

Brovanture Ltd – G-Cloud 15 Description of Services

Implementation, Consulting, Training and Support

Oracle Cloud EPM SmartAudit



HM Government
G-Cloud
Supplier

ORACLE

Partner

ORACLE NETSUITE
Solution Provider

brovAnture

a fresh approach to EPM,
ERP & Analytics success

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1. Introduction

Based on Brovanture's extensive knowledge and expertise in Oracle Cloud EPM*, we have developed a transformative SmartAudit process that pinpoints the root causes of client's current Oracle Cloud EPM system challenges. This comprehensive system assessment is designed to optimize the user experience for both end-users and administrators, unlocking unparalleled value and performance from a client's Oracle Cloud EPM investment.

Brovanture is committed to conducting a thorough evaluation of an organisation's existing Oracle Cloud Enterprise Performance Management (EPM) infrastructure. The SmartAudit will present key findings and deliver a set of actionable recommendations aimed at enhancing the efficacy of the Oracle Cloud EPM solution. These recommendations, derived from Brovanture's extensive experience in Oracle Cloud EPM, will combine best practice guidelines with your organization's individual requirements. Brovanture will propose specific actions to resolve existing operational challenges.

* Brovanture is an Oracle Certified Cloud EPM Partner and was the first to implement Oracle Cloud EPM Planning in the UK/IRL region in 2014 and the first Oracle partner to achieve 'Oracle Certified Expert Partner' status for Oracle Cloud EPM in UK/IRL region.

2. Approach

2.1. Methodology

The Brovanture SmartAudit methodology entails conducting comprehensive interviews with a diverse array of your stakeholders. This gives us detailed insights into the current state of the Oracle Cloud EPM solution. These stakeholders typically include members from the Oracle Cloud EPM implementation/support team, business process owners, system administrators, the training team, finance business partners, management accountants, as well as other specialized technical teams responsible for associated application components such as Oracle Cloud ERP, Oracle Analytics Cloud (OAC) and Oracle Project Portfolio Management (PPM).

The objective of these interviews is to develop a deep understanding of the implementation lifecycle, existing challenges, envisioned future requirements and unique organizational requirements pertaining to the Oracle Cloud EPM solution. As an integral part of this evaluative process, Brovanture will require access to the existing Oracle Cloud EPM application and its current documentation.

Our SmartAudit will not only appraise the overall application architecture, usability, and performance but will also emphasize alignment with your specific set of high-level organizational objectives and requirements.

2.2. Primary Activities

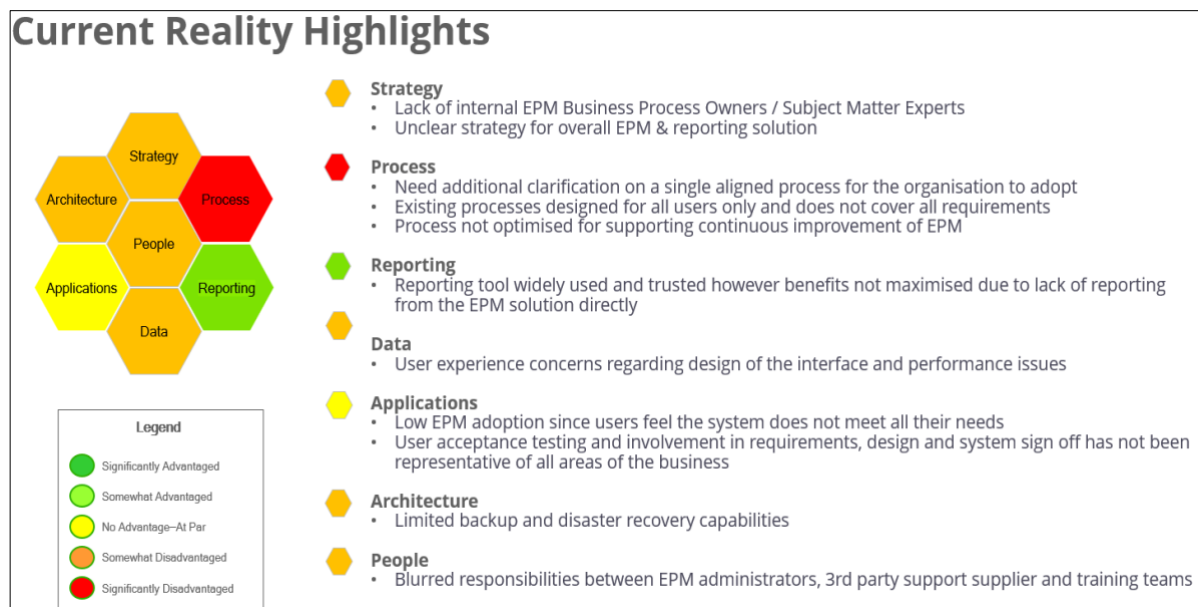
When undertaking a comprehensive SmartAudit of an Oracle Cloud EPM application, the evaluation activities are systematically divided into seven pivotal categories:

