www.certus-solutions.com

Certus Solutions

engage™ Implementation Services & engage.gov™ for Oracle ERP, HCM and Payroll Cloud in association with Accenture

Digital Marketplace
G-Cloud10 (G10)

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Foreword & Introduction

Government departments are continually under intense budgetary pressures to find cost savings. By enabling access to a wider range of suppliers and thereby creating a more competitive market place, the Crown Commercial Service (CCS) Digital Marketplace represents a paradigm shift in Government procurement. For the first-time Government departments can now directly access Small Medium Enterprises (SME) products and specialised service offerings at lower cost, providing greater flexibility and more importantly greater value for money through increased returns on investment.

The Advent of Cloud

Certus Solutions is pleased to offer its flagship **engage™ Service Wrap** offering for Oracle© ERP, HCM and Payroll Cloud applications deployed as Software as a Service (SaaS) or on premise through the government digital marketplace.

Our services can be accessed commercially on a risk and reward, fixed-price, time and materials and through utility based consumption commercial pricing models. This provides our clients with the widest range of options in helping them to understand, identify, de-risk, implement and support Oracle Cloud solutions, thereby protecting their investment.

Certus Solutions CCS Digital Marketplace engage™ service offerings have been designed specifically to facilitate end-to-end business transformation programmes using Oracle Cloud technology whilst adapting to the constant cycle of change and innovation by reducing our client's long term commitments through rapid agile delivery ensuring benefits are realised.

Our Unique Proposal

In selecting Certus you access:

- A pro-active engagement with an accredited Oracle partner that only specialises in Oracle ERP, HCM and Payroll Cloud, and has undertaken over 28 successful implementations, many on a global scale for major brand names
- An organisation that has significant demonstrable knowledge; allowing our Clients to leverage the organisation globally
- **engage.gov™** - A templated solution that has been specifically designed for government organisations but can be personalised and extended through further configuration recognising from the outset that "*one size does not fit all*" across all organisations
- **engage™ Service Wrap** – A proven implementation approach that takes advantage of rapid agile techniques to facilitate prototyping of the solution and actively engages the client through discovery
- An implementation approach that allows an organisation to transform using our **Cloud Readiness and Adoption Services**. A six-step approach to business transformation and Change Management based upon the **Prosci® (Professional Science) methodology** and the **ADKAR** model **(Awareness, Desire, Knowledge, Ability, Reinforcement)** for embedding change into an organisation
- An implementation approach that promotes extensive knowledge transfer of Oracle Cloud from the outset delivered both "on the job" and through Certus' extensive training and education capability, the same capability that to date has trained over 1,000 customer employees, Oracle Partners and Oracle Consulting (OC)

Introduction

This document contains a comprehensive service description of Certus Solution's engage™ Service Wrap for the implementation and on-going support of Oracle© ERP, HCM and Payroll Cloud Applications available to UK Public Sector organisations through the CCS Digital Marketplace.

engage™ services can be procured in their entirety or as individual components. As a consequence, we have provided a separate service description for each element within this document.

engage™ Service Wrap has been endorsed by Oracle Corporation and is officially recognised as an implementation and business support solution through the Oracle© Accelerate Programme for Midsize Companies. In recognition of this. Certus Solutions is permitted to badge the engage™ logo with the Oracle Accelerate for Midsize Companies logo.

We look forward to introducing our services to you and providing you with greater understanding as to how Oracle Cloud applications can, when implemented through the engage™ service offerings, transform and support your business. ***So now it's time to…***

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About Certus Solutions

Introducing Our Company

Certus Solutions is a specialist provider of end-to-end Enterprise Resource Planning (ERP), Human Capital Management (HCM), Payroll and Talent Acquisition (Recruitment and On-boarding) Cloud enabled business transformation programmes.

Certus specialises in the delivery, training and support of Oracle® Cloud Services (formerly known as Fusion Applications and Taleo) and is recognised not only as an Oracle Platinum Specialised Partner but also training provider to Oracle University and Alliances & Channels.

Oracle Corporation recognises Certus as product experts in the areas of Finance, Procurement, Human Capital Management, Recruitment, Learning and Payroll with three of the company's Executives recognised as Oracle ACEs, one as an ACE Director, the highest specialist accreditation available world-wide.

Partner of Choice – Proven Delivery Capability

Certus began their Cloud journey in November 2011 after attending training sessions with Oracle Development at their headquarters in Redwood Shores, California and the company subsequently created a dedicated Oracle Cloud Services Practice. As an approved implementation partner Certus is constantly working closely with Oracle on several existing and new clients, in both the public and private sector, who are now moving to the Oracle Cloud. Certus is committed to delivering the very best possible solutions to its customers and Certus believes that Oracle's Cloud based offerings are the best solutions in the market today and can deliver to customers a superior, cost effective and integrated solution.

ORACLE Platinum Partner
Specialized
Oracle HCM Cloud:
Oracle Fusion HCM Cloud Service Solutions

ORACLE Platinum Partner
Specialized
Oracle HCM Cloud:
Oracle Taleo Recruiting Cloud Service Solutions

ORACLE Platinum Partner
Specialized
Oracle Financials Cloud

Oracle Cloud Experience

Certus successfully undertook its first HCM Cloud implementation project in 2013 for Lavendon Group Plc and has since delivered 28 Oracle Cloud projects covering ERP, HCM and Talent Acquisition.

Certus Solutions has successfully delivered multiple Oracle Cloud Services implementations covering both Oracle ERP & HCM and Taleo Cloud Services suites on a global basis. Most notably the implementation for Lavendon Group Plc saw Certus deliver Oracle HCM Cloud across UK, France, Germany, Belgium, UAE, Oman, Qatar, Kuwait, Saudi Arabia and India; with JT Group; Schroders PLC, Standard Chartered Bank, Dyson and Save The Children all being global implementations.

Our consultants are among the most experienced in the industry, many of whom are respected by their peers in the global arena, and this experience is what sets Certus apart from many of our larger competitors.

Certus launched its Managed Services offering at the end of 2013 to provide customers with access to a broad range of specialist skills to protect and extend their investment in Oracle Cloud. The engage™ Business Support managed service offering can be taken on a flexible pay-as-you-go basis, or a fixed-fee to give customers extra peace of mind.

In November 2016 Certus successfully delivered the first central government implementation of Oracle ERP & HCM Cloud to the Office of National Statistics. This has been followed by a second contract award and successful implementation at HM Treasury in April 2017.

In July 2018 Certus in partnership with Accenture were awarded the contract to deliver Oracle ERP, HCM and Payroll Cloud for the Home Office using engage.gov™ as the foundation for a government wide template.

Our investment in Oracle Cloud Services has been and continues to be second to none, with the UK Oracle User Group (UKOUG) awarding Certus Solutions Gold Oracle Partner of the Year in 2013, 2014, 2015 and 2016 for its efforts in Training and Cloud Services as voted by the Oracle customer base. In March 2017 Oracle Corporation recognised Certus as its Specialised HCM Partner of the Year.

In April 2018 Certus Solutions was acquired by Accenture (UK) Limited.

UKOUG 2016 2017 Awards
PARTNER OF THE YEAR AWARD
GOLD WINNER

2017 Oracle Excellence Award
Winner
ORACLE
SPECIALIZED PARTNER OF THE YEAR: HCM CLOUD – EUROPE, MIDDLE EAST, AND AFRICA

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A Proven Track Record in Public Sector and Trusted Partner to HM Government

Certus has a rich legacy of successful project delivery for the UK Public Sector. Certus Solutions was born out of one of the largest government department efficiency initiatives of the 21st Century, when the founders of the company comprised the client side management team that were responsible for the successful delivery of the original implementation of Shared Services for HM Prison Service, known as the "Phoenix Programme" (2004-2008)

Consequently, Certus has a proven track record of delivering multiple technology driven business transformation projects in Central Government and to date has successfully delivered fifteen Shared Services Oracle based implementation projects and various other successful engagements for MoJ, NOMS, HMPPS, Home Office, CS HR Casework, Cabinet Office, ONS, DEFRA, AWE, HM Treasury and Public Sector bodies like the Bank of England.

In November 2016 Certus successfully delivered the first central government implementation of Oracle ERP & HCM Cloud to the Office of National Statistics. This has been followed by a second contract award and successful implementation at HM Treasury in April 2017.

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Confidence In Delivery

Certus Solutions confidence in delivery comes from its many years of experience and the knowledge that success is achieved through the combination of having:

- a management and leadership style that puts people first and at the heart of delivery
- a detailed understanding and product knowledge of the Oracle Cloud ERP, HCM and Payroll Applications and SaaS / On premise technology ensuring informed decisions are made
- a strong governance model ensuring costs are controlled and benefits stated are in fact realised
- a recognition that all IT programmes and projects are business change events; and an understanding that the aspirations of stakeholders is a critical success factor
- the ability to deploy multi-skilled teams that can motivate the client to succeed at all levels across an organisation
- an understanding that Oracle is not always necessarily the answer as the enabling technology, alternative options are available and that business operations can be delivered using manual processes if required
- having the flexibility and ability to adapt throughout a project lifecycle to an ever-changing complex business world coupled with the ability to create a lasting positive legacy through skills transfer and training

Innovation and Agility

Certus has a reputation for innovation and for being bold. We embraced Oracle HCM Cloud in 2011 when many established Oracle Partners were wondering whether to take it seriously. Certus was 100% convinced that Cloud would be the preferred deployment model for HCM and ERP, and set about transitioning our business to focus on it exclusively. Since deciding to go 'all-in' with Oracle Cloud we have had to be extremely innovative and work out for ourselves what 'best practice' is in the context of Oracle Cloud.

We haven't always got things right along the way, like any growing business working with new technology, but we had the advantage of being agile enough to change track quickly without it damaging our progress or our customers.

Innovation and agility is at the heart of what our consultants do every day and we are passionate about using that to create measurable value for our customers.

Thought Leadership

Our contribution to industry thought leadership can be traced back to the very origins of Certus and our decision in 2011 for the need for a very different type of implementation partner and a viable alternative to the existing tier 1 Systems Integrators that could provide innovation and translate "strategy into action" in the Cloud environment.

Certus is recognised globally as a thought leader in Oracle ERP & HCM Cloud and our Executives provide counsel to industry analysts, including Goldman Sachs in America, who have regularly sought our opinion on the Oracle Cloud product suite and on the market in general.

