ARIES Strategy 2012-2015

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Executive Summary

The ARIES Strategy outlines how we can maximise system functionality and drive efficient, streamlined business processes that support the delivery of our commercial, financial management and aid effectiveness agendas. The strategy was developed in consultation with representative users from different parts of DFID.

ARIES is DFID's enterprise resource planning (ERP) system and comprises two core systems: Agresso supports finance, procurement and project management capability and Alito supports strategic procurement. The system can be made to work better for DFID. At present the potential of ARIES is limited and we are unable to realise all the expected benefits the ARIES Solution should deliver. This strategy provides a way to develop the capability of ARIES to support an increased aid programme.

The business requirements of the Finance & Corporate Performance Division are now only partially met by ARIES. The strategy will align our information systems with changing working practices in Procurement, Financial Management and Aid Management.

We want to make the user experience easier, ensuring that information is more clearly available, that users know what they need to do to complete a task and improving links with other core systems. This will help to improve the quality of information within ARIES, and to reduce user frustration and non-compliance.

Aid project management is unique to DFID and a small number of similar donor organisations, and is not a core feature of ERP tools. We will decouple DFID-specific business processes such as project cycle management from ARIES while maintaining financial and procurement information in the core system. We will focus on usability needs for programme staff, and seek to make the project system integral to the way people work.

In other parts of the system we want to revert to core system functionality where possible, taking maximum advantage of the core product. This will make it easier for us to take product enhancements as they become available. In parallel to this, the operating model will be adapted so that finance professionals are targeted at finance work.

We will deliver improved management information and reporting initially through job scheduled reports and subsequently through a range of management information tools.

We need to prepare and be ready to take advantage of the opportunities of shared services or cloud computing when the time is right. The move towards a system using more standard approaches will support this.

Introduction

Purpose

This document describes the strategy for the next three years to improve the ARIES systems and to better align with business need. The strategy outlines current weaknesses and our ambition for what we want to achieve during the period covered by this strategy. We want to maximise system functionality and drive efficient, streamlined business processes that support our commercial, financial management and aid effectiveness agendas. The strategy identifies key initiatives to deliver and manage the change, and specific solutions will emerge as detailed plans are developed.

Background and Context

DFID's Finance Improvement Plan ("Finance for All") committed us to develop by June 2012, an ARIES Strategy, spanning 2012-2015. This is needed to ensure that ARIES continues to support an evolving business with robust and efficient processes.

ARIES is DFID's project, finance and procurement management system and covers the following business functions:

Project management	Admin and Programme projects
Financial management	Accounts Payable
	Accounts Receivable
	Budgeting and Forecasting*
	Transactions (General Ledger)
	Reporting
Procurement	Manage purchasing (P2P) process
	Strategic procurement (Alito module), including manage contracts and tendering
	Supplier management and portal (Alito)
Management Information	Reporting on Finance, Projects and Procurement

*A bespoke application was developed in-house to provide a simpler user interface for forecasting.

The ARIES system is a combination of Agresso Business World (ABW), a UNIT4[1] product, and the Alito strategic procurement application, a Proactis[2] product. A number of customisations were made to fit DFID's business process, particularly for aid project management.

ARIES was launched in December 2007 and was rolled out to all parts of DFID by July 2009, replacing a number of legacy, standalone and decentralised systems. The latest major upgrade in DFID was in January 2011 and an external-facing Alito Portal was launched in April 2011. The Portal is an external facing engagement tool which allows suppliers and fund recipients to register for access to the system, engage in procurement activities and monitor payments.

The key successes of the ARIES implementation were:

- Creating a single unified system recording all DFID activities and unified business processes operating across the organisation.

- The system supported a move to full resource accounting, improving our ability to meet key government targets (5-day payments, accounts preparation, transparency).

However, there are some weaknesses in the system and accompanying processes that mean that the system has come under sustained criticism from staff. These weaknesses particularly apply to the project cycle management module, but also concern the procurement and finance modules. These are discussed in the *Where are we now* section of this document.