- Architectural Design
- Application Components
- Strategy
- Operational Processes
- Reporting Mechanisms
- Data
- People

These categories collectively serve as the foundational elements for assessing the current state of the Oracle Cloud EPM solution. Moreover, they inform the development of targeted recommendations designed to bridge any identified gaps, thereby facilitating the transition to the desired future state of the system.

3. SmartAudit Structure

The report produced employs a color-coded traffic light schema. This effectively indicates areas where the existing application successfully aligns with organizational needs, as well as pinpointing areas where it falls below expectations.



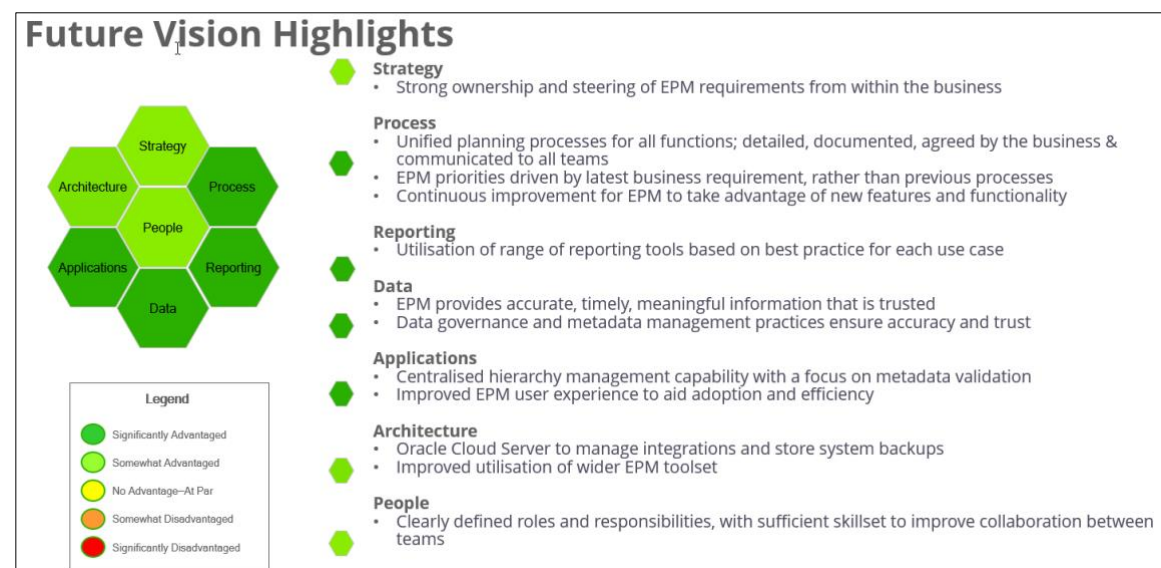
Example of colour coded reporting

4. SmartAudit Deliverables

The document produced as part of this review will include the following sections:

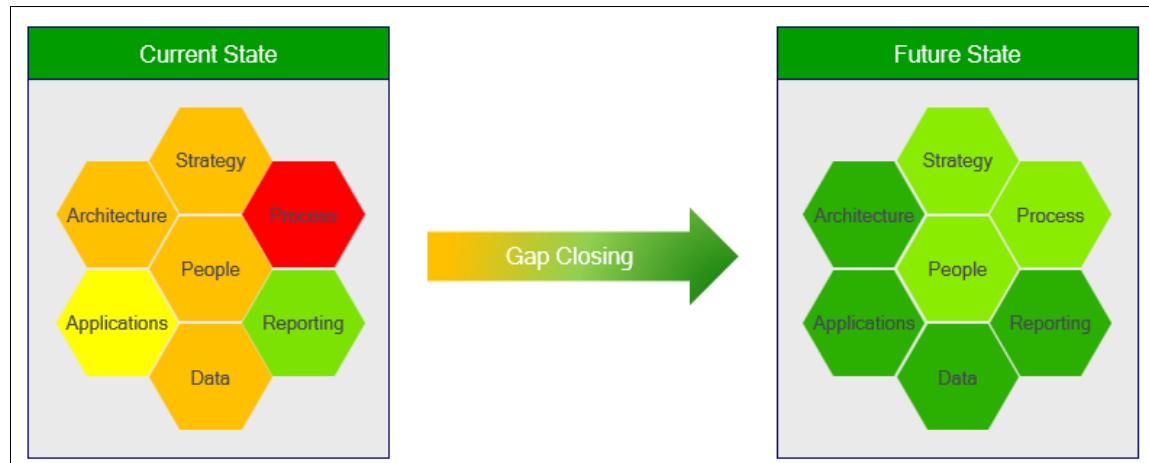
4.1. Summary of the current reality and vision for the future