The company was the first in the UK to devise a hybrid implementation approach – engage™ and provide a dedicated support service – engage™ Business Support Services. Certus has two of the company's Executives recognised as Oracle ACEs, one as an ACE Director, the highest specialist accreditation available world-wide and they are constantly active participants on the conference circuit where their opinion is greatly valued. In addition, our Executive have published numerous blogs pertaining to Oracle Cloud, providing real insight into what it is really like on the leading edge of product implementations.

Our deep understanding of Oracle Corporation and our strong links with Oracle Development provides insight that few possess into the workings of one of the largest software companies in the world and something we make sure our customers can benefit from.

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Our Way of Working – We Value Long Term Relationships

Certus looks to develop long term business relationships between itself and its customers. To do this effectively Certus recognises the need to act in the "*spirit of the contract*", as we know from experience this helps in ensuring that the contracted project is successful. Implementations are never black and white, and it is not an unreasonable ask that our clients need more support that we can possibly contract for regarding fringe related tasks.

Our overriding objective as a company is not just to undertake a successful implementation but also to ensure that the customer is happy with both the Oracle Cloud service and Certus as an implementation partner.

Certus aspires for all its clients to be reference-able and become a customer advocate for the organisation. Our reputation and standing is extremely important to ourselves as an organisation and is a foundation stone of our success. We are never complacent and recognise despite our success we are always only as good as our last project.

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Introducing engage™ and engage.gov™

The engage™ Service wrap comprises a full suite of Implementation Services, a templated solution / accelerator for Central Government, and an optional on-going Business Support Service.

engage™ Implementation Services

engage™ comprises a comprehensive end-to-end "service wrap" designed to specifically deliver, deploy and provide on-going support for Oracle© Oracle ERP, HCM and Payroll Cloud.

engage™ not only comprises a templated solution but also:

- an implementation methodology which is focused upon using the power of "discovery" and "customer experience" and the leveraging of best practice business processes embedded in Oracle Cloud upfront, by providing customers insight and knowledge transfer
- professional services comprising Oracle Accredited Cloud Specialists to support the SaaS commissioning lifecycle
- encapsulates our own Intellectual Property (IP) into the Oracle Cloud product set thereby delivering competitive advantage through continuous learning
- physical tools and services to assist in the commissioning process of the service
- and an on-going business support service capability to protect a client's return on investment (Note: this service is optional)

The implementation service comprises six key elements that can be purchased individually or collectively:

- Phase Zero
- engage™ Implementation Services
- engage™ Testing Services
- engage™ Data Migration Services
- engage™ Training Services
- engage™ Business Support Services
- engage™ Cloud Readiness & Adoption Services

engage.gov™

Certus has extensive experience of undertaking Oracle ERP & HCM Cloud implementations. This, when combined with our practical operational knowledge of working with HM Central Government Ministries, Executive Agencies and Arm's Length Bodies we have been able to develop a re-usable templated solution called **engage.gov™**. The Office for National Statistics (ONS) was the first beneficiary of the product and associated implementation approach. The project commenced in January 2016 and went live end of October 2016. This was a landmark implementation as it was the first Oracle Cloud implementation across Central Government. Certus continually enhances its service offering with the latest deployment of engage.gov™ being the implementation of HM Treasury in April 2017.

In July 2017 the Home Office selected Certus, in consortium partnership with Accenture to deliver the Metis Programme using engage.gov™.

engage.gov™ has purposely been designed not to be rigid in design but offer flexibility for additional configuration recognising that "*one size does not fit all*". The purpose of the solution is to promote reuse across government and the Certus approach through prototyping is to constructively challenge an organisation as to why in the first instance the standard template would not be fit for purpose. As a consequence, the engage.gov™ templated solution can be easily modified and used as an accelerator. This approach is deemed more relevant for larger government departments.

Certus is committed to managing the engage.gov™ through ongoing configuration management against twice yearly Oracle Cloud releases, taking on board new cloud functionality and changing government policies and initiatives as well as new legislation reporting. Examples include, but not limited to:

- multi-entity architecture ensuring ERP & HCM data segregation
- Online System Central Accounting Reporting (OSCAR) compliant Chart of Accounts
- Common Payroll Interface extract, specifically for CGI ePayfact Payroll engine
- Alignment to Civil Service Employment Policy
- Reporting Standards to Cabinet Office and Office for National Statistics

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Service Description – Phase Zero

The purpose behind "Phase Zero" is to prepare a customer for transition to the Cloud, ***before*** the technical element of the "discovery" phase commences as part of the implementation. This is an optional component of the engage™ implementation service as it is recognised that not all Clients will need to undertake this exercise. Certus delivers Phase Zero through both specialist Subject Matter Experts in the areas of HR, Payroll, Finance and Procurement as well as Oracle Cloud product experts.

Phase Zero is a "capability assessment" of service delivery, its objectives being to:

- prepare the customer for the journey ahead from a business perspective
- ensure the customer understands the transformation that will be required to support a cloud deployment
- to understand specifically how Oracle© Cloud Applications can be applied to their operational environment to deliver rapid results and real business benefit
- to gain detailed insight and understanding into the product offerings and the key elements that would form the pillars of a business case for implementation
- to achieve a high degree of buy-in and support from key business stakeholders and colleagues
- to equally understand both the challenges that exist within their own environment and also the capabilities that can be leveraged to lead to a successful implementation
- ensure the customer is ready to engage with the technical element of the implementation team from day one
- validate (if required) the supporting business case ensuring benefits identified can be measured and delivered accordingly

Phase Zero has been specifically designed to take a customer quickly from a place of little to no knowledge into the world of Oracle© ERP and HCM Cloud ensuring that at the end of the engagement they are left with a comprehensive understanding of the concepts behind the solution set and how it can be used in their business to deliver real value quickly and effectively.

The overall exercise is condensed to ensure maximum focus is achieved by both the Certus engagement team and the client ensuring at the end of the engagement the client is left with sufficient information and knowledge that can lead to an informed decision making and ready to embark on the Cloud implementation.

The engagement also can involve, but not limited to:

- a high level assessment of the current application landscape
- product demonstrations through "hands-on" Oracle ERP and HCM Cloud
- identification of key business drivers and priorities for future and any business benefits that may have been over looked
- identification and examination of how Oracle Cloud ERP and HCM Applications will affect the customer's existing IT infrastructure
- identification of high level Business Intelligence requirements
- development of a high level roadmap for implementation

The outcomes from the engagement will:

- create awareness within the business around the Oracle Cloud product providing alignment and clarity in thinking through hands-on customer experience
- promote client understanding around the fundamental principles of service delivery, promoting process alignment to industry best practices, facilitating informed decision making
- most importantly provide the Client insight into how Cloud will *transform* its business operation on implementation

The exercise takes approximately 6-12 weeks depending on customer size.

Note: *Phase Zero is delivered in conjunction by Certus Solutions and Accenture. This element of the wrap can be delivered in isolation if required.*

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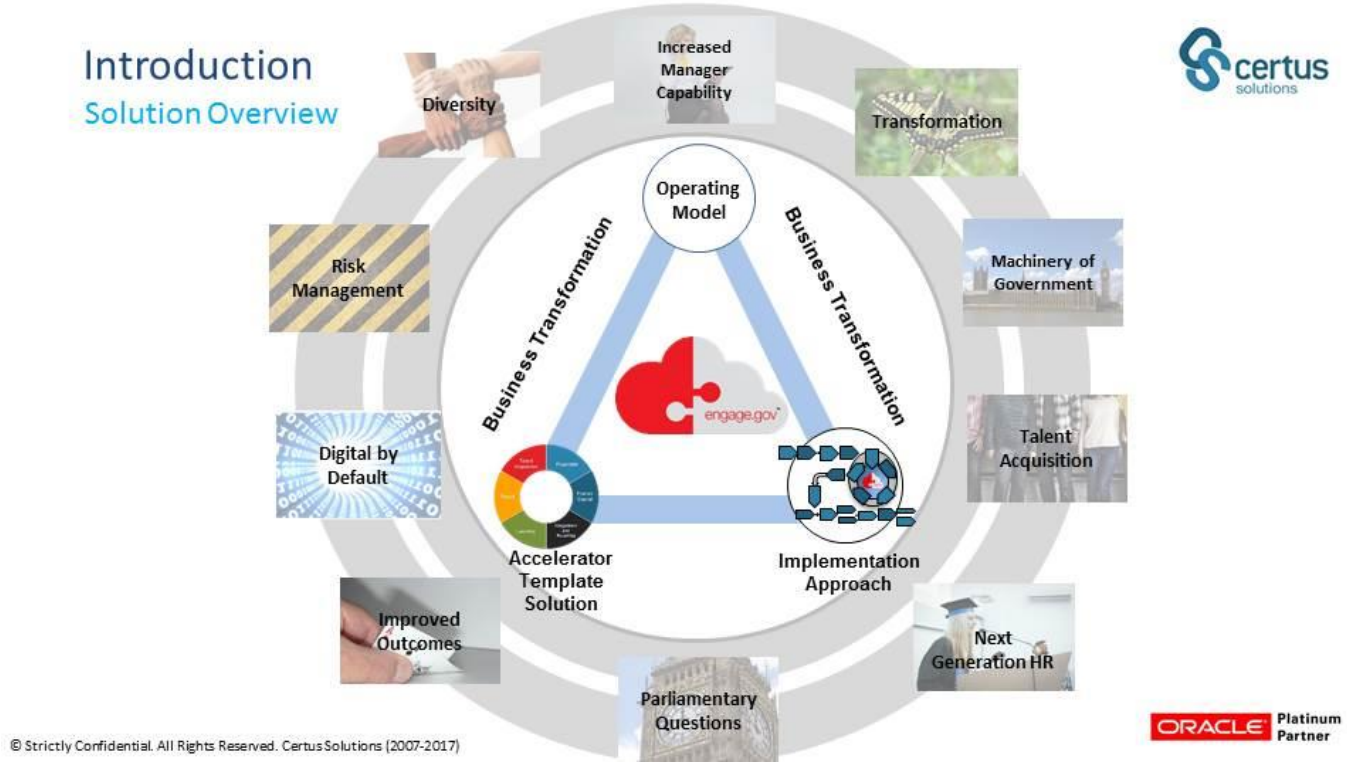
Service Description – engage.gov™ Template / Accelerator

engage.gov™ represents Certus extensive knowledge of the operational workings of HM Government encapsulated into a templated solution that can either be used “as is” or as an accelerator to unlock the power of the Oracle Cloud. The solution specifically looks to address the challenges the Civil Service faces today with managing its back-office processes.