Strategy coverage

The ARIES Strategy outlines the ways in which ARIES can be improved over the next 3 years, whilst delivering efficiencies. The Strategy covers the following key elements:
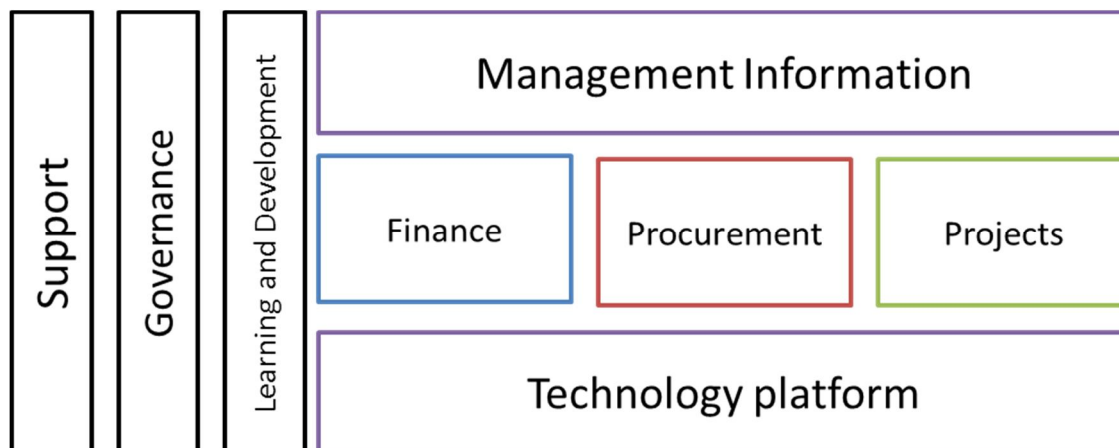
The core functionality of the system includes the key finance, procurement and project areas, along with management information (reporting). The technology platform represents the software and

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[1] http://www.unit4.com

[2] http://www.proactis.com

infrastructure used to deliver the system. Other areas relate to how the system is managed and users supported.

Related initiatives

The strategy is one of a range of initiatives seeking to improve DFID's processes, information and systems in similar timescales, with some overlap between the initiatives.

- Finance Improvement Programme ("Finance for All"), setting out how financial management is to become more embedded in the organisation.

- Commercial Strategy, setting out how we achieve better value for money.

- Development of e-procurement strategy covering e-tendering, coding / Business Intelligence, P2P, streamlined procurement processes and increased governance. Projects will be linked to the ARIES development strategy and will be enablers for delivery of the PrG Commercial strategy.

- Open Data Strategy and Data Quality Improvement Plan, concerning the publication of high quality information as part of the Government's transparency agenda.

- Government ICT Strategy and DFID IT Strategy, outlining changes to our IT systems and environment.

- Management Information project, investigating improved ways of accessing management information across the organisation.

- Learning and Development Strategy, outlining approaches to learning and development, including the use of e-learning for systems training.

Where we are now

This section provides a brief overview of our user community and the issues that users are concerned with. While the system is functional and supports the operation of DFID's £8bn business, there are significant opportunities for improvement that the strategy seeks to address.

There is a continued need to ensure that the ARIES system is relevant to DFID's evolving business. A number of business circumstances now exist that were not reflected in the original requirements captured in 2005. For example there is a stronger emphasis on financial disciplines (monthly accruals, forecasting), more internal and external reporting requirements (including greatly increased transparency) and an increasing emphasis on results monitoring. Increased spending has a significant impact on the volume of procurement activity.

Finance

The financial management system in ARIES supports **day to day operations**; accounts payable, transaction processing, general ledger management and treasury and banking operations are carried out routinely and effectively, albeit with a high degree of manual intervention. The system supports the delivery of a Departmental budget of around **£8bn** and enables the production of internal management information and external information such as statutory financial accounts, within the required time period. The system integrates with local banking services in several overseas countries.

As ARIES is a centralised single system, financial information is available in real time from and to all parts of the organisation. The launch of ARIES introduced the operation of Purchase Orders and Three Way Matching in support of improved financial management, and this has led to a more disciplined approach to purchasing that supports Government targets such as payment of invoices within five days.

