Fusion HCM in the Cloud

An Implementation Story

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ORACLE Gold Partner
Specialized
Oracle Fusion Human Capital
Management Cloud
Service 2013

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About Us

- Certus Solutions (UK) LLP is an Oracle Gold Partner offering consultancy and implementation services for Oracle HCM Applications.

- Our experience comes from an EBS background, but since late 2011 we have taken a strategic decision to specialise in Oracle Cloud Services, specifically **Fusion HCM** and **Taleo**.

- We have now completed our first Fusion HCM implementation project, having gone live at the beginning of September with a 'global' rollout of Fusion HCM for Lavendon Group plc. Lavendon operates in the UK, Europe and the Middle East.

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Our Journey

- Certus Solutions took a strategic decision in early 2012 to specialise in Fusion HCM. We spent nearly 1 month at Redwood Shores working with Oracle's product development managers and development teams and were given an in-depth introduction to the Fusion HCM product set.

- We used this knowledge to work with Oracle University and began delivery of courses to partners, customers and consultants (including Oracle Consulting Services) around the world. Our training was delivered in Europe, USA and China.

- We worked closely with Oracle Sales to identify prospective customers, and in early 2013 we were chosen by Lavendon Group plc. as the implementation partner for a rollout of Fusion HCM, Taleo Recruitment and Learning across the UK, Europe and the Middle East.

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Why Fusion HCM?

Why Fusion HCM?

The Customer wanted a cloud based solution, covering full functionality for the following processes:

- Core HR processes (hire, promotions, transfers, terminations),
- Talent Management,
- Compensation Management
- Recruitment
- Learning Management

A solution was required that supported a *Global Enterprise*

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Why Fusion HCM?

- Fusion was seen to provide the full suite of functionality with Fusion HCM providing the core HR, Talent Management and Compensation Management processes and Taleo the Learning Management and Recruitment.

- Although currently separate products, Taleo Recruit and Learning will be integrated into Fusion Applications

- Fusion was considered more flexible, and provided a fully globalised solution - Workday and SuccessFactors were perceived as not providing this.

- Fusion was cheaper than the competitors!

The implementation

Implementation Approach

The plan was constructed to allow for a **_phased_** approach.

- To **_minimise the risk_** of substantial change in one hit.

- To go live on core processes **_as quickly as possible_**

- To bring in **_'incremental'_** functionality in later phases

Customer had small internal project team

Certus provided small, flexible team to configure

Implementation Approach

The approach was to **adopt the business processes** to Fusion HCM

- To remove need for customization (only added flexfields / some personalizations)
- **Pragmatic** approach by customer
- If a 'requirement' caused issues with system functionality or was too complex, it was 'parked' until a solution was found so we could progress to the next process
- Traditional approach to UAT
- Controlled Quality with Strict **exit criteria**

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The Implementation Plan

- May 2013: Project Kick off

- May 2013 : Build Enterprise Structures (ESC or Manual)

- May 2013 : Determine Roles

- June 2013: 'Demonstration' Workshops

- July 2013 UAT

- August 2013: Trial Migration

- August 2013 Regression Testing (reapplying setup to ensure it was repeatable)

- Early Sept 2013: Migration + UK Go Live

- September 2013 'Pilot period' before next phases

The Implementation Plan

Subsequent Phases:

- October 2013: Taleo Recruitment

- November 2013: Germany go live

- December 2013: Middle East go live

- February 2014: France/Belgium go live

- April 2014 (to be confirmed) Learning Management, Talent Management and Compensation Management

The Journey

The Journey

- **Working with Centre of Excellence (COE)**
  - Pairing with Partner
  - Customer 'kick-off' meeting
  - Customer Project Manager
  - Advice on tools
  - Help with escalation of SRs
  - Internal Oracle liaison (development/support)

- **Learn about the patching cycles**
  - Patch 'train' – every Thursday
  - Rollup patches (from all customers) – Friday 3rd week of month
  - 'Random' patches at weekends
  - Urgent patches can be applied 'immediately'
  - Testing window small

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The Journey

- Learn about working with Oracle as a 'service provider'
  - What you **_can_** configure
  - What you **_can't_** configure

- Tasks Oracle had to do (Via Service Request)
  - Production to Test (P2T)
  - Change logo or images
  - Make DFF segments available to OTBI (Despite flag!)
  - Control email notifications

What We Learned

- We needed to plan for patching and upgrades as they occurred regularly and required testing.

- Security proved difficult to change, try to stick to standard Roles and Duties where possible.

  ➢ Can change privileges and roles in APM, but take care!

- No Read Only Roles!

What We Learned

- Approvals also proved to be more difficult than anticipated.

- It is hard to change these and in the early releases some approvals tasks must be configured in BPM and others in Fusion Applications.

- Newsflash! In R7, the Fusion HCM Approvals task (user friendly) is removed and all approvals must be managed in BPM.

- We took the approach to keep to the out of the box approvals wherever possible and to disable any unnecessary approvals altogether.

What We Learned?

- Data migration was more complicated than anticipated.

- This was primarily due to the tools available with the product, rather than complexity or volume of the customer's data.

- File Based Loaders were used for loading historic employee data.
  - ➤ Data must be 'clean' or it will not load
  - ➤ Sequence of data load important

- Spreadsheet Loaders were used to update certain values that FBL did not like, for example FTE.

What We Learned?

- Spreadsheet Loaders were used for Workstructures.

- Absence could not be loaded using FBL or Spreadsheet Loader.

- At the time of writing this paper, we are still looking at alternative methods!

- Positions were problematic and it was not possible to find the GUIDs which were needed for the File Based Loader. We had to get help from Oracle.

- We went live on R5, but the R7 Upgrade stopped us from going live with Manager SS as the User Inferace change was significant.

What did We Learn?

- Fusion Applications is still in its infancy. So, you need to be willing to not rollout certain functionality until Oracle provides improvements. An example was absence. We kept MSS and Absence entry back until later phase. Absence is also changing significantly in release 8 onwards when it will be integrated with Time and Labour.

- The Enterprise Configurator is too buggy. It was easier to use it for planning but then configure the Enterprise manually.

- Oracle is still learning what it means to be a service provider

- Key Success Factors: **Keep Vanilla!!**

... and finally

- The UK went live in September 2013 and we are on target to be live in October 2013 with Taleo Recruitment globally.

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