Implementation of Cloud is so much more than just configuring the base SaaS package. However, to ensure maximum benefit is derived from the implementation it is important that the operational framework, the “Future Operating Model” (FOM) is aligned to the functionality and capability of the underlying SaaS technology. It should be accepted that there will be some service gaps that the project team will need to overcome, however an operating model that is not aligned to the SaaS system will cause a myriad of problems, with emphasis on the team to over configure, and extend capability through bespoke development.

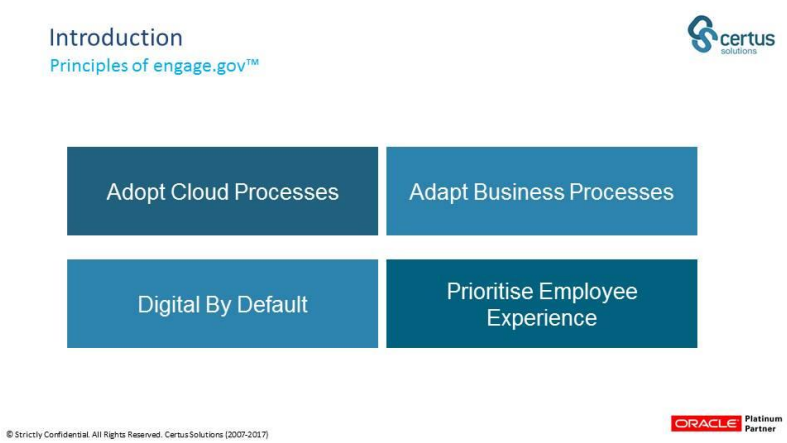


Key to the FOM will be establishing a Cloud Compliant Principles of Design.

Principles of Design

All Cloud projects are business transformation projects. Certus defines transformation in terms of not being able to return to the previous status quo. Transformation needs an organisation’s Executives to act as the change agent and champion the change. Failure to have the correct Executive Sponsorship from the outset will mean the programme will fail.

The “Principles of Design” need to be championed by the Executive and mandated down to the implementation team.



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Solution Offering

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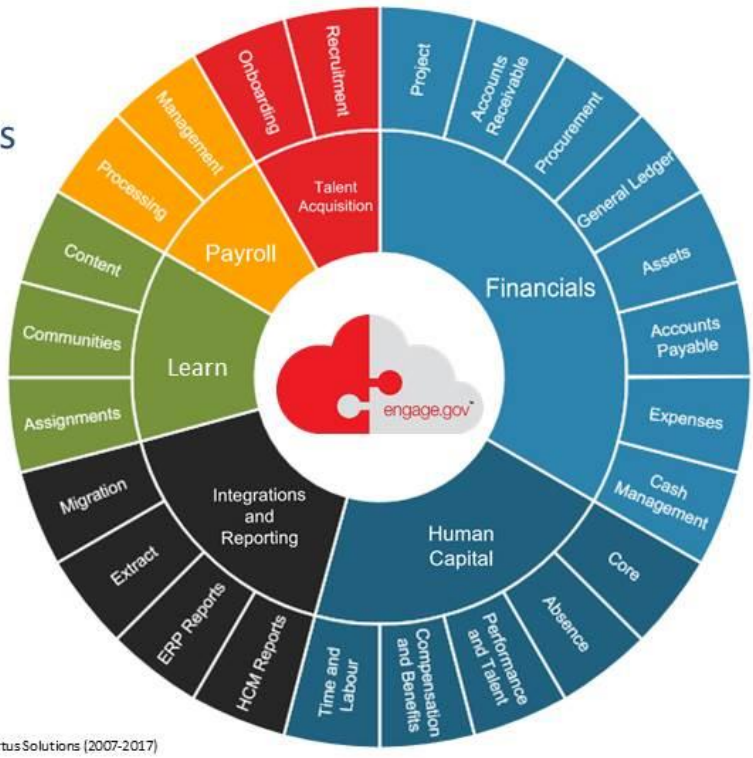
Module Components



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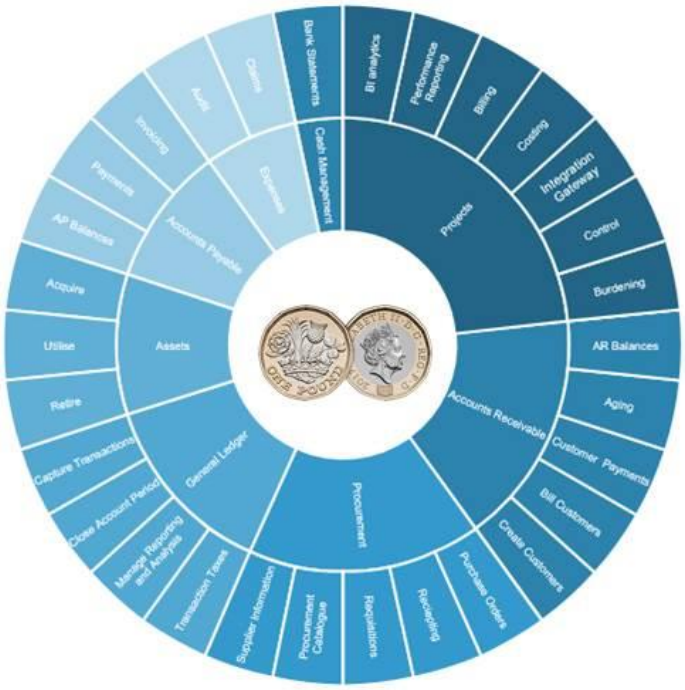

Financials

Receive unprecedented business insight and a revolutionary reporting platform that can change the way that you work by enabling good governance and growth while helping you make better decisions, increase efficiency, reduce costs and continuously innovate

- Projects
- Accounts Receivable
- Procurement
- General Ledger
- Assets
- Accounts Payable
- Expenses
- Cash Management

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Projects

Project Business Intelligence Analytics	Enable business intelligence reporting and analytics capabilities for project management data.
Project Performance Reporting	Configure how you collect and review project performance data against defined performance areas.
Project Billing	Configure how you invoice customers and recognize revenue for project contracts, including contract management, intercompany billing, and the calculation of estimated taxes on invoices.
Project Costing	Configure how you collect, monitor and influence the costs associated with the delivery of the project and management of capital assets.
Project Integration Gateway	Configure how you integrate with third-party scheduling tools such as Primavera P6 Enterprise Project Portfolio Management.
Project Control	Configure how you monitor project execution, progress, budgeting, and forecasting.
Burdening	Configure options used to calculate, group, and apply indirect costs to project expenditure items to report and account for the total cost of a project.

Accounts Receivable

Manage Accounts Receivables Balances	Reconcile to GL and Close Receivables Accounting Period
Aging	Review Bad Debt and perform Write Offs
Process Customer Payments	Process Receipts
	Apply Customer Payments
	Record Accounting for Customer Payments
Bill Customers	Process Billing Adjustments
	Create and Process Bill
	Record Accounting for Billing Transactions
	Present Bill
Create Customers	Create and Maintain Customer Data

Procurement

Manage Purchase Orders	Create Purchase Order
	Approve Purchase Order
	Dispatch Purchase Order
	Mange Purchase Order Lifecycle
	Amend Purchase Order
Receipting	Receive or Correct Receipts
Manage Requisitions	Create Requisition
	Approve Requisition
	Process Requisition Lines
	Manage Requisition Lifecycle
	Amend Requisition
Manage Procurement Catalogue	Manage Procurement Content
Supplier information	Manage Supplier Registrations
	Manage Supplier Profiles

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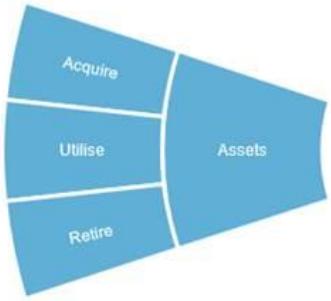
General Ledger

Capture Transactions	Record and Edit Standard Journal Entries
	Approve Journals
	Post Journal Entries and Update Ledger Balances
	Manage Subledgers
	Define Allocations and Period Entries
	Record Allocations and Period Entries
	Manage Intercompany Transactions
Close Account Period	Define Revaluations
	Define Consolidation Components
	Revalue Account Balances
	Translate Multiple Currency Balances
	Reconcile Accounts
	Consolidate Financial Information
	Close Ledgers
Manage Financial Reporting and Analysis	Prepare Financial Reports
	Analyse Financial Performance
Manage Transaction Taxes	Verify Tax Configuration

Assets



Acquire Assets	Record Asset Acquisition
Utilise Assets	Maintain Asset Attributes
	Maintain Asset Financial and Reporting Attributes
	Track Asset Assignment and Location
	Capitalise Assets
	Depreciate Assets
	Process Payment Files
	Revalue Assets
	Report and Reconcile Asset Activities
Retire Assets	Record Asset Retirement
	Record Asset Reinstatement

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Accounts Payable

Manage Invoices	Submit Invoices
	Receive and Process Invoices
	Audit Invoices
	Approve Invoices
	Record Accounting for Invoices
Manage Payments	Prepare and Record Payments
	Process Payment Files
	Record Accounting for Payments
Manage Accounts Payable Balances	Analyse Accounts Payables Balances
	Manage Accounts Payables Disputes
	Close Payables Period

Cash Management

Manage Bank Statements	Create Bank Statement
	Create External Transactions
	Reconcile Bank Statement
	Review Cash Management Reports

Expenses

Expense Claims	Create and Maintain Bank Details
	Submit Expense Reports
	Approve Expense Reports
Expense Audit	Audit Expense Reports
	Process Expense Reports to Payables

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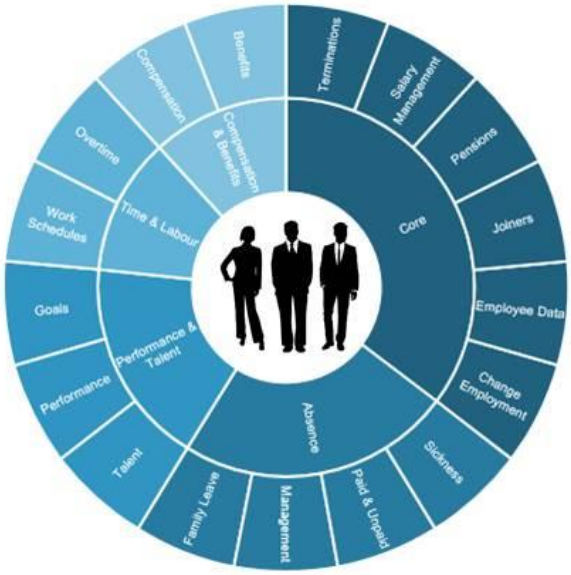
Human Capital