Procurement

ARIES replaced numerous disparate systems that made accurate data collection difficult and simplified and improved the Procure to Pay (P2P) process from the previous system. This resulted in improved procurement practices, supporting professionalisation, increasing efficiencies and auditability across the business. ARIES currently supports strategic procurement, supplier management, contracting and eProcurement, as well as P2P. Suppliers are able to manage their own information and participate in tendering exercises through the Alito Portal.

Since ARIES was launched a number of factors have changed business priorities. Greater efficiencies, streamlining work practices, faster mobilisation and transparency about end recipients means that procurement capability needs to develop further in order to deliver on these goals.

A number of issues regarding the current configuration, functionality of the Agresso and Alito platforms and information integration have limited the benefits of ARIES. This has resulted in an

increased use of offline record management to supplement or duplicate existing functionality of ARIES.

Project Cycle Management

The Project Cycle Management (PCM) module in ARIES supports the initiation, approval, execution and closure of aid projects across DFID's entire portfolio. The system supports a wide range of funding types including front line delivery, bilateral donors, multilateral donors, humanitarian assistance, non-profit organisations, budget support, financial aid and development bank replenishment.

ARIES also provides a single central repository of project information, enabling real-time analysis of any project or programme across the organisation. This is uncommon among large bilateral donors.

Feedback from end users of the PCM module indicates a high degree of user dissatisfaction with the system. The system is perceived to be **complex and non-intuitive**, with a poor user interface. Tasks are not presented in a logical order so users do not know the next step in the process.

"While ARIES is a competent financial management system, it does the bare minimum on project management, and in essence only captures key approvals and information from an offline/paper based set of procedures."

ARIES Workshop Participant

Integration with our document management systems also needs improvement. Reporting on project information from core ARIES is also inadequate.

Workflows are complex and poorly understood, leading to an increased use of offline processes within country offices and project teams. This has led to ARIES being viewed as a decision recording (administrative) tool rather than an aid to effective project management, and this is reinforced by the lack of effective management information from ARIES.

It can be extremely challenging for new staff to get all the information they need to manage projects, each with their own set of management issues.

Reporting and management information

ARIES provides a centralised repository of project, procurement and financial information from a single source of **real-time information** for the whole of DFID. The data structure of Agresso uses dynamic relationships between data elements and therefore supports flexible reporting that can adapt as the organisation changes, for example the recent introduction of structures to support pillar reporting.

The system also supports a range of **external reporting requirements**, including:

- Central Government accounting (through COINS and OSCAR).

- OECD DAC reporting on aid activities.

- Transparency reporting, of both Spend and Aid activities.

These reporting activities are not fully automated and rely on some manual work to fully prepare the information for publication.

However, ARIES reporting is clearly not delivering the information required by different groups across DFID. Management Information (MI) requirements vary across the organisation and there is no clear single set of reports that meets the requirements of all users. Some core reporting functionality within Agresso is not enabled.

Some key reporting requirements are not met in ARIES, particularly for climate and environment assessments, and for private sector involvement. Reports do not provide programme managers with the information they require to track changes in budgets and forecasts.

User experience and training

ARIES comes under sustained criticism from users in terms of ease of use. There is a perception that the system is not fit-for-purpose for a number of reasons:

- **Users do not find the screens intuitive.** Typically, labels and tabs are not self-explanatory, which is not only frustrating, but has a negative impact on productivity. Similarly, when generating reports, there is very limited understanding of the data available to report on.

- **There is no consistent language for data and reporting across DFID**, this leads to misunderstandings and misinterpretations. Clearer descriptors and more readily available data reporting guidance will help to bring a common view and understanding of the systems parameters and content.

- **System roles do not necessarily match organisational roles** and this makes the maintenance of users more complex and time consuming for the ARIES Support team.

Queries to the ARIES support team show that many users do not understand the full functionality of ARIES and feedback from workshops show that users do not find the system straightforward. This could be alleviated by improvements to the training available for users both before they are granted system access and if they are faced with issues during work.

