LARMERBROWN

Case Study:
Vocalink

VocaLink were preparing to upgrade Oracle Financials when the Project Accountant met with Larmer Brown and identified how UPK could be more effectively used throughout the Project.

VocaLink designs, builds and operates worldclass payment systems and ATM switching platforms. They are responsible for the UK national payments infrastructure (a national grid for payments).

VocaLink's services touch the lives of almost everyone in the UK. Through their systems VocaLink processes over 90% of UK salaries, over 70% of household bills and almost all state benefits.

VocaLink technology powers the BACS and Direct Debit schemes as well as connecting the world's busiest network of over 65,000 ATMs through the LINK scheme.

The company also provides the infrastructure for the Faster Payments Service, which helps businesses and individuals realise the value and benefit of real-time payments.

The Background
VocaLink implemented eBusiness 11i for Procure to Pay, which included iProcurement and iExpenses, about five years ago. Oracle User Productivity Kit (UPK) was introduced by their Oracle representative and some training was provided at that time, enabling VocaLink's Project Team to support users via UPK.

Technical

Content
Development

Approximately 25 processes (Topics) were developed and deployed for this purpose. The content did not utilise UPK features such as Job Roles and Help Menu Integration (HEMI), although given the scope of the content this was not considered an issue.

Peter Rendell, Project Accountant at VocaLink, joined the company shortly after Go Live and received some basic training on UPK. This enabled him to maintain and enhance the content as and when end user feedback identified a learning or support requirement.

The new topics developed were outside the iProcurement and iExpenses scope aimed as users in Procurement, Payables and Receivables. The topics were short, relatively simple and usually published as Job Aids.

Peter attended Larmer Brown's UPK Event at Oracle's London office in February 2012. It was during this event that Peter realised how UPK could be used more effectively throughout a project. This knowledge was timely as VocaLink were preparing their upgrade of Oracle Financials from 11i to R12.

The Project

The upgrade of Oracle R12 necessitated the upgrade of VocaLink's UPK v3.6 server, in order to take advantage of the latest UPK functionality.

VocaLink deploy applications using Citrix and it was therefore a requirement of the upgrade that UPK content was captured via Citrix.

Deployment of applications via Citrix can bring some challenges and adding UPK to the equation offered no exception to this. If UPK is not deployed in the correct manner, the impact on the accuracy of the captured content can be significant. The Citrix challenge coupled with VocaLink's secure infrastructure could have made the upgrade complex.

Having met with Larmer Brown's Technical Director at their UPK event in February 2012, Peter felt confident that Larmer Brown was the right partner to support this upgrade Project.

The upgrade took place over a three-day period in April 2012, and successfully introduced HEMI.

The Challenges

At the outset of the R12 Project, it was agreed that the existing UPK topics would be upgraded to reflect the new screens and functionality in iProcurement and iExpenses. However, as the Oracle Financials upgrade to R12 developed, it was clear that the Accounts Payables and Accounts Receivable functionality in Oracle R12 were very different from 11i.

It was agreed to develop new topics in UPK to capture the R12 functionality in Accounts Payable, Accounts Receivable and the Period End closure process. This would provide a set of robust and comprehensive training and support materials.

Three members of VocaLink's Finance Systems Team had previously used UPK. The initial plan was therefore to leverage this internal resource and manage the UPK development internally. The team possessed a combination of content development and Subject Matter Expert (SME) skills. However, it quickly emerged that the internal UPK Developers needed to focus on Project critical issues and VocaLink were therefore unable to develop the new topics in-house.

During June 2012, Peter presented a business case requesting the support of an external provider to take responsibility for UPK development. The new topics required would capture standard Oracle Financials R12 functionality. Experience of

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the existing iProcurement and iExpenses topics indicated that this would be a straightforward development project.

Having personally developed UPK content, Peter was ideally placed to identify the best partner for the work. Larmer Brown's experience of similar projects combined with their robust and scalable best practice resulted in the Project being awarded to them in July 2012.

The Larmer Brown Team, comprising a Lead Developer and one additional Developer, commenced work in August 2012. Timelines were tight as the Project was scheduled to Go Live at the beginning of September.

The Project encountered unforeseen technological challenges, notwithstanding these, approximately 80 topics were developed, reviewed and signed off by the business and deployed in time for Go Live.

Most of the challenges were technical. The plan for the Larmer Brown Team to work remotely proved difficult as access to the environment could not be arranged within the timelines. A workaround was agreed enabling one Developer to complete the raw record in the VocaLink offices and forward the topic to the other Developer working remotely.

The Outcome
Peter Rendell advised,

 "UPK definitely provided a good number of 'quick wins' as the Oracle R12 Project went live, including the ability to send users links to the content on their desktops."

There is currently limited use of the UPK material in the business as the iProcurement and iExpenses functionality in Oracle R12 is very similar to that in 11i. However, the development of the Accounts Payable and Accounts Receivable topics has proved worthwhile in bedding down new processes and procedures.

In addition, the iProcurement Team has demanded further development of the UPK topics to capture some of the procedures they need to undertake in Oracle R12.

UPK activity is not tracked or reported in VocaLink but using this functionality is a consideration for the future.

The Future
The UPK Developers within the Finance Team plan to maintain the existing content as the R12 system embeds into the business and processes are reviewed and updated. Within the Finance Team there is a plan to undertake a significant number of development initiatives to extend the current content library. It is anticipated that this will commence as the current workload reduces.

Peter Rendell concluded,

 "Our use of UPK is still in its infancy. The Oracle R12 Project has raised the profile of UPK and it is anticipated that future projects will incorporate other financial and non-financial applications and expand the use of UPK across the project lifecycle."

About Larmer Brown
Larmer Brown's primary business objective is to help organisations realise the desired business benefit of their software applications, through successful user adoption programmes.

We are an Oracle Gold Partner and have been using Oracle's User Productivity Kit Professional technology to provide business transformation, documentation and training services since 1994.

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