Oracle Implementation Update

Audit Committee Sub-Group

11 September 2025

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Programme delivery principles

Oracle is currently being implemented based on a phased roll out of functionality as follows:

- Phase 1 EPM (Enterprise Performance Management) – further split into multiple small roll outs. c. 125 staff affected
- Phase 2 Finance (with dependant HR processes), Procurement, Recruitment and Helpdesk modules. c. 1,500 staff affected
- Phase 3 Payroll and all remaining HR processes. c. 10,000 staff affected

And to take an 'adopt not adapt' approach

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Phase 1 – EPM

- The EPM (Workforce Planning and Revenue Monitoring) phase only affects c. 125 users, contained largely within the Finance team. The first module successfully went live in September 2024.

- Since then, many modules for EPM are now live, and have been well received by the finance team such as revenue monitoring, capital monitoring and virements.

- Budgeting is currently being built and demoed and is on track to be in place in time for the 2026/27 budgeting cycle.

- Lessons learned from Phase 1 were fed into Phase 2.

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Phase 2

- Phase 2 (Finance, Procurement, Helpdesk and Recruitment) successfully went live as planned on 17 April 2025.

- Update since the May Sub-Group meeting is as follows:
  - The programme has successfully undertaken a series of 'firsts' such as a direct debit run, a payment run, a month end, a quarter end and a quarterly Oracle update cycle.
  - Whilst there have been inevitable issues, volumes have been significantly lower than other implementations and the support model has responded to them
  - In the Hypercare period there was an average of 17 incidents logged per day and this has fallen to fewer than 10 incidents per day since Hypercare, as the system stabilised
  - The programme has continued to roll out training to a variety of users and has expanded out the information available through Oracle Guided Learning (OGL). User take up has been positive.
  - Internal audit are reviewing work on the control environment relating to phase 2, this includes around permissions applied to users and the processes operating around integrations. Internal audit have found that progress is being made in these areas. The outcome of this work will be reported to Audit Committee in the usual way.
  - Grant Thornton have commenced a review of Phase 2 delivery and the IT General Controls within Oracle

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Phase 2 - Hypercare

- Hypercare is the period post go-live where enhanced support is in place for staff and is effectively a 'warranty period' for the technical build by our implementation partner, Infosys. On exiting Hypercare the Council takes over responsibility for the build.

- The programme successfully exited Hypercare, with CMT approval, on 9 July 2025, as the following criteria had been met:

  - Key documentation such as configuration workbooks, design documents and access management documents were in place

  - Handover sessions had been undertaken

  - Urgent changes and issues with the system had been resolved

  - All pre go live defects had been resolved

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Phase 2 – Current position

- As a result, the programme (for this phase) has now moved into business as usual (BAU) with ownership of the system residing within the support model team and the functional teams (finance, recruitment and procurement)
- Activity still continues, such as:
  - Review of support model team and necessary capacity
  - Managing quarterly update cycles
  - Review of Oracle licences
  - Keeping training materials, process documentation and OGL up to date
  - Moving from 'individual based' permissions to 'role based' permissions
  - Internal audit as part of BAU
  - External audit as part of BAU
  - Lessons learned exercise to feed into phase 3
  - Considering how to get the best use out of the system such as through the use of its inbuilt AI
  - Programme governance remains in place such as regular workstream board meetings, programme board meetings, sponsor meetings, internal audit and CMT updates as required

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Phase 3

- Scope of Phase 3 includes:
  - Payroll
  - Employee self-service
  - Manager self-service

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Phase 3 Principles

- Same principles will apply as the most cost-effective approach:
  - Adopt not Adapt where possible.
  - Targeting the earliest achievable date – dates are currently being considered for 2026 but will need to bear in mind the organisational context, including LGR, and school term times
  - Focusing on activity critical to go-live with non-critical activity being deferred until after go-live.
  - Delivery elements - Technical implementation; Organisational readiness; Support model; Governance/internal audit. Building out from complementary Phase 2 activity.
  - Feeding in lessons learned from Phases 1 and 2.

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Phase 3

- Phase 3 is harder than phase 2 from a technical build perspective, needs to be very accurate (to the nearest £1) and has a higher reputational impact if there are issues.

- More challenging, higher stakes, more people affected (i.e. all staff) in a more sensitive area (people's pay)

- Impact on users beyond the HR team is less complex – limited to claiming/approving expenses, claiming/approving overtime and keeping personal information and working hours etc up to date

- Whilst the four core delivery elements of i) technical delivery ii) organisational readiness iii) governance and iv) support model remain, the weighting of programme activity is therefore more on technical delivery

- iii) and iv) are already in place and are to be carried forward from phase 2 and built upon where required

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Key stages for Phase 3

- Complete the build design specification including completion of change controls
- Schools' scope and design specification – to align to ESCC as far as possible
- Data Migration (DM)
- User Acceptance Testing (UAT)
- Data Migration for Parallel Payroll Running (PPR)
- PPR – comparison of SAP vs Oracle payroll calculations (minimum 2 monthly payroll comparison)
- Cut over
- Go live
- Hypercare – 3 months

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- Hypercare – 3 months

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Phase 3 Progress Update

Technical delivery

- Programme delivery principles have been agreed mainly to adopt and not adapt the solution and are being actively used to set an achievable target go live date

- Have just completed Data Migration 10 and due to enter UAT on 10 September

- The timing of the exit of UAT is key to being able to assess a feasible go live date. This is because there are several factors that impact on the length of UAT where there are choices around speed vs quality/risk such as:

  - Number of tests undertaken (i.e. breadth of coverage)

  - Who undertakes the test (greater assurance over quality if programme members do them vs quicker if external resource is brought in)

  - How many tests identify issues which then need to be resolved and re-tested

  - Level of resource available from our implementation partner, Infosys, to be able to resolve the issues quickly and back to testers

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Phase 3 Progress Update

Organisational readiness

- Undertaking Change Impact Assessments and a matrix of which teams/cohorts of staff will need to understand which changes in process

- Building up a persona based approach to 'training' organisational users

- Unlikely to be traditional training but instead focused on specific processes tailored to each persona, and delivered in bitesize learnings e.g. a video showing how to claim expenses

- Comms and engagement plan to follow but will build from phase 2, feeding in lessons learned

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