Manage all your human capital via an enhanced user experience and be able to deliver real time embedded analytics to give insight and understanding into your workforce

- Core
- Absence
- Performance and Talent
- Compensation and Benefits
- Time and Labour

ORACLE Platinum Partner

Core

Effectively manage changes in the employee lifecycle from joining to leaving. Maintain and update personal, employment and organisational information

Terminations	TUPE Out / COSOP
	Machinery of Government
	Exit Survey
	OGD Transfer Out
	Exits and Redundancy; Voluntary & Compulsory
	Terminations of Service
	Secondment / Loan Out
Salary Management	Ranges
	Comparatio
	Spine Point Salaries
Pensions	Tapering
	Auto-enrolment
	Opting In/Out Of Pensions
Joiners	Managed Appointments - e.g. SPADS, NEDS
	Conversions - Worker Types (Contingent to Perm)
	Security / Vetting Checks
	Secondment / Loan In
	OGD Transfer In
	Hire Contingent Worker
	Rehires
	New Hire

Platinum Partner

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Core

Employee Data	Change Bank Details
	Management of Different Person Types
	Gender Reassignment
	View & Update Equality & Diversity Data
	Maintain and View Personal Details
Change Employment	Regrade
	Managed Moves
	Overbearing
	Change Work Hours
	Detached Duty
	Work Life Balance / Flexible Working
	Re-organisations
	Relocations (Public Interest Transfers)
	Partial Retirement
	Promotion
	Extension Of Temporary/Fixed Term Appointment
	Change Manager
	Temporary Promotion
	Conversions - Person Types (Fixed Term to Perm)
	Lateral Transfer
	Extension Of Temporary Allowances

ORACLE Platinum Partner

Absences

Provide employees and managers with the ability to request, raise and manage different absence types

Sickness	Extension of Occupational Sick Pay
	Injury at Work
	3rd Party Claim
	Sickness Absence
	Part Time on Medical Grounds
	Sick Pay at Pension Rate (SPPR)
	Injury Leave
Paid & Unpaid	Unauthorised Leave
	Suspension
	Industrial Action
	Unpaid Leave
	Special Paid Leave
	Armed Forces Reservists
Management	Unsatisfactory Attendance
	Occupational Health Data Recording
Family Leave	Shared Parental Leave
	Maternity leave
	Adoption Leave
	Paternity Leave

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Performance and Talent

Ensure employees are engaged and they can enhance their performance. Assess and manage talent in the organisation

Goals	Assess Competencies
	Manage Goals
Performance	Disciplinary Data Recording
	Grievance Data Recording
	Opening Appraisal
	Closing Appraisal
	Mid Year Appraisal
	Performance Improvement Plans
	Managing Probation
Talent	Creating Talent Pools
	Review Talent
	Manage Talent Profiles

Compensation and Benefits

Create and Manage compensation & benefits packages that meet your organisations changing needs

Benefits	Salary Sacrifice - Childcare
	Salary Sacrifice - Cycle
	Beneficial Loans (Bicycle, Season Tickets etc)
	Buying / Selling Annual Leave
	Payment of Advances (e.g Seasonal / New Starter)
Compensation	Fee Payments
	Pay Awards / Increments
	Bonuses
	Payment of Allowances
	Non Executive Director (NED) – Payments
	Payment of Keep in Touch (KIT) days

Time and Labour

Accurately capture and record employee working hours

Overtime
Work Schedules

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Integrations and Reporting

Have the tools and information you need to set up your new system and use it when you have gone go live

- ERP Reports (Financials)
- HCM Reports (Human Capital)
- Migration
- Extract

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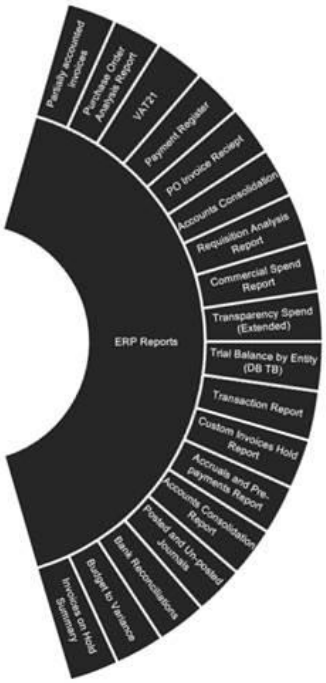
ERP Reports (Financials)



Invoices on Hold Summary Report
Bank Reconciliations Report to Include Unreconciled Transactions
Accruals and Pre-payments Report
Custom Invoices Hold Report
Trial Balance by Entity (DB TB)
Payment Register

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HCM Reports (Human Capital)

ASCES Specification
New Maternity Risk Assessment Required
Annual Leave Detail Report
Sickness Absence Certification Report
Employees Due Back From Long Term Non Sickness Leave
Flexi Leave Detail Report
Missing Family Leave Absence Information
Moderation Report (Talent Ratings Against Diverstiy data)
Dept Hierarchy and Costing
Diversity Data Model
Rolling Absence Report

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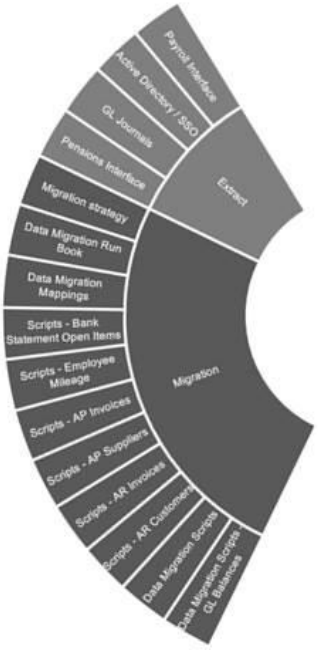

Extract

Payroll Interface
Active Directory / Single Sign On
GL Journals
Pensions Interface

Migration

Migration Strategy
Data Migration Run Book
Data Migration Mappings
Data Migration Scripts - Bank Statement Open Items
Data Migration Scripts - Employee Mileage
Data Migration Scripts - AP Invoices
Data Migration Scripts - AP Suppliers
Data Migration Scripts - AR Invoices
Data Migration Scripts - AR Customers
Data Migration Scripts - Open Purchase Orders
Data Migration Scripts - GL Balances

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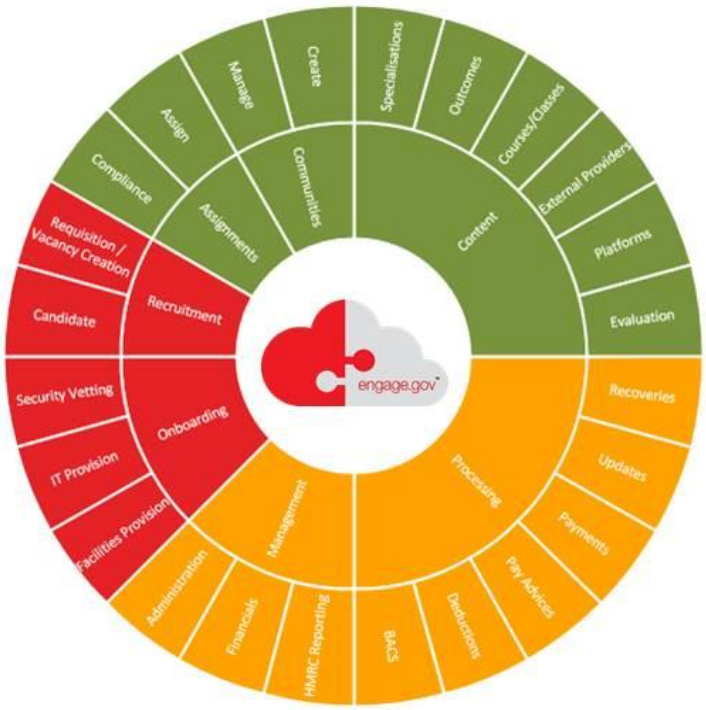

Talent Acquisition

- Recruitment
- Onboarding

Learn

- Content
- Communities
- Assignments

Payroll

- Management
- Processing

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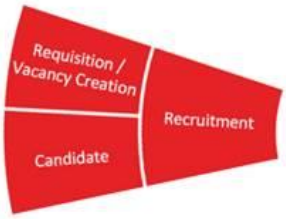

Talent Acquisition

Recruitment

Requisition / Vacancy	Drafting
	Approval
	Review and Update
	Advertising
	Websites / Portals / External Job Boards
Candidate	Application
	Review
	Sifting
	Interviews
	Offer
	Hire

Onboarding

Security Vetting
IT Provision
Facilities Provision

Type of Hire

External Permanent New Starter
Internal Movers (voluntary exc managed)
Permanent Civil Service /OGD Transfer In
Civil Service / OGD Loan In and Return
Fast Stream/Gradudate/Apprenticeship
Contingent Workers
Non-worker

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Payroll

Processing

Recoveries	Process Recovery of Salary Overpayment
	Overpayments Administration
Updates	Process Statutory Changes from Pay
	Process Supplementary Payroll for New Starters
	Payroll Processing
	Process Payroll Costings
	Process Payroll
	Processing Monthly Payroll Including On-Line Payslip
Payments	Process Advances In Salary
	Payments
	Process Allowance Claims
Pay Advices	Administer Payslips
Deductions	Process NI Age Exemption
	Process Additional Voluntary Contributions (AVC)
	Process Direct Earnings Attachment
	Process Court Orders
	Process Earnings Attachments
	Process all 3rd Party Payment / Deductions from Payroll to all Relevant Parties
BACS	Process BACS Returns And Re-Issues
	Execute BACS
	Process BACS Recall

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Payroll

Management

Administration	Payroll Accounting Maintenance
	Payroll Administration
	Pensions Administration
	Payment and Deduction Element Administration
Financials	Process Annual Reconciliation Exercises And Statutory Year End Reporting
	Process Payroll Year End
HMRC Reporting	Real Time Information (RTI)
	Process PAYE Settlement Data
	Process P11D Certificates
	Process P60s and Substitute
	Production of Statutory Outputs
	Complete P35 Online Form And Submit

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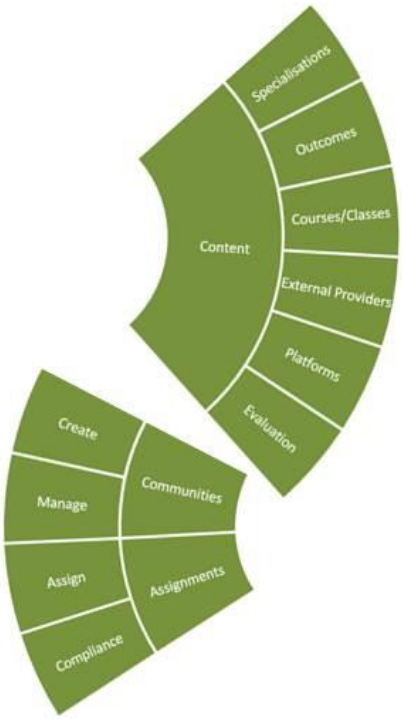

Learn

Content

Specialisations	Learning Items
Outcomes	Competencies Allocation
Courses/Classes	Training Delivery Methods
External Providers	External Content
Platforms	Access Learning Methods
Evaluation	Providing Feedback

Communities

Create	User Groups
	Knowledge Sharing
Manage	Assign Learning Content
	Assign Community Managers

Assignments

Assign	Learning Types
Compliance	Tracking Learning

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Service Description – engage™ Implementation Services

engage™ Implementation Services is the primary service delivery vehicle of the engage™ Service Wrap holistic offering. The approach has been designed to be agile in nature and highly collaborative, between the Client and ourselves, leveraging engage.gov™ template as the initial prototype system.