There is a constant turnover of staff in key roles across the organisation, diluting ARIES knowledge in key posts. Infrequent users of the system find it difficult to maintain knowledge.

New staff members are required to use an e-learning product for training across all modules and pass the test before access is granted. Existing staff may wish to gain additional knowledge on using ARIES by undertaking specific modules.

Initial feedback on the e-learning product is not positive. Training is not role-specific meaning that all staff must complete all modules and the test is difficult to pass at a score of 90%. It is also difficult for the user to get direct feedback on areas they need to revisit before re-sitting the test.

Due to DFID's customisation of the standard Agresso/Alito products, we are unable to take advantage of **core training material** which is readily available from the supplier.

Technology platform

ARIES is a combination of two integrated systems: Agresso Business World provides the key finance, P2P and projects backbone; and Alito provides the strategic procurement and supplier portal modules. The systems share the same technical infrastructure and database.

The systems installed in DFID are not the latest product releases from the vendors. The main reason that the versions are not up to date is the amount of effort required to upgrade the system. In particular, the DFID Agresso customisation is heavily embedded and has caused significant issues during previous upgrades.

The Alito system has received frequent updates; the Alito system does not have the level of complexity or customisation that Agresso has so updates are generally easier and have less operational impact.
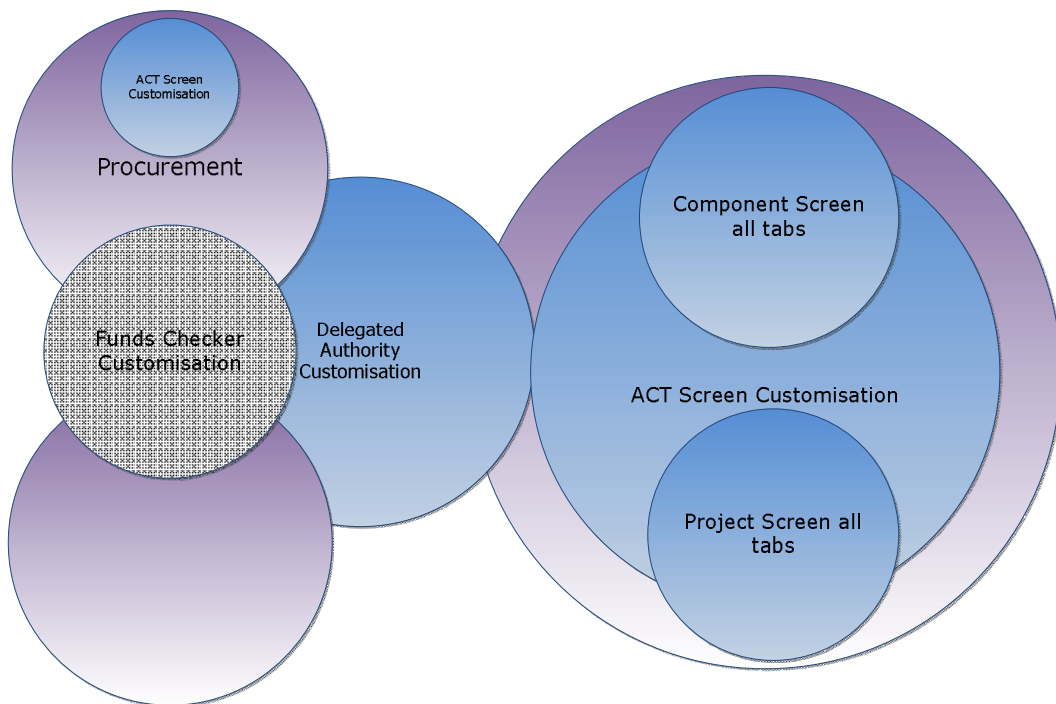
Configuration and Customisation

Configuration uses the inherent flexibility of Agresso to add fields, change field names, modify drop-down lists, or change workflows. If something is configurable, it means the existing software can be worked (via the standard admin user interface) to reflect the change.

Customisation involves code changes in the base application to create functionality that is not currently available in the off the shelf product. This means that software code has to be changed (added or moved around) so the software can do what you want it to.

