Shared Services and Procession
A Discussion Paper

Background

Sharing a service provides the opportunity to reduce waste and inefficiency by reorganising or reusing assets and sharing investments with others. Processes, facilities, maintenance contracts and management effort to name but a few are likely to be duplicated across different departments. These could be organised more effectively - either local or nationally - and could free resources that could be re–invested in citizen–focused activities and the improvement of services.

Although the logic for the application of shared services to the public sector is strong, governance and cultural issues are significant barriers. The successful adoption of shared services requires transformational projects and programmes with a heavy emphasis on enabling cultural and behavioral change. Sharing will ultimately allow the public sector, through standardization and simplification, to make significant improvements in effectiveness as well as delivering savings across public sector services.

Where to begin

The first stage in the long journey to shared services is the identification of the business functions which have processes common to several organisations across the public sector. The fundamentally political nature of the Public Sector can act as a barrier to the establishment of shared services arrangements.

The key issues tend to be concerns about perceived loss of democratic control, for example over delivery standards in relation to customer service for which departments feel locally accountable, or more general concerns over the 'local' identity of a service being eroded through provision of that service by an 'arms length' organisation. High levels of trust, and very careful implementation planning, is also required to ensure that the benefits and risks of developing a shared service arrangement are shared between partners in a transparent way.

Once agreement has been reached between the partners, detailed examination of existing business processes and their data requirements within each partner is the next stage. It is vital to establish commonality and diversity across as many of the departments who intend to use the shared service as possible.

The Procession Approach

Once identification of the requirements of each partner has been established a matrix of the 'shared service rules' for each partner is established. This matrix is built in Procession, using a configuration type tool, and the matrix is used to govern, for each partner, how their process based shared service works. It is not necessary for this matrix to be exhaustive as the shared service administrator can amend this matrix at any time. However, for cost

reasons, it is important for the matrix to encompass at least 80% of the total requirement at the outset.

This matrix can also incorporate the individual 'business rules' for each partner. For example it is not necessary for each partner to charge its customers the same price for a service provided.

The shared service is then built in Procession using the Graphical Process Designer. A number of processes will be built. Where elements (tasks) of the shared service are common, these are combined into a single process. Elements that are individual to a partner are built in separate processes. The matrix of shared service rules and the conditions on links between each element of each process then governs the way the shared service works. The users within each partner are presented, at run time, with the shared service application running according to each partner's specification.

This individuality, for each partner, can be extended to the style of the forms that each partner uses and the individual data elements within each form that the partner's users are presented with at run time.

Reports from the shared service can also be partner specific.

When any new legislation emerges requiring change this can be rapidly implemented in the software from the centre so ensuring all comply at the same time

How does Procession achieve this?
This is achieved by linking groups, roles, users, literals on forms and business rules.

Each partner in a shared service can be referenced as a 'Group'. By linking roles, users and groups a unique matrix can be built in Procession, which will control how the shared service works for each partner.

It is part of the underlying structure of Procession that all users of a Procession system will have a role. A role defines the type of function that each person in an organisation performs.

As part of managing users, you need to be able to control user access to processes and tasks. Procession enables you to do this with user roles. Each process created and task defined in Procession specifies the user role that can run the process or perform the task.

When you create user records, you assign a group and one or more user roles to each user. A process only appears in the process tray of the users to whom the specified user role has been assigned. Tasks only appear in the task trays of those users to whom the role specified for the task has been assigned.

Each role can have many users and each user can have many roles.

As part of this matrix forms can be defined for each partner by reference to that partner's group and the literal identifier for each field on each form. This

can be further refined, if required, by linking the user to each field on each form.

Defining the 'business rules' for each partner by reference to that partner's group and the rule identifier extends the matrix further. This can be further refined, if required, by linking the user to each business rule. In this way, for example, different users could be allowed to claim different mileage rates in an expenses process.

Conclusion
Shared services are a logical and an economic way for government to minimise cost of software, ensure a degree of consistency and improve efficiencies across the board. Procession's unique data-centric architecture as a Process Application Platform opens up new innovative ways to implement yet recognising those differences will always exist. Any modern software deployments also need to recognise the service requirements will constantly change and this software agility is a proven capability with Procession.

This requires a collaborative approach lead by a supplier with proven expertise to co-ordinate all the required facilities to see a deployment. Procession's innovative approach to software is an enabling technology and requires such expertise and domain knowledge.