The engage™ approach is iterative and the activity is focused much more on-system than traditional on-premise deployments. The objective is to demonstrate standard processes by presenting proto-types at an early stage using as much configuration and data as possible, so that all stakeholders are aligned on the agreed solution. Scope of the engagement, deliverable acceptance criteria and associated timelines are to be determined and agreed between Certus and the client before commencement of service delivery.

The typical stages of the lifecycle are outlined overleaf.

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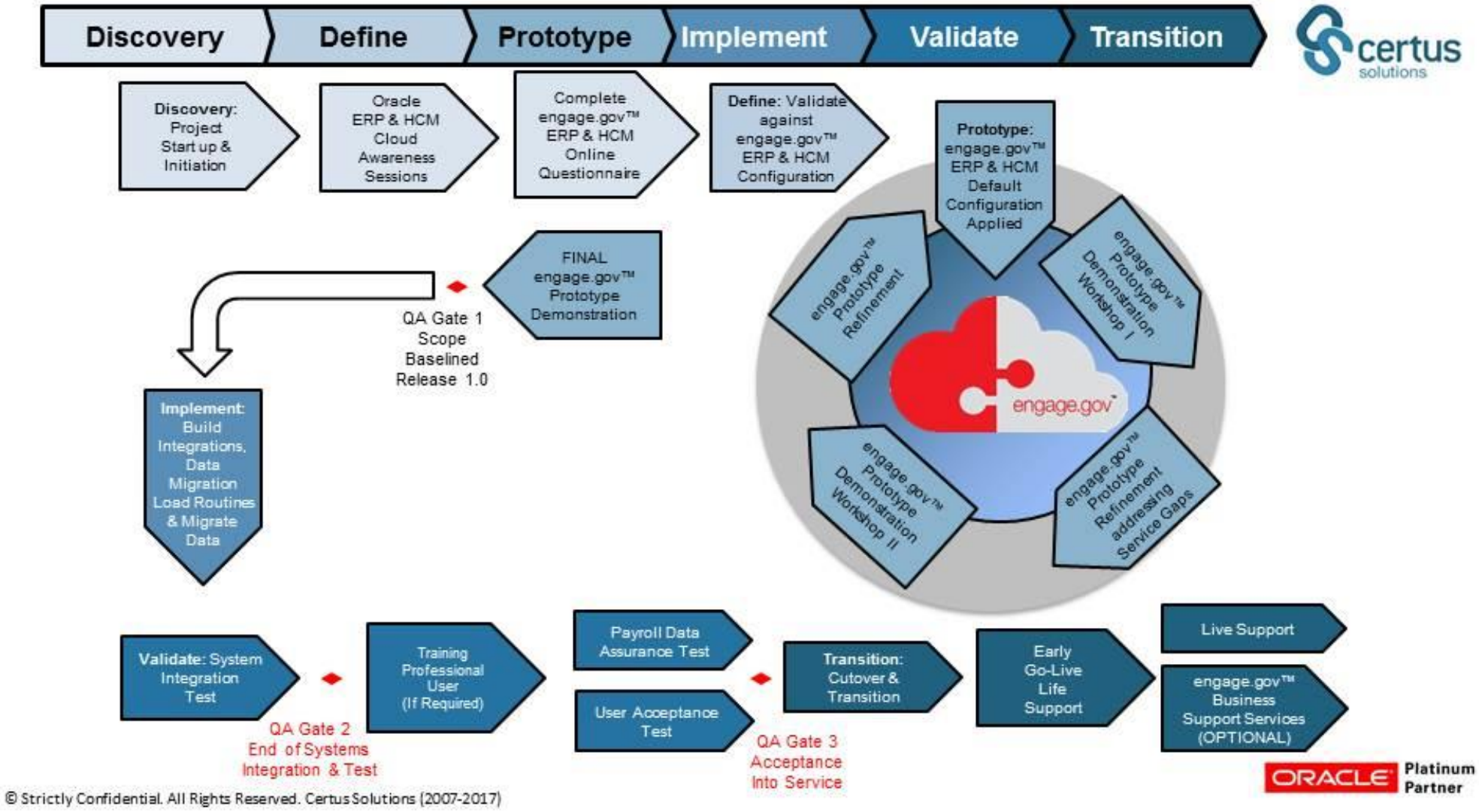
Cloud Service Implementation Lifecycle



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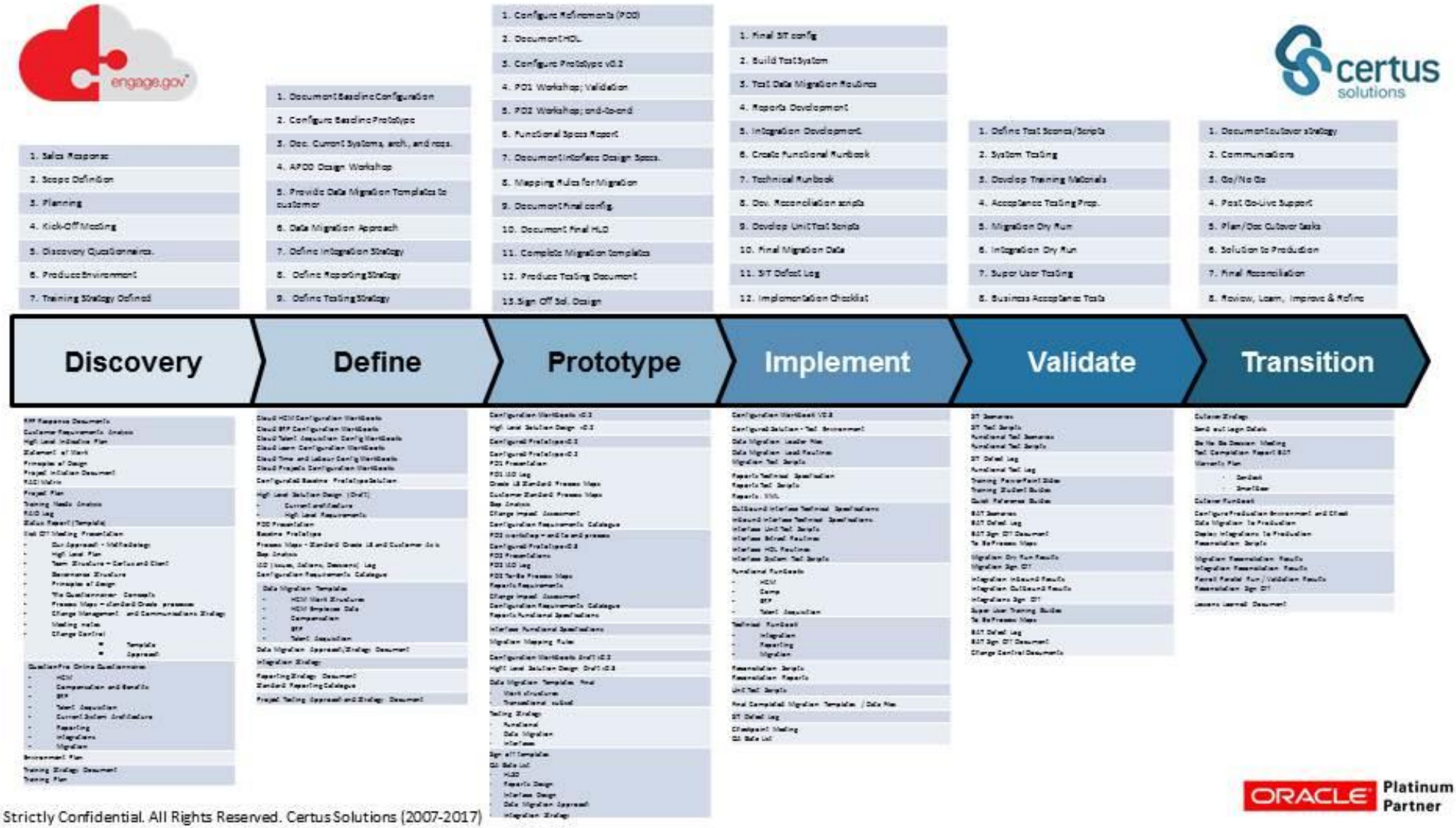

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certus solutions

Project Management

Certus Solutions uses a combination of both agile and traditional project management techniques for the delivery of its engage™ implementation services. From an overall control perspective Certus is committed to using PRINCE2 as a project methodology. Primarily governance is established to ensure costs are controlled and the benefits of an engagement stated are realised.

Certus project governance and control is hierarchical in its nature, with the day-to-day operational management being kept firmly in the remit of the Project Manager who is responsible for progress; dependency management; risk and issues management through a weekly Project Team (often referred to as "Stage Manager's meeting") comprising key project personnel.

Over-arching governance is provided through a Project Board comprising membership from key stakeholders that are determined at the beginning of an engagement. At a minimum, membership will include the client as Senior Responsible Officer (SRO) and Senior User and a representative from all the Senior Suppliers who are required to deliver as part of the project who meet at a minimum once per month to review progress.

Elements of agile project management are used to facilitate the discovery and prototyping of the solution. The use of sprints and backlogs are common techniques used by Certus to support these activities as part of the overall delivery plan.

Risk Management

Certus Solutions uses PRINCE2 as a Project Methodology, and a fundamental part of the methodology is the management of risks and issues.