Customisation can be very costly and complicate future upgrades to software because the code changes may not work in to the new version, requiring some rework.

The following infographic illustrates the areas customised in our current Agresso system.

DFID's IT Strategy 2011-2015 discourages customisation, although it recognises that it may be necessary in some circumstances:

"When using off-the-shelf software, DFID will configure and extend, but not customise core components."

Drivers of change

The main factors driving change of the system are outlined below, and affect all aspects of the ARIES Strategy.

Financial effectiveness

Improved financial management

Our Finance Improvement Plan 'Finance for All' sets out our strategy for improving Financial Management and accountability across DFID. There is a growing emphasis within DFID on financial discipline throughout the organisation. The introduction of phased budgets, monthly accruals and rigorous forecasting means changes to the processes supported by ARIES, as well as to use of the system by a range of managers and finance specialists.

Key to delivering the Finance Improvement Plan is the requirement to have a system which provides:

- Efficient transactional processes and a platform to deliver a more effective way of supporting financial management in the wider business (a new Finance Operating Model)

- A full transparent understanding of our costs

- Confidence in our forecasts so that we can make the best use of our resources

- Accurate management information to inform our decisions

- Systems and tools that enable us to understand patterns of spend and financial performance

Value for Money in funding and procurement

DFID are working hard to ensure value for money at every step: producing rigorous business cases, working to develop ways of measuring results and value for money, designing fraud-proofing into our programmes and processes, designing impact evaluations, asking partners some challenging value for money questions or bringing a sharper commercial focus to our work. With the drive to make cost savings and efficiencies across Government, more emphasis is being placed on cost benchmarking, and there is a strong drive towards a more cost-effective procurement function.

Good Governance

Continued focus on anti-fraud and anti-corruption means better management information is required, as well as strong system controls.

External compliance

Our external environment provides a strong influence for our operation. External influences include HMG compliance requirements, international accounting standards and HMT projects such as Clear Line of Sight, OSCAR (COINS, and changes in the Financial Reporting Manual (FREM).

To boost the economy, the Government target for completing end to end procurement process is 24 weeks. Although this is most fitting to procurement of goods rather than delivery of aid, management are aiming to adopt the principles of LEAN procurement and aim to achieve at least 50% of this aspiration. This will likely increase year on year.

Ensuring efficient processes in corporate services against a rising aid budget

Along with other government departments, DFID is required to reduce the costs of administering the organisation by 33% over the period 2011-2014. Over the same period, the aid budget is planned to grow by approximately 25%. This means that DFID needs to maximise operational efficiency through driving efficient system processes and eliminating manual intervention where possible.

In addition as the aid budget rises, the trend is towards higher project values. We need to ensure that we have accurate information on current and future pipeline projects to inform procurement capacity and contingency planning to manage expenditure slippage.

Co-location overseas ("joint platform")

Around 30 of the DFID country offices are co-located in the same premises with other parts of HMG, primarily with the FCO. This has led to an increasing demand to work together and share services with the focus on functions that can be shared such as local IT, transport, security and procurement. We do not currently share an IT platform with any of our Whitehall partners which means that core business functions such as HR and finance are not yet supported by common systems.

Results

Capturing results of aid interventions is a key part of the Government's strategy for aid delivery, and there is an increased focus on results as well as inputs. There is a drive for more effective and directed aid, and an increasing complexity of arrangements (for example Payment by Results).

Improved evidence-based decision making

Access to information on DFID projects is important to provide an evidence base for future interventions.

Transparency

Transparency touches everything we do in DFID. From the projects we fund, to the money we spend, to the salaries and expenses we pay our people. This increased transparency will provide greater visibility of our work, make us more accountable, and make our information easier to locate. The Government has committed to full transparency on DFID aid projects, and project data is published to the DFID website and in an international open data format on a monthly basis. Statistical information is also published to the OECD DAC (Development Assistance Committee).

