knowledge. We see the following risks, assumptions, dependencies, issues and opportunities based on our previous experiences.

Risks: Implementation approach is not embedded into the unit with sufficient resources assigned to ensure it become a resilient service offering.

Issues: Key business, functional & test resources are not available; Assumptions: Customer embraces and participates fully in Watch-It > Do-It > Lead-It methodology from inception.

Dependencies: Strong leadership alignment and proactive stakeholder engagement before and during delivery.

Opportunities: Through effective KT, the client's automation team can deliver processes into the solution realising huge business benefit in a short timeframe.

5   HOW WE WILL REPORT ON OUR SERVICE

5.1   Presentation of Service Compliance

The measures and reporting of service compliance will be presented via the governance boards. Each Service Component that has been agreed for delivery in the Increment shall be tracked against the plan. This will be agreed in detail during mobilisation.

6   PRODUCT SUPPORT

Rossera provide a range of third line product support offerings tailored to client requirements. Our application releases and updates are in lockstep with Oracle's quarterly patching cycles. Support offerings include, for example, a fully hosted SaaS model though to product support for our products running on client infra – whether that be in the cloud or on-premise.