Regardless of whether a risk exists at project or corporate level regarding the contract; our approach to risk management remains the same where:

- The risk is defined and assigned an owner responsible for managing the risk
- The consequence and Impact of the risk materialising is documented and understood
- The probability of the risk materialising is determined (Low / Medium / High)
- The impact of the risk materialising is determined (Low / Medium / High)
- A RAG (Red/Amber/Green) status is determined based upon probability and impact
- The financial impact of the risk (estimated over a min-max range)
- The appropriate mitigation is determined
- An audit trail is determined recording progress against risk mitigation by the risk owner

In any project, despite mitigation efforts, risks can materialise into issues. All issues are captured on the project's risk and issue log, and assigned an owner and a corresponding RAG (Red / Amber / Green) status, determined through a combination of probability and impact of the issue arising. These criteria are determined in advance by either a department's local standards for risk management or by the Project Board itself governing the delivery of the engagement.

Escalation

Our approach is to work with the issue owner locally to seek resolution. If this cannot be achieved the issue is escalated to the weekly internal project meetings for further discussion and resolution. Again, if the wider project community cannot resolve the issue it is flagged for discussion at the next Project Board. If the Project Board cannot resolve the issue, it is escalated to the Contracting Body Programme Management and overall controlling Authority.

This structured approach to issue resolution allows each level of the project's operational structure to attempt to resolve the issue without the need to escalate. The above approach is proven and Certus has used this setup repeatedly on all its projects both in the private and public sector since its conception. We very much see this as a case of best practice in action.

Certus excels at managing risk, it is a fundamental foundation in everything we do, and consequently our clients benefit from our insight and experience in this area.

Governance External

All client engagements are reviewed weekly at the Certus Operational Board meeting. In so doing our clients benefit from the insight from the entire Executive Management team in identifying any risks that may prevent delivery under the contract.

When risks and issues are identified, they are not only fed back to the engagements formal governance channels (Programme and Project Boards) but if warranted are also entered onto our own corporate risk and issue log. This way specific risks and issues relating to the contract and the organisation's performance in terms of client delivery are tracked and monitored on an on-going basis at an executive level within Certus.

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Service Description – engage™ Testing Services

As part of the engage™ Service Wrap Certus can provide clients the full scope of testing services as either part of the engage™ Implementation or as a stand-alone service offering.

Testing Services

Even in the world of Software as a Service (SaaS), testing is still a key element of any implementation. Strict governance around testing and a systematic and structured approach must still be adopted to ensure that errors and issues are detected early and there is a corresponding reduction in the cost, complexity and impact on other project deliverables of remedial work.

A progressive approach to the internally owned testing stages is still adopted by Certus during the project lifecycle including the design and build stages, this mitigates the risk of a high defect ratio during the later phases. Test stages and scope of each phase to be executed during the project will be agreed with the Client with internal test phases undertaken prior to final handover.

Our overall approach to testing follows the following key principles: Business Process Driven; Customer Experience and Risk Based Testing:

Business Process Driven

All dynamic phases of functional testing i.e. System, Integration and User Acceptance are conducted from a business perspective, rather than a technical perspective. This ensures that the final solution is ultimately viable to the business operation. User acceptance test documentation is written in accordance with the entire business process, both off system and on system and uses work instructions and other user documentation as will be used in live operational running. The purpose of this is to ensure user documentation is also tested during testing, promotes usability testing and ensures that the live operation is tested rather than just the system.

Customer Experience

The customer experience in Cloud is particularly relevant when a programme / project reaches User Acceptance Testing. UAT focuses upon end–to-end testing, and ensures that not only that the system works as designed, but also that all aspects of the off-system processes that are initiated and finish with the customer are tested effectively. UAT is fundamentally about ensuring “People, Process and Technology” are all aligned. Hence Certus in developing its test approach focuses heavily on the customer experience and how the customer interacts with the service.

Risk Based Testing for Test Prioritisation and Scheduling

Each test script and scenario is assigned an indicator as to its criticality to the business. Each test is then scheduled in accordance with its’ criticality, this mitigates the risk of critical defects being found too late in the testing lifecycle being fixed.

Test Stages

Unit and System Testing are performed to validate the solution from a technical and configuration perspective to ensure that the solution has been built as per the design. System Integration testing is performed to validate the solution from a functional and operational perspective, test cases are designed against the end-to-end business processes including integration to ensure that the solution integrates with 3rd parties and will work for operationally.

Due to our experience in Oracle Cloud applications, Certus provides mature best practice testing processes without the delay of defining test processes and producing test artefacts from beginning to end. Certus provides ready-to-use templates, processes and tools pre-configured to operate proven mature testing processes. This avoids up front delays and costs in set up and re-invention of processes and tools to manage the test lifecycle. The capacity can scale to meet each of the projects or programmes need ensuring a pragmatic, risk based approach to testing so the cost of quality is not disproportionate to the overall cost of the programme.

The purpose of User Acceptance Testing is for the Client to validate the solution works in the operational environment. This would therefore need to include the validation of the end to end business processes to validate these will work in the operational environment;

UAT needs to be performed on live data in the secure SaaS Staging environment for the purpose of testing the payroll extracts. This can only be undertaken properly using live data.

Certus provides support throughout the customer testing lifecycle for defect fixes and involvement in defect scrubs. This can be extended to include the overall Management of UAT, production of test artefacts or involvement in evidence based test execution if so required.

Cloud Upgrades

Oracle provides a Staging environment for configuration and test purposes. Upgrades and patches are released into the staging environment prior to production to enable validation prior to live release.

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Service Description – engage™ Data Migration Services

Data Migration is a key enabling activity in moving to the Cloud. Recognising most the Government estate uses Oracle E-Business Suite R11 based Certus has developed a Data Migration Engine specifically for migrating ERP (Financials) and HCM data into the Cloud.

engage™ Data Migration Services

engage.gov™ Data Migration Services come with a proven accelerator solution for migration of data from Oracle E-Business Suite to Oracle Cloud. The solution was originally built for the ONS and subsequently enhanced for HM Treasury. For areas that are currently not covered by the accelerator Certus will look as part of the implementation to extend its capability.

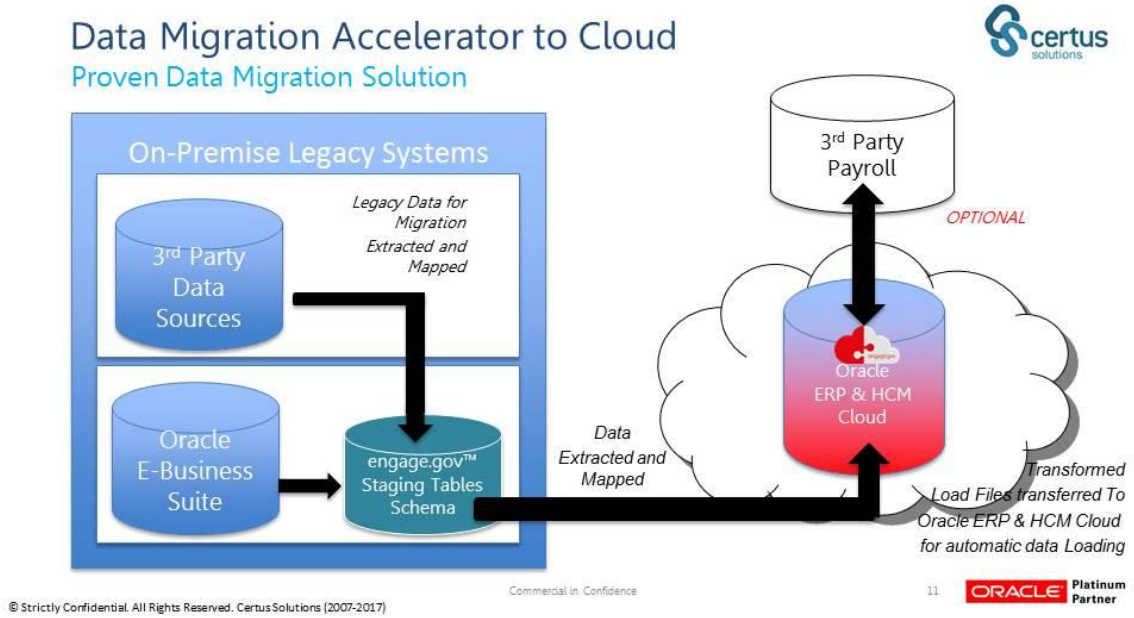
The aim of the Data Migration into an Oracle Cloud solution should be no different to a traditional migration to a new ERP and HCM system. The correct data must be migrated to support all the business functions within the new system, undergoing any mapping required to transform the data from old to new structures. It is important to understand and agree what data is required in the new system to meet the day to day requirements of the business functions and how historical, legislative and business critical reporting requirements will be met.

Whilst our aim, as stated above, does not change due to Oracle Cloud, our approach does alter. The Certus data migration approach for implementation of Oracle Cloud Finance and HCM adopts a straightforward path from Oracle E-Business and provides reconciliation information and timings at each stage to retain the confidence in the process and estimate the duration of future loads.

The recognised methods for data migration into Oracle Cloud (File Based Loader, HCM Data Loader and Payroll Batch Loader) require data files to be produced and uploaded to the Universal Content Manager (UCM) product in the pre-defined file formats. Whilst it would be possible to extract data and manipulate these data files to meet the requirements of the file format, the better approach is to format the data within an Oracle database.

Our deep knowledge and understanding of the E-Business solution and database, combined with the ability to build custom schema and tables, make the existing E-Business Oracle database, the best place to perform most of the Migration activity.

Adopting this approach allows Certus to "customise" their E-Business to Cloud Migration approach for each Client so that the nuances and specific data requirements are not lost, in fact, these become the main focus of the migration activity as the entities undergoing straightforward migration are already following a tried and tested migration path.



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The stages documented below, outline the process that is followed for each migration:

- Scope the migration
- Extract data from EBS tables to Staging tables
- Validate/Reconcile extracted Data
- Correct / Cleanse Data where required
- Extract data from Staging to .zip file or populate Spreadsheet for upload
- HCM Data load the ".zip" files into Oracle Cloud
- Final Reconciliation

Stage 1: Scoping the Migration
To initiate the process of data Migration, Certus need to understand exactly what data is required in the Oracle Cloud solution. As well as identifying the entities to be migrated, customers must give consideration to the amount of historical data that is to be migrated. Certus will be involved in this process to explain the implications of each decision and assist with determining the best way forward. Part of the process will involve gathering migration volumes for each data entity and identifying the areas that require data cleansing prior to migration.