Improvements to the quality and coverage of information published are outlined in the Open Data Strategy and will impact on the information captured in ARIES. Systems will be required that support recording of additional information on aid projects, for example the detailed location of aid

activities delivered as part of a particular project. As external scrutiny of DFID's spend increases, we need to be accountable for all spend including that of suppliers delivering on our behalf.

System

Software components

The Agresso products that form the core of the ARIES system are continually evolving. DFID needs to leverage new features and improvements to the products, while minimising the cost of doing upgrades. Parts of the system rely on customisation making upgrades more challenging.

Integration with document management system is limited and document-centric processes (such as business case approval) are not carried out in ARIES.

Shared Services and Cloud Computing

The government ICT landscape is changing, and new capabilities are becoming available as Cloud-based services, shared services or new contractual models, as outlined in the Government ICT Strategy.

The Government Shared Services Strategy is due to be published in summer 2012 and envisages consolidation of all finance, procurement and HR systems into one of five government shared service centres.

Where we want to be

This chapter outlines the vision for each major area of the system, along with a set of specific commitments over the next three years. As noted before, this is not a project plan and details of the specific solutions will be developed by individual project teams.

Overall vision

We want a system that supports strategic and operational decision making, aligning the information we hold on procurement, finance, projects and results and making it easy to get access to this information.

We want a system that is easy to use and intuitive, requiring minimal training.

We want a system that relies on core functionality with limited or no customisation. This will remove the need for administrative tasks and allow us to keep the system up-to-date with current functionality provided by the vendors.

Finance

We want a financial management system that delivers efficient, automated, streamlined and simplified transactional processes with key system based controls embedded. This includes the capability to hold **strategic, scenario based forecasts**. We want spenders to understand and own the information they receive from the system and take the necessary action where information is off track.

In the short to medium term we will deliver **browser reports** that link hierarchically to the financial information contained in strategic Board reports, recognising that incorporating non finance information on results is a longer term objective. The reports should be clearer and more user friendly, showing additional information such as a RAG rating or multi-year comparatives.

We want to make improvements to the **Purchase to Pay (P2P) process**, connecting procurement and invoicing operations through an intertwined business flow that automates and streamlines the process from identification of a need, planning and budgeting, through to procurement and payment. To ensure the organisation is meeting its mandated payment deadlines, we want functionality to remind spenders to receipt goods, to manage invoice payments, and to escalate as appropriate. We will develop and implement improved **receipting and PO housekeeping practices** to allow for automated accruals.

We want to harness the opportunities and benefits of **e-invoicing** including PO flipping and direct order to invoice generation, to allow us to process invoices much more efficiently. We will therefore investigate enhancements to the system to allow e-invoicing and to improve the scanning process.

We want to **improve system controls** (including funds checker) and workarounds by applying system upgrades.

To support the new Finance Operating Model, we will streamline and simplify **ARIES Role Profiles**. In support of a more personalised view of information in ARIES, we will produce customised views and tasks by role.

We will develop a new **Chart of Accounts** delivering strategic management information needs, aligned to central government reporting.

Finally, we will develop a **unit costing** solution.

Procurement

We want to improve the functionality of our systems to support the current and future priorities of procurement within DFID. We want to build capacity and flexibility, supporting the scale-up of procurement activities as we move to a 0.7% ODA/GNI ratio.

We want to integrate with central government initiatives such as Government Procurement Service coding, and to take advantage of new approaches to P2P, as outlined in the finance section above.

To improve the **management of suppliers**, we will cleanse the supplier records in the system, linking parent and child suppliers and flagging historic suppliers. This will provide the ability to track spend to an entire organisation within the system and will reduce the effort required in manually manipulating and interpreting records to roll up data for one supplier. Recording further sources of information on organisations (Dunn & Bradstreet, Companies House, charity registration, Open Corporates) will provide richer information on the organisations we work with.

We will improve our **capacity planning capability** by exploring different work plan routes, automating workflow and providing visibility of pipeline work together with access to timely and effective reports. This will lead to improved oversight of personal tasks and actions, senior management confidence in balancing workload since information is available in a consolidated live environment.

