

UWV Upgrades Financial IT System in 3.5 Months with Careful Planning and New Training Tools



Employee Insurance Schemes
Implementing Body (UWV)
Amsterdam, The Netherlands
www.uwv.nl

Industry:

Public Sector

Annual Revenue:

US\$10.9 million

Employees:

18,196

Oracle Products & Services:

PeopleSoft Enterprise Financial
Management
General Ledger
Accounts Payables
Accounts Receivables
Oracle User Productivity Kit

Oracle Partner:



Capgemini
www.capgemini.com

“Thorough preparations, excellent cooperation between all project partners, and the efforts of our own team, we achieved a successful upgrade to our PeopleSoft Enterprise implementation from Oracle. In other words, we completed the project on time without interrupting production.” – Jos Waanders, Head of Financial and Economic Affairs-Data Processing and Provision of Information, Employee Insurance Schemes Implementing Body (UWV)

The Employee Insurance Schemes Implementing Body (Uitvoeringsorgaan Werknemersverzekeringen), also known as UWV, is a multi-billion euro organization that provides temporary income when it is impossible for its citizens to work. The UWV’s Financial and Economic Affairs department is responsible for supervising these finances and the Data Processing and Provision of Information unit registers all financial activities.

The UWV requires a robust and reliable financial infrastructure to efficiently and accurately compile reports, annual accounts, and annual financial statements, according to Jos Waanders, head of Financial and Economic Affairs – Data Processing and Provision of Information for UWV. “We must be able to provide insight into all cash flows for our own operational management, but also for justifying policy decisions. We support all of these processes with Oracle’s PeopleSoft financial management applications,” Waanders said.

In 2006, the UWV began to look at an upgrade to its legacy PeopleSoft system to ensure that it could continue to effectively meet the needs of the constituents it serves and adhere to its financial reporting requirements. Working with Oracle Partner Capgemini and using Oracle User Productivity Kit, UWV completed the upgrade in just three-and-a-half months, well ahead of schedule, because six months were originally planned.

Key Benefits:

- Completed upgrade within 3½ months, well ahead of the six-month deadline
- Ensured rapid employee training for 350 users spread across the 130 locations in the country through use of UPK
- Ensured full product support
- Improved IT security capabilities
- Ensured availability and reliability of financial systems
- Gained increased reporting flexibility

Ensuring Availability and Reliability

“We have been using PeopleSoft applications for years to our complete satisfaction. The system is reliable, robust, and puts us in the position of being able to present the correct information on time,” Waanders said. “We had not, however, formulated a formal upgrade policy.”

UWV’s IT department determined that its legacy financial systems no longer met security requirements, which were becoming more stringent. In addition, UWV could no longer fall back on the supplier’s standard support.

The organization needed to take action to guarantee the continued availability and reliability of its financial systems and data. UWV selected Capgemini to plan and help execute an upgrade of its complete IT infrastructure.

This process involved searching for ways to simplify management practices and offering more flexible training programs. An upgrade to PeopleSoft Enterprise 8.9, with support from the Oracle User Productivity Kit (UPK), offered UWV the best path forward.

“The upgrade also required replacement of IT hardware,” said Steven Primo, Capgemini project leader for the upgrade. “All in all, the upgrade would be a complex operation, partly due to the tight deadline—six months—along with the requirement that users must be able to continue with their work without interruption.”

“The system had to be up and running by the beginning of December 2006 because we had to produce the annual financial reports in January 2007. This meant that the date was really tight,” Waanders said.

Oracle and Capgemini delivered on time and with minimal disruption.

Accelerating the Learning Curve

Together with UWV, Capgemini developed a detailed implementation plan, defining tasks and associated risks. A steering committee, which included representatives from the IT team, Financial and Economic Affairs, Capgemini, and the hardware supplier, met regularly to discuss progress and alleviate any pressure points.

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The group limited the complexity of the migration by minimizing customizations and using the flexible configuration of PeopleSoft Enterprise Financial Management. As a result, minimal work was required to develop new interfaces.

UWV set up the upgraded environment on a separate server, parallel to existing product environments. This strategy cut down the upgrade leadtime dramatically, resulting in 3 months project time instead of the 6 months planned.

In addition, the organizations used Oracle User Productivity Kit to ensure that the systems’ 350 users could master its new features quickly. Oracle User Productivity Kit enabled UWV to quickly create the critical documentation, training, and support materials needed to drive user productivity at the start of and throughout the lifecycle of its applications.

“Compared to traditional training courses, Oracle User Productivity Kit reduces throughput time considerably. This tool, combined with other factors like the coaching approach for on demand class training, enabled system users to get up to speed quickly,” Waanders said. “And the method works, judging from the low number of calls made to the helpdesk.”

UWV’s implementation of the new Peoplesoft Tools resulted in a fast configuration of the interfaces of Financials with other systems.

Why Oracle?

Since 2002, UWV has been using PeopleSoft software to its complete satisfaction. When it came time for an upgrade, UWV selected Oracle again based on its favorable experience. The new Peoplesoft tools and the purchasing functionality were the main drivers to continue investing in Peoplesoft.

Implementation Process

Capgemini began the implementation process by creating an inventory of the complete financial IT infrastructure. Part of the process included investigating possibilities for simpler management practices and more flexible training methods for employees.

Planning had to be very precise, as UWV needed to carry out the complete upgrade within six months. The team created a detailed implementation schedule. In addition, UWV created a steering committee of key stakeholders, which kept a close eye on progress and any pressure points.

UWV's strategic and carefully managed approach, team flexibility, along with utilization of Oracle Productivity Kit enabled the organization to complete the implementation well ahead of the six-month deadline.

"With our upgraded financial management infrastructure, we are now up to date in terms of support and security," Waanders said. "Moreover, by committing ourselves to Oracle and its PeopleSoft applications, we know we can rely on support from professionals who are continually investigating the best ways to guarantee the integrity of financial data and systems."

The Employee Insurance Schemes Implementing Body (UWV) is the organization in The Netherlands that manages the administration of the employee insurance benefits.