Technical Aspects: A new database schema is defined in the current E-Business system containing the data to be migrated. The schema is used to create database tables that directly map onto the file formats expected by Oracle Cloud. These are known as the Staging tables. The Certus migration solution has determined many these but additional tables may be required.

Stage 2: Extract to Staging Tables
From a customer's perspective, this stage involves the re-structuring or mapping of existing data such that it matches the decisions made in workshops. E.g. a change to the Chart of Accounts would necessitate new rules to "map" existing Account combinations onto the new structure. Certus Functional experts will define the rules that need to be applied to the data extraction processes.

Technical Aspects: A significant amount of code has been written to take data from the key data entities in Oracle E-Business and map it into the Staging Tables. The process transforms this data into this Staging Tables structure using the pre-determined rules. Some specific coding will be required to meet a customer's specific migration requirements.

Stage 3: Validation
The data has been extracted and mapped to the Oracle Cloud data structures at this stage. This is an early opportunity to reconcile the data in Oracle E-Business with the data planned for Oracle Cloud.

Technical Aspects: A series of reports run on the Oracle E-Business Oracle database to compare the existing data with the mapped data and highlight any discrepancies

Stage 4: Correct / Cleanse Data
The results from Stage 3 will highlight issues where action is required on the existing data or the migration process so far. Certus Functional experts and/or Technical consultants will resolve the issues and relevant sections of Stages 1 to 3 will be reprocessed to ensure the staging table data is correct.

Technical Aspects: Amend any extraction or mapping rules altered due to Stage 3 output. Correct any extraction code coding errors.

Stage 5: Extract Data to Zip File
This stage is essentially a technical activity. Technical Aspects: The data loading tools provided by Oracle for uploading significant amounts of data require data files to be transferred to the UCM component Oracle Cloud. Code has been developed to extract the data from each staging table and build the data files in the format required. The files are then transferred to UCM for the next stage.

Stage 6: Load Zip Files into Oracle Cloud
This stage is essentially a technical activity. Technical Aspects: Using functions available within the Oracle Cloud solution each data file is uploaded from UCM and processed by standard Oracle processes. The data is taken record by record and loaded into the data entities within Oracle Cloud. Validation is undertaken by the processes to ensure that business rules are met.

Stage 7: Reconciliation
The data loaded into Oracle Cloud, should match the data residing in the Staging tables. Reports must be executed to confirm 2 things: 1) the right numbers of records have been loaded into Oracle Cloud for each data entity, 2) every record has been loaded as expected and each field that was expecting data has received in in the correct format. A satisfactory result for Stage 7 reports will result in a Migration sign-off.

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Service Description - engage™ Cloud Readiness & Adoption Services

Communicate **E**ngage **R**espond **T**rain **U**tilise **S**trengthen

engage™ Cloud Readiness & Adoption Services

engage™ incorporates our learnings and subsequent business transformation strategy for implementing Oracle Cloud to ensure an organisation has the best chance of making a successful transformation. From a business perspective Change Management is all about the people side of change. More specifically Change Management as a discipline can be defined as:

- the application of a structured process and set of tools for leading the people side of change to achieve a desired outcome
- a process used by project teams and change management practitioners to manage the people side of system, process and organisational changes
- a competency to help employees through the transition from the current state to the future state
- a strategic capability to accelerate changes within an organisation.

Prosci® - Professional Science

At Certus, we have chosen to adopt a methodology created by Jeff Hiatt in the late 1990s based on his research. Hiatt was previously an engineer and program manager with Bell Labs in the US. His **Prosci® (Professional Science)** methodology answers the questions:

- Why do some changes fail where others succeed?
- How can we make sense of the many methods and tactics for managing change?
- How can we lead change successfully?

ADKAR Model

The answers surprising lie in how we think about facilitating change for just one person and how that person experiences change. This concept is the basis for Hiatt's ADKAR model. **ADKAR stands for Awareness, Desire, Knowledge, Ability, Reinforcement.** In this model, each person goes through this series of sequential steps in their adoption of change.

In thinking about how to apply the Prosci® Change Management methodology to facilitate a change to Cloud technology for individuals, we can restate the ADKAR concepts as an easy to remember acronym for Certus. At **Certus** the components of successful change are to:

Communicate **E**ngage **R**espond **T**rain **U**tilise **S**trengthen

Step 1 - Communicate

Ensuring that people are aware of impending changes is important in minimising any resistance to change. Resistance happens when people lack awareness of the business reason for the change. Therefore, people need to be aware of:

- What is the nature of the change to Oracle Cloud?
- How does this align with the vision of the organisation?
- Why is the change being made – and why now?
- What is the risk of not changing?
- How will the change to Cloud technology impact the organisation?
- What is in it for me (WIIFM)?

This stage of Communication aligns with the **Discovery** section of the engage™ implementation methodology when the kick-off meeting usually occurs. At this stage, some aspects of Cloud technology may seem alien, especially to a traditional organisation used to designing and implementing bespoke solutions. If we can clearly answer the questions above, the answers can be included in messages to the project team and to the wider audience that the new Cloud-based system will provide benefits to their organisation. That is, we are creating the key messages that can be carried through the entire project from the Sponsor through to the line managers of the business. In terms of delivery, research has shown that messages sent from either the group head or the employee's immediate supervisor are best received by the employee.

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Deliverables	
Change Management Strategy and Structure	Communication Strategy and Key Messages
Communication Checklist	Communication Plan

Step 2 - Engage

As people become aware of change their view on the change may be influenced by:

- How they view the current state – are they strongly invested in the status quo?
- How they perceive problems – as a threat, opportunity or both?
- The credibility of the sender of messages
- The organisational history of implementing change
- The circulation of misinformation and rumour
- Internal challenges

While people may now have had a communication of the impending change to Cloud, the next stage is their desire to migrate people, processes and systems to utilise the new technology. So how do we engage them and create the desire for change?

The factors of how the migration to Cloud technology will impact each person may include possible organisational structure or job changes. How people respond to change may also include what intrinsic motivators he or she has (e.g., their desire to help others and the business). Therefore, at this stage, it is important for the Sponsor to build a Sponsorship Coalition to ensure that the key messages agreed in the Communication stage are delivered throughout the business to help engage employees and address any concerns.

For project teams, the Engage stage runs parallel with the **Design** stage of the Certus engage™ implementation methodology. At this stage, Prototype Demonstration (PD) workshops will be delivered for the project teams. During the workshops, we have the opportunity of engaging and exciting project team members with quick turn-around of prototypes and applying feedback for the configuration of the system, and defining interfaces with other systems and outlining report specifications.

SMEs and Super Users that are identified will be instrumental in contributing to the business knowledge necessary for the system configuration. In addition, SMEs and process managers should understand how the migration to Cloud technology will impact current processes procedures in the business. Finally, the business can begin to identify the specific training needs for each group of managers and employees throughout the organisation.

Deliverables	
Sponsorship Roadmap	Engaging SME's and Super users
Impact Analysis on Current Processes	Training Needs Analysis

Step 3 - Respond

The Respond stage of the Certus model aligns with the **Implementation** stage of the Certus engage™ methodology. While the project teams are building the Cloud-based solution based upon the finalised configuration and the High-Level Solutions Design, the Change Management teams will be considering in line with Cloud solutions:

- The current knowledge base of the individual audiences and capacity or capability to gain additional knowledge
- The resources available for education and training
- Access to or the existence of the required knowledge

At this stage the business needs to consider the full implementation of the change so that the business objectives are met. Sharing information with employees may not be enough. We need to understand how the information in the first stages of our model are being received, ensure key messages are repeated, and understand and respond to resistance and anticipate and barriers to change. Research indicates that the top five reasons that Managers resist change are: Perceived loss of power, responsibility, resources; Overburdened with responsibility and workload; Lack of awareness for the needs for change; Lack of skills needed to manage change; Uncertainty about the change being made.

In all these cases the business needs to remove the obstacles and respond effectively. It is important to assist managers and supervisors by thinking through solutions together to address these concerns. Sponsors in the business who have a high degree of trust and respect can make a personal appeal.

Deliverables	
Resistance Management Plan	Coaching Plan
Training Plan	

The objective of these plans is to mitigate any resistance anticipated by change managers and ensure that Managers and Supervisors have the skills to be change leaders, in addition to planning for the rollout of training deliverables for the wider audiences.

Step 4 - Train

The first three steps of the Certus methodology for change management have related to the understanding the 'What' and 'Why' of implementing a Cloud-based solution. These steps are fundamental pre-requisites to any change management programme.

Once everyone understands what the changes are and why they are important to the business, we can then begin the next stage of the Certus model, the Train stage, which is related to the 'How.' In terms of the Certus engage™ methodology for process and technology we are in the **Validation** stage.

The Train stage consists of:

- Training on the new system beginning with training for User Acceptance Testing (UAT).
- Detailed information on how to use new processes, systems and tools effectively
- Understanding of the new roles and responsibilities associated with the Cloud technology.

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In Cloud this means:

- An understanding of the business objectives
- How to use and maintain the new system
- How processes will change
- How to prepare for the new job roles that may be associated with process changes
- An understanding of the cost-benefit return on investment (ROI)

Deliverables	
Confirmation of populations. timings, venues for the various training activities	Confirmation methods and trainers
Developed and assembled training materials	Confirmation with employees
Presentations	Gathering Feedback

Step 5 - Utilise

While training is instrumental to new systems implementations, it has been our experience that training itself does not automatically lead to ability or full utilisation. This stage aligns with the Certus engage™ methodology **Transition** step.

Research has shown that adults only remember a fraction of their training depending on how the knowledge transfer process is conducted. For example, in a typical training session, individuals will retain: a small fraction of what they read; slightly more in what they hear and half of what they do.

Therefore, people must utilise the knowledge from the training to gain the ability to achieve desired business objectives. If an individual cannot utilise the needed skills in the time-frame available, then the planned changes may fail. Although the business may have delivered effective training and education programmes mentioned in the previous stages, in the utilisation stage, questions may arise from users that did not come up in training. This is also a transition stage where many old processes will need to be used concurrently with new processes and systems.

Techniques that can help employees at this stage are: Removal of any barriers that prevent the utilising the new system; Allocating time for the appropriate users to utilise the new system before go live; Checklists and templates; On-line help files and Reference guides.