We will support the reporting of procurement information from an overarching management information (**business intelligence**) tool. This will improve substantially the intelligence that will be able to be derived from analytics. Some of these reports could be part of a **job scheduled report** set, for example covering live contracts, spend against contracts, current work allocation.

We will create a configurable set of **workflows for executing tenders**, particularly those below £100k. These workflows will guide the user through the tasks required to complete their exercise and enable DPOs across DFID to conduct their sub £100k tender exercises.

We will develop the ability to "tag" transactions in ARIES (for example with aid type codes, contract number, framework) in order to deliver better spend analytics and support oversight of spend from **frameworks and contracts**. This would enable analysis of the effectiveness of the framework or contract, reducing or removing the requirement for offline reporting and manipulation of data.

We will explore options for **day-to-day administration** of procurement information.

Project Cycle Management

We want to have a more flexible, dynamic project management system to improve consistency of management and oversight, especially for new staff in project teams. This should provide a single place for all project information, supporting reporting (narrative and financial reports), key decisions which affect the delivery or scope of a project, proactive management of anti-corruption, including details of risks and mitigation actions and a key audit trail when fraud allegations are received.

Workflow could be linked to documents, so a Business Case document could be approved or rejected online, and a record of all workflow and comments kept at each stage.

This is a long term aspiration which could not be achieved through Agresso alone, but would involve the development of a bespoke module designed to support DFID's aid management processes. The module would support the full project lifecycle while using the core finance and procurement functions in ARIES and the document management capability of Quest. We wish to deploy this **aid management platform** within the strategy period.

In the medium term, we want to deliver a **more personalised user experience** ("My ARIES"). This approach would hide some of the complexity of existing Agresso screens and tackle known usability issues including the integration with Quest. We will also look at improving the visibility of supporting documentation within the context of a project.

Project Officer View	QA/Team Leader View
List of projects, start and end dates, commitments and stage (prepipeline/planner)	List of portfolio projects, start and end dates, commitments and stage (prepipeline/planner)
List of components and related requisitions/ purchase orders (product and account codes)	Drill-through to Project Officer View
List of Annual Reviews/PCR/ Audit statements due in the coming 3 months.	List of Annual Reviews/PCR/ Audit statements due in the coming 3 months.
Key dates/events in project life e.g. 6 week drafting time for new Business case, 1 month AR lead up time etc.	
Link to documents for the project	

Further functionality will be considered to enable users to input or update data into ARIES, as a stepping stone to the full aid project management module.

We will investigate the possibility of adding additional **notes areas** or workflow fields to projects where key actions/ decisions/ tasks can be recorded online. This would make handover to new project staff much easier as the data would be available in once place rather than in numerous emails on Quest.

We will review how **results** are captured at project level and aggregated to country/department level. Following pilots in 2012, we will investigate how to record more detailed **location information** (geocoding) as part of a project record. This information may not be stored in the core Agresso system but may provide a path to the aid management module.

Management Information

We want ARIES to be user friendly and flexible enough to support exploring **different scenarios** where required. We want a **single source of real time data** that can be relied upon due to the robust controls inherent within ARIES. We also want a system that is aesthetically pleasing and able to generate reports with RAG ratings and KPI dashboards to direct attention. We would also welcome the ability to compare data across departments or across periods.

We want to define consistent strategic MI requirements and then develop these reports within ARIES. The development of the new Chart of Accounts will support this.

Part of a process and culture change that will be required to optimise the capability of ARIES will be in defining a suite of **routine standard reports**. This process has already commenced with the development of **job scheduled reports** that will be delivered regularly to users and available real-time on ARIES. This will help to reduce the need for offline reporting, and will provide a consistent view across the organisation. We hope that this consistent view will also drive up data quality and improve the reliability of information in ARIES.

We will deliver new ways of accessing ARIES information using the core Agresso tools and the SQL Server data mart. We will investigate the use of in-house, cloud hosted and shared service Business Intelligence (BI) and spend analytic tools to enable us to better analyse our data.

User experience and training

We want to make the user experience easier, ensuring that users know what they need to do for a task, activity or project stage, for example making the link between projects and documents much clearer. This will help to improve the quality of information within ARIES, and to reduce user frustration and non-compliance.