An analytical overview of the present circumstances is provided addressing the extent to which the application aligns with business and user requirements. Specifically, the SmartAudit considers whether the application features meet user demands and whether the system is operating as intended. The evaluation also explores whether any modifications to the original design have resulted in issues, such as a fragmented application, that fall short of meeting the collective needs of all users. Additionally, the SmartAudit encompasses an assessment of the rate of system adoption and describes if and how EPM processes could be better aligned across the organization to increase user engagement and commitment.



4.2. Current vs future state summary

The report highlights where gaps exist between the current state and desired future state of the system.



For each of the seven categories the report describes the current state of the application and what the future state could look like once appropriate actions have been taken. For example:

Applications	
Current State  In many respects the applications are providing the functionality required. Challenges remain that could be addressed: • The mapping process to transfer data between the Finance and Projects cube is slow and impacts the users directly. • There are dimensions and hierarchies in the applications that are no longer required and could be removed • Processes not optimised for supporting continuous improvement of EPM • Currently no assessment of new EPM features released (or being deprecated) as part of monthly patches	Future state  • Improved user experience when budgeting, forecasting and reporting in EPM • Assessment of new features released in monthly patches, with process in place to implement continuous improvements efficiently • Redundant elements removed from application • System administration and maintenance tasks are clearly documented.

4.3. Gap Closing Strategy

The gap closing recommendations typically form the bulk of the SmartAudit and are split into the following three categories:

- **Standard EPM Best Practices** – Recommendations of EPM best practices to be applied to the organisation
- **Client Specific Recommendations** – System updates that are specific to aligning the organisation's EPM processes
- **Future System Enhancements** – Further development to increase the benefits of the EPM solution utilising additional functionality within Oracle Cloud EPM

These include a broad indicative timeline for the implementation of changes required to deliver the recommendations of the report.

4.4. EPM Best Practices recommendations

The principles of each best practice recommendation will be accompanied with an outline of the key benefits and considerations for the suggested change. Some changes may be short term 'quick wins' others may require longer to implement.

Gap Closing – ERP Hierarchy Management



Management of CoA hierarchies in ERP & EPM

Issue: Each new version of the ERP alternate hierarchies are denoted with a new vX number (e.g. XXCOA_BCL_ACCOUNT_V5) rather than editing a single master hierarchy.

This means alternate reporting hierarchies remain outdated in EPM, unless the integration is updated every time to use the new version number. This limits the ability to report directly from EPM as the alternate hierarchies are reporting structures.

Proposal:

It is recommended to use a single hierarchy for each alternate roll up which is updated when required, rather than creating new copies with increasing version numbers. This means that the EPM alternate hierarchies can update automatically, without changes to the integration each time.

This is the method currently used for the Chart of Account segments, so this change would align the alternate hierarchies to use the same method in ERP and simplify the metadata update process.

Recommendation:

- **Short Term** – Use a single hierarchy for each Chart of Account & alternate hierarchy in ERP. If copies are required, take an archive but keep the master hierarchy constant
- **Long Term** – Implement a dedicated master data management system through the Data Governance Team (see [Gap Closing – Master Data Management](#) slide).

Key Principles

- Master data needs to be managed in a common & consistent way
- Management should apply to alternate hierarchies which are critical for analysis and reporting.

Key Benefits

- Consistency in hierarchy management
- Simplified integration of hierarchies across platforms
- Improved flexibility to business changes
- Less effort to develop and maintain over time.

Key Considerations

- Hierarchies are used across multiple reporting systems so agreement must be made, including EPM and OAC
- Full impact assessment is required before implementation.

4.5. Client Specific Recommendations

This section of the gap report will consist of recommendations that are specific to resolving known issues the client has and be in line with any current requirements document provided to BrovAnture as part of this SmartAudit.

Gap Closing – Documentation



Ensuring documentation is kept up-to-date

Issue: Documentation has fallen out of sync with the current system. This is not uncommon since the focus is often to complete projects on-time so timeframes can become strained. The application is also constantly evolving so documentation can quickly become outdated.