Deliverables	
Easily accessible system information	Confirmation of support and escalation routes
Process Documentation	Go-Live Communications
Continued Sponsorship and Coaching Activities	

Stage 6 - Strengthen

After go live it is important to deliver actions and events to strengthen and reinforce the change within the organisation. This includes: Private or public recognition; Rewards; Group celebrations and Personal acknowledgement of progress

It is worth noting that personal recognition, “thank you” messages, and appreciation has been cited as the number one outcome valued by customer service representatives if the recognition comes from someone the person respects. The benefits of strengthening activities after the migration to Cloud include:

- Sustaining the new ways of working and preventing people slipping back into old behaviours
- Keeping up momentum during change
- Creating a positive history for the next change

However, these reinforcements must be Meaningful; Associated with the actual consequences of change; With negative consequences for not changing; and with accountability mechanisms in place.

The deliverable from Strengthening activities which aligns with the **Support** stage of the Certus engage™ methodology:

Deliverables	
Feedback from the employee and managers	Change scorecard
Audit and performance measures	Feedback learnt document

In summary, successful change is only realised when:

- The organisation transitions through each stage of the Change Management model so that individuals can personally implement the changes associated with Oracle Cloud technology successfully
- The organisation achieves the benefits of Cloud technology so that business objectives are met
- Support is in place to strengthen these changes for continuous improvement

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Service Description - engage™ Business Support Services

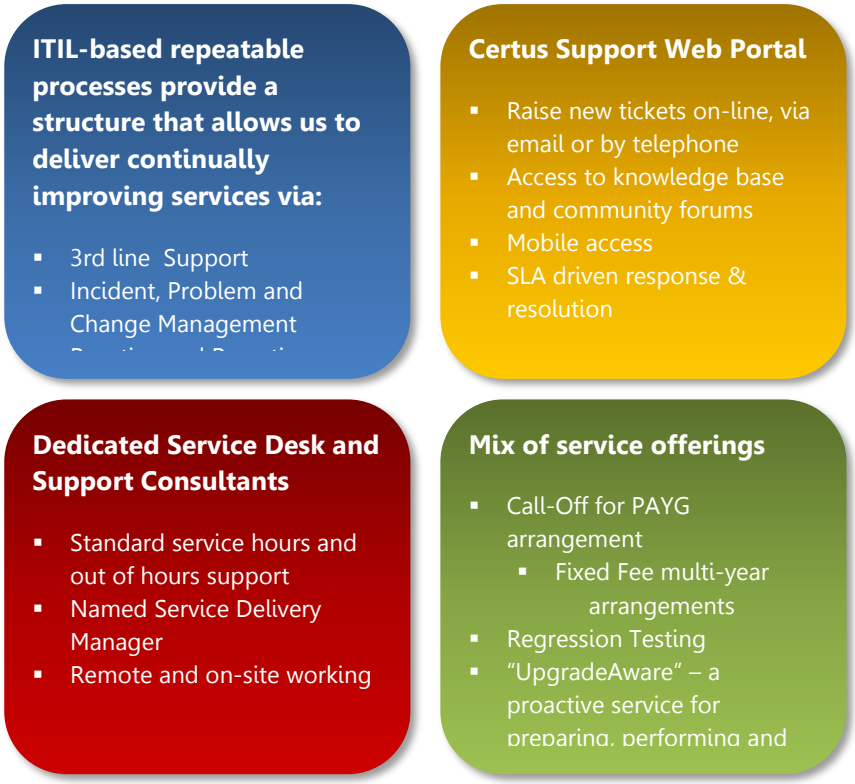
engage™ Business Support Services is a comprehensive application support service designed to protect a customer's investment and provide easy access to a broad range of expertise. It is 100% focused on the support of Oracle Cloud Applications and provides access to unrivalled levels of expertise which makes Certus the perfect support partner for Oracle Cloud customers

engage™ Business Support Services

engage™ Business Support Services Service Management is one of Certus core competencies. Certus processes are ISO9001 compliant repeatable processes providing a structure that allows us to protect our customer's investment in Oracle Cloud Services and to deliver continually improving services via:

- **Third Line Business Level Support**
  - Business Level Support monitors and assesses service, providing support to customer base through a front-line service within the cloud
- **Continual Support, Improvement and Upgrade Service**
  - Provides a holistic and proactive support package, with constant reviews and consultation to help exploit and maximise the vast opportunities that Oracle Cloud Applications innovation provides through twice yearly upgrades
- **Continual Solution Assurance**
  - Provides functional 'how to' support to an organisation's user base, and continual advice and guidance on maximising the investment within Oracle Cloud Applications based solutions.

Service Overview



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Support Elements
Certus offer a range of support services to suit each customer's unique needs.

Support Element	Description
Service Delivery Management	To monitor the service and ensure expectations are being met
Service Desk	Access support via telephone, web portal, email and Twitter
Fix-on-fail	Investigation and resolution of any unexpected failures
How To's	Any question in relation to the use of the in-scope modules
Change Requests	Changes and enhancements to the solution such as integrations, reports and additional configuration
Training	Formal training or ad-hoc knowledge transfer sessions
Upgrade Planning	Proactive planning and preparation for upgrades including arrangements with software vendor on preferred outages and patch timings, environments etc.
Regression Testing	Regression testing following product upgrades or major patches
Release Management	Deployment of fixes into test or staging areas and then management of approval and release into Live

Upgrade Aware
A core component of the service is the end-to-end management and co-ordination of the Cloud Release Upgrade process. In the Cloud world, software upgrades are much more frequent than they were with on-premise software. Certus has devised the Upgrade Aware service as a cornerstone to the engage® Business Support offering.

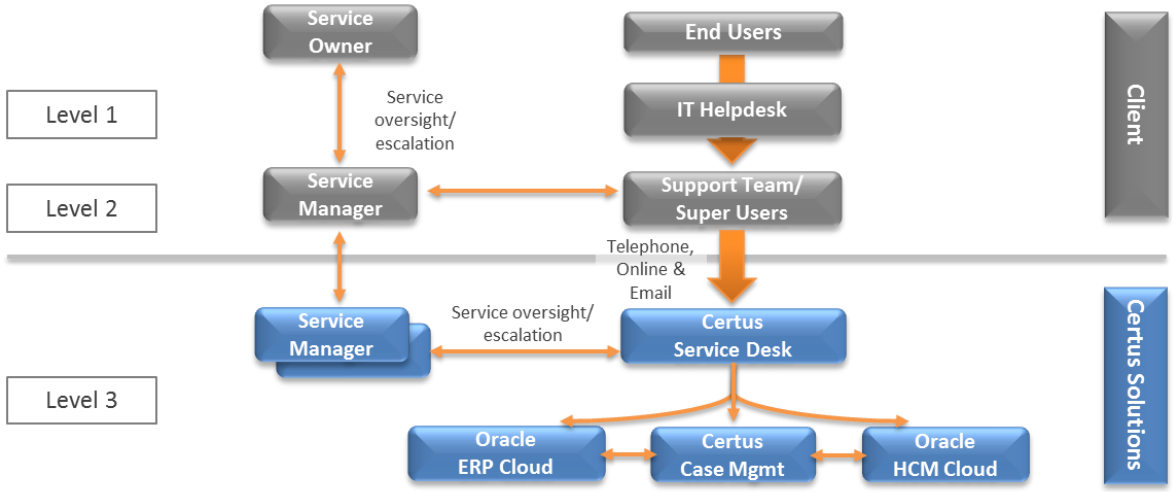
The Upgrade Aware service has the following key benefits:

- All Oracle Cloud customers will face two significant updates to their software every year
- Certus will deliver the same upgrade for many customers, which makes us more knowledgeable and experienced than any one customer
- Certus is often aware of potential issues (and the fixes) before you start, reducing the risk and duration of the upgrade
- Certus will retain and maintain the regression test scripts and can execute the scripts on the customer's behalf
- Certus will become very knowledgeable of your system and your business challenges enabling us to highlight new features that will give direct benefit to your business

In short, Certus concentrates on your upgrade so you can concentrate on your business.

Certus Service Desk
The Certus Service Desk is operated by a dedicated team of support consultants and based on ITIL best practice business processes to provide an efficient and consistent level of service. The Service Desk is underpinned by a leading-edge ticketing system that provides a range of customer channels for managing tickets.

Customers can raise and track tickets via the secure on-line portal, via email or over the phone. The Service Desk is also accessible via a mobile-friendly web-site so that tickets can be tracked on the move. Access the Certus Knowledge Base and join the Community to collaborate with other Oracle Cloud users and see announcements, such as patch updates or upcoming events. The diagram below illustrates the typical support model and how we interact with our customers.



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Service Levels

Certus are measured against the following Service Level Agreements. Additional hours of cover can be arranged for non-standard business hours and for customers who require global support.

Incident Severity	Response Time	Resolution Time*	Hours of Cover
Urgent	30 minutes	8 hours	9-5 Mon-Fri
High	2 hours	48 hours	9-5 Mon-Fri
Normal	4 hours	72 hours	9-5 Mon-Fri
Low	4 hours	Case by case	9-5 Mon-Fri

* Support activities undertaken using Call-Off Time will be identical to those under Fixed-fee but will exclude Resolution time commitments. Resolution SLA does not apply to Call-Off Time services.

Service Delivery Management

Certus will allocate a Service Delivery Manager ("SDM") to undertake the following activities:

- Undertake a support process review. Certus support processes are reviewed with the Client and modified to integrate with the Client's internal procedures
- Act as prime point of escalation for the Client for operational matters relating to the support service
- Will produce a support Service Review report
    - Produced on a quarterly basis and circulated to designated Client contacts
    - Report will detail incidents logged, resolved and open
    - Report will show key performance indicator information
    - Report will include utilisation reports on the usage of Call-off time
- Will attend Service Review meetings with the designated Client relationship manager
    - Discuss activities that have taken place in the previous period
    - Explore areas for improvement and lessons learnt
    - Review planned activities for the next period

Support Commercial Models

There are two commercial models; Call-off and Fixed Fee.

Call-off is like a Pay-as-you-go mobile phone, where you purchase a bundle of time to use whenever and on whatever you want

- The customer pays up-front for a bundle of time
- Certus draw down against the bundle when delivering support to the customer
- The time can be used for anything from how-to questions to upgrades
- This model suits customers who don't want to be tied in to long term arrangements and who are unsure of the level of support they may require over the long term

Fixed Fee is a typically a 1, 3 or 5-year contract based on an estimate of how much time is needed to support the systems in scope

- The customer pays quarterly in advance
- Certus will investigate and resolve failures without additional charge
- Additional work orders or call-off time can be purchased for small projects, or change requests
- This model suits customers who require peace of mind over the long term and who require SLA driven resolutions

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