User feedback from workshops highlights that a key requirement is to have system access that is tailored to the roles they hold. Users want clear concise reports which help them manage strategic objectives, key targets and operational budgets with routine reports available online and through job scheduled reports delivered to spenders' inboxes to help increase accountability.

As part of implementing the strategy, we also want users to be involved in the development of solutions and improvements. To help with this we will set up an **online discussion forum** (similar to that used for the Technology Upgrade, Whitehall move and HR Passport changes) to encourage feedback and discussion on particular issues and solutions.

We want to have access to **effective, easily available, role specific training material and user guidance** that reflects the system that people are using at the time. If we move to a more standard version of Agresso, it should be possible to move towards a standard training product produced by Unit 4.

In order to achieve this, we will:

- Develop **role profile-specific training and testing**.

- Identify a **business champion** in each division to support training and improved use of the system.

- **Improve the tests** to provide test feedback on areas of strengths and weaknesses, to support users through their learning.

- Investigate improved methods of **delivering training**, either through a standard Unit4 product, or through other means, such as a crowd sourced wiki platform.

Technology platform

We want to ensure that our systems are as up-to-date as possible, we will need to restore specific areas of the application back to the core product and reduce or eliminate areas of customisation.

Updating to ABW 5.6 (Route 66) would enable all overseas office functions to be carried out in the web client (ARIES Self Service) and to remove Smart Client from those users, simplifying the user experience and improving performance and eliminating some licence costs for the Citrix technology. Better operation of funds checker, forecasting and the substitute screen in Route 66 would allow us to decommission our customised versions. In doing this it will make supporting and future upgrades of the system easier.

We need to develop a realistic **release strategy** for Agresso, learning from other customers of the product. Infrequent upgrades increases the risk of defects, system incidents and in many cases poor performance. However we need to recognise that upgrades do require effort, particularly in testing, and need to be properly resourced. To support a more streamlined upgrade process we will investigate the use of automated testing tools that will identify screen changes and assist in initial testing. We also need to develop a release strategy for the underlying database technology (SQL Server) and server operating system (Windows Server).

We want to make more use of the existing SQL Server data mart reporting capability, potentially expanding this by building analysis cubes. This will provide users with additional reporting features and standard reports, and will support analysis of trends over time. We will investigate other business analytic tools that would support better management information and reporting.

We want users to have personalised views of their data. The use of Route 66 coupled with some bespoke screens would produce dynamic views for users allowing them to see important information for action and provide better visibility of their requisitions, purchase orders and projects.

Scanning is a current bottleneck in the system, and we will investigate the potential use of **e-invoicing** to complement a revised **scanning solution** to increase the productivity of the scanning desks and improve image quality.

We will improve the capability to plan and execute strategic procurement and supplier management.

Government is strongly encouraging the takeup of **Shared Services** and Cloud computing solutions. Many of the technology and platform changes listed above will ensure that we move closer to a core version of the product during this strategy period. That will make it more straightforward to move into a shared hosting environment.

Defects

Some of the most prominent recurring issues which users experience on a daily basis are categorised as 'defects', which are managed by the ARIES Support Team. Tackling these under the umbrella of this Strategy will have both a high impact on users and provide evidence of positive changes in response to demand. As such, resolution of priority defects will be built into work plans. We will establish 'priority' defects, and ensure value/benefit can be attributed to resolving each, and we will work closely with stakeholders to gain consensus.

Delivering the strategy

This chapter presents aspects of the delivery of this ARIES strategy, enabling smooth running and operation, management of change and support to users.

Approach

We need to take a pragmatic, staged approach that enables the best value for money to be obtained from new investments in ARIES capability.

The strategy is not envisaged to be a single programme, but rather as a series of connected and possibly interdependent activities. This approach will:

- Use lean project management/agile delivery methods, so that both user needs and business value are the main focus;

- Run smaller, more frequent deliverables, contributing to the overall strategy;

- Use the off-the-shelf products and processes rather than customising to DFID's wants. Our preference is to adapt DFID processes rather than customise core system functionality.