

# Royal navy

Business



Company: Logsys Solutions Customer: Royal Navy Submitted by: Media Link

When the Royal Navy needed to replace a manual, paper-based Officer Appraisal System for its 7, 500 officers, it chose Business Process Automation (BPA) specialist, Logsys Solutions Limited of Wokingham, to design and develop a new, automated system in a contract valued at around £85, 000. The need for automation developed as the number of officers to be considered for promotion by the RN's Promotion Section each year increased from 25 per cent to 65 per cent, placing a huge additional burden on an already overstretched administration. A further requirement was to handle transfers which involves processing requests from transferees as well as automating confirmation/rejection letters. In this context, the Promotion Section decided to automate the process of capturing and collating information from Officer Appraisal forms to assist in the sifting process undertaken by Selection Boards, although the assessments by these Boards would continue to be conducted using the paper Appraisal Form.

With the RN's units spread worldwide, the OAS had to be rolled-out globally, without any significant support overhead. This was to be handled by a desktop application that would enable the completion of the Appraisal Form, sending it back to the Promotion Section at Portsmouth. The information would be uploaded into a central database and reporting application. Following review by senior officers, a signed "hardcopy" of the form would then be returned and archived to validate the appraisal, flagged as "provisional" until this is received. Logsys had been recommended to the RN as an Informix Corporate Partner, although Logsys were not then a Ministry of Defence approved supplier.

However, Commander Dudley Pound, Head of the RN's Promotion Section, 01705 727429, had sufficient confidence in the company to make the necessary business case to allow a non-approved supplier to tender. The company subsequently won the contract. “ We selected Logsys because they offered all the skills we required to successfully develop the system we wanted,” Commander Pound explained. The initial part of the project was a requirements capture and definition, leading to production of a functional specification, working closely with the team from the Promotion Section, to understand the manual, paper based system and design a solution. At the same time, the Logsys team had to understand how the RN works at both a command and operational level, something they achieved “ extremely well” says Pound.

The process encompassed:

- Assisting in the redesign of the S206 appraisal form to ensure that appropriate IT requirements are addressed and met
- Delivering and supporting a new IT based S206 to replace ‘ report writer’ software made redundant upon the introduction of the new style S206
- Delivering and supporting a suitable database capable of accepting direct input from S206 report, replacing current procedures for the administration of Officers’ Promotion and Transfer reports and dealing with a significant increase in workload and functionality.

During the development of the system, Commander Pound explained that: “ Sometimes Logsys’ ideas were just too good. The existing IT infrastructure in

parts of the RN is still very basic, with low specification PC's that just cannot cope with some of today's latest technology. Therefore, the design and development of the OAS had to cater for the 'lowest common denominator' in terms of deployment capability," he continued." That aside, the OAS was delivered on-time, it was a robust product and it did exactly what the RN wanted," Commander Pound stated.

## **Benefits**

The Logsys OAS has provided the Promotion Section with automated management of Officer Appraisal, Promotion and Transfer, easy storage and manipulation of the information required to undertake this process and a reduction in the administrative burden. Commander Pound explained that this is a major asset, given the increase in numbers to be considered for promotion. He went on to describe the key benefits that have accrued from the OAS, as follows:

### **Consistency of Appraisal information received**

At one time, there were approximately 15 versions of the appraisal form in use, resulting from the "localised" forms that were developed by different units around the RN. The OAS ensures that one standard form is used throughout the RN, which is key to the fairness of the process.

### **Reporting time almost eliminated**

Under the original system, a significant number of man-hours was expended to manually generate the required reports for a Promotion Board. e.

g. Officer Profiling information from the Appraisal Forms had to be transferred manually to the Profiling Report for over 1000 officers. It now

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takes just minutes for the OAS to generate the report from the central database.

## **Improved Quality and Reduced Cost of Documentation for Redboxes**

Known as the “ Redbox” system, the files for every officer “ in-zone” for promotion are placed in a (literally) red box for review by Promotion Boards. Generating the Appraisal reports required for Redboxes can now be done through printing the required information direct from the database using a standard report.

This delivers an “ original” quality form every time, and eliminates the requirement for photocopying the archived manual forms, which is costly and time-consuming.

## **Greater adherence to the process**

The OAS ensures that the correct process is more tightly followed than under the manual system. This is especially critical in terms of the deadlines for receiving completed appraisal forms. If these forms are late, the officer concerned might have to wait another year before being considered for promotion.

## **More effective use of resources**

As the administrative burden has been reduced, the staff of the Promotion Section have been able to spend time focusing on other important areas and requirements for the long-term benefit of the RN.

## **Easier management of physical storage requirements**

The ability to print information on demand for Redboxes and other reports will considerably reduce the demand for physical storage.

Once the signed hardcopy has been received and archived, the appraisal is validated on the Central database, and the electronic copy in the central database will become the primary source of reference for an Officer's information.

## **Background to the Appraisal, Promotion and Transfer Process in the Royal Navy**

The efficient process of assessing, selecting, promoting and transferring RN officers has always been fundamental to developing the right individuals to command and lead RN units. Historically, 25% of the RN's 7,500 officers were considered for promotion every year through the assessment of Officer Appraisal Forms. However, an April 1999 review determined that the number would increase to 65%, to make the process fairer. This would cause a huge increase in an already large administration overhead. Gaining promotion for an officer is a structured process, requiring the officer to have held their current rank for a specified time, to serve a mandatory "apprenticeship" and gain the experience required within that rank.

When this is completed, the officer is considered to be "in-zone" and eligible for assessment by a promotion board. However, if, after a specified period, an officer has not been promoted, he or she will cease to be in-zone and will continue to hold the same rank until the end of their career. The Officer Appraisal Forms are usually completed for each officer at 12 monthly

intervals and are passed to up to three senior officers for comment before being sent to the Promotion Section based at HM Dockyard, Portsmouth, which manages the Officer Appraisal process and the Promotion Boards. Known as the “Redbox” system, the files for every in-zone officer are placed in a red box for review by the Boards. (Officers that are over-zone can also be considered for promotion/transfer under certain circumstances) A full selection process requires two Selection Boards, each comprising four reviewing officers, requiring four copies of every file for each candidate. With each officer’s file typically containing 8-10 reports, and around 450 officers being considered by the largest Boards, this is a considerable task.

Management of this process was entirely manual, using paper based forms that were completed, reviewed, and returned to the Promotion Section. In addition, a key part of the Officer Appraisal Form is a “Profiling” section, which assesses and grades individual officers against 10 key Attributes, such as Leadership, Judgement, Initiative and Management Skills. This information had to be manually transferred from the Appraisal Forms to a “Profile Report” which summarised this information for all officers being considered by a particular board. There was also an anomaly in that “localised” versions of the appraisal form had evolved in different units; hence no single consistent form was in use, which obviously caused problems for the Promotion Section in managing and co-ordinating the process.

## **The Technology**

Central Database & Reporting System: Informix On-Line7

RDBMS Microsoft Visual Basic Crystal Reports Microsoft Office Desktop Appraisal

Capture System: Microsoft Access Microsoft Visual Basic Crystal Reports

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