- There is little guidance available directly within the system for users completing tasks, users are required to visit full documentation for assistance
- There is a need to revisit detailed training guides which have been issued for EPM as it is common that detailed levels of guidance can fall out of sync as the system evolves
- Little documentation on current environments usage and cloning process – see [Gap Closing – Environment Maintenance](#).

Proposal:

- Sufficient time needs to be allocated into each system release or change request for updating, reviewing and signing off documentation. When changes are released, the following key documentation should be reviewed for impact:
 - end user & system administration guidance
 - configuration workbooks
 - integration design documents
- Process maps within user guides need to be viewable in a larger format, or made available separately
- The following specific areas will benefit from additional documentation:
 - System administration - tasks, month-end, year-end processes
 - Duties and areas of responsibility for each function; incident support, user queries support, system administration, development, training, environment maintenance and cloning, disaster recovery.

Key Principles

- System design and key decisions relating to the system are documented and documentation should be kept up-to-date or periodically reviewed and updated
- EPM documentation is stored in the Hera Programme SharePoint site
- Designs, Release Notes and Change Requests are documented.

Key Benefits

- Documentation reflects the current processes and activities
- Quicker onboarding for any new staff performing EPM related activity.

Key Considerations

- Documentation needs clear ownership. For example, environment usage is owned by 'team x' and documentation should be maintained by this team.

4.6.Future System Enhancements

This section of gap closing consists of ways the client can increase the benefits of the EPM solution through developing and expanding their Oracle Cloud EPM solution to utilise additional available functionality.

Gap Closing – Master Data Management	
Implement Enterprise Data Management The goal of Oracle Cloud Enterprise Data Management (EDM) is to improve the quality of reference data (for example, Chart of Accounts, Cost Centre, Locations etc.) by centralising the collection, consolidation and propagation of master data throughout the organisation. The following are the major steps for implementing EDM: • Define the process to manage collection, change process and publication of key master data • Assign accountability and responsibility for Enterprise Data Management to an organisation unit • Design and implement the Enterprise Data Management application • Conduct training on Enterprise Data Management process and tools. Enterprise Data Management should be implemented by subject and closely coordinated with the ERP, PPM and EPM application development projects.	 Key Principles - Master and reference data is needed throughout the application architecture - Master data needs to be managed in a common and consistent manner - Is often the cause of disagreements over "the numbers" – such as providing a common definition for key metrics - Includes hierarchy management which is critical for analysis. Key Benefits - Better organisation wide decisions - Removes burden of manual master data management activities in IT and business functions - Less information disagreements - Improves flexibility to business changes - Less effort to develop and maintain over time. Key Considerations - Implementing EDM after ERP, PPM and EPM will require revisiting the flow of the metadata integrations.

5. Summary

Partnering with Brovanture for an in-depth SmartAudit will highlight the existing applications strengths and provide a detailed explanation of areas that can be optimized to increase the benefits realised. Brovanture blends industry best practices with configured solutions that are specifically designed to address an organisation's unique needs and to deliver exceptional benefits and value for money.

Our expert evaluation serves as the basis for actionable, focused recommendations that will deliver successful application changes to meet both short and long term client requirements. Your organisation can unlock unparalleled value and peak performance from your Oracle Cloud EPM investment as we help guide your transition to the state-of-the-art solution.

6. About Brovanture

Brovanture successfully delivers Enterprise Performance Management (EPM) and Enterprise Resource Planning (ERP) solutions to large and mid-size commercial and public sector organizations, based on Oracle and NetSuite technology. Brovanture is an 'Oracle Certified Service Partner' for Oracle Cloud EPM and Oracle Hyperion solutions, is an accredited supplier with UK Government G-Cloud and has Cyber Essentials, ISO9001, ISO27001 and ISO 14001 accreditations. It was one of the first Oracle Partners to implement Oracle Cloud EPM, both planning and financial close, and continues to be at the forefront implementing and supporting Oracle's cloud technology. In 2025 Brovanture celebrated its 20 anniversary and has completed over 150 successful projects for organisations including The UK Department of Health and Social Care, arqiva, Bird & Bird, Mountstreet Group, discoverIE, Guy's and St Thomas' NHS Trust and Liberty Global. Brovanture's onshore Helpdesk supports Oracle Cloud, NetSuite and on-premises Hyperion solutions across a

wide range of high-profile organisations including Dechra Pharmaceuticals, Hillingdon Council, HM Treasury, National Highways and Applegreen.