

123210

BLUEPRINT 4D PRESENTATION

JUNE 9 – 13, 2025

PeopleSoft
RECONNECT
AT BLUEPRINT4D *LIVE!*

MEET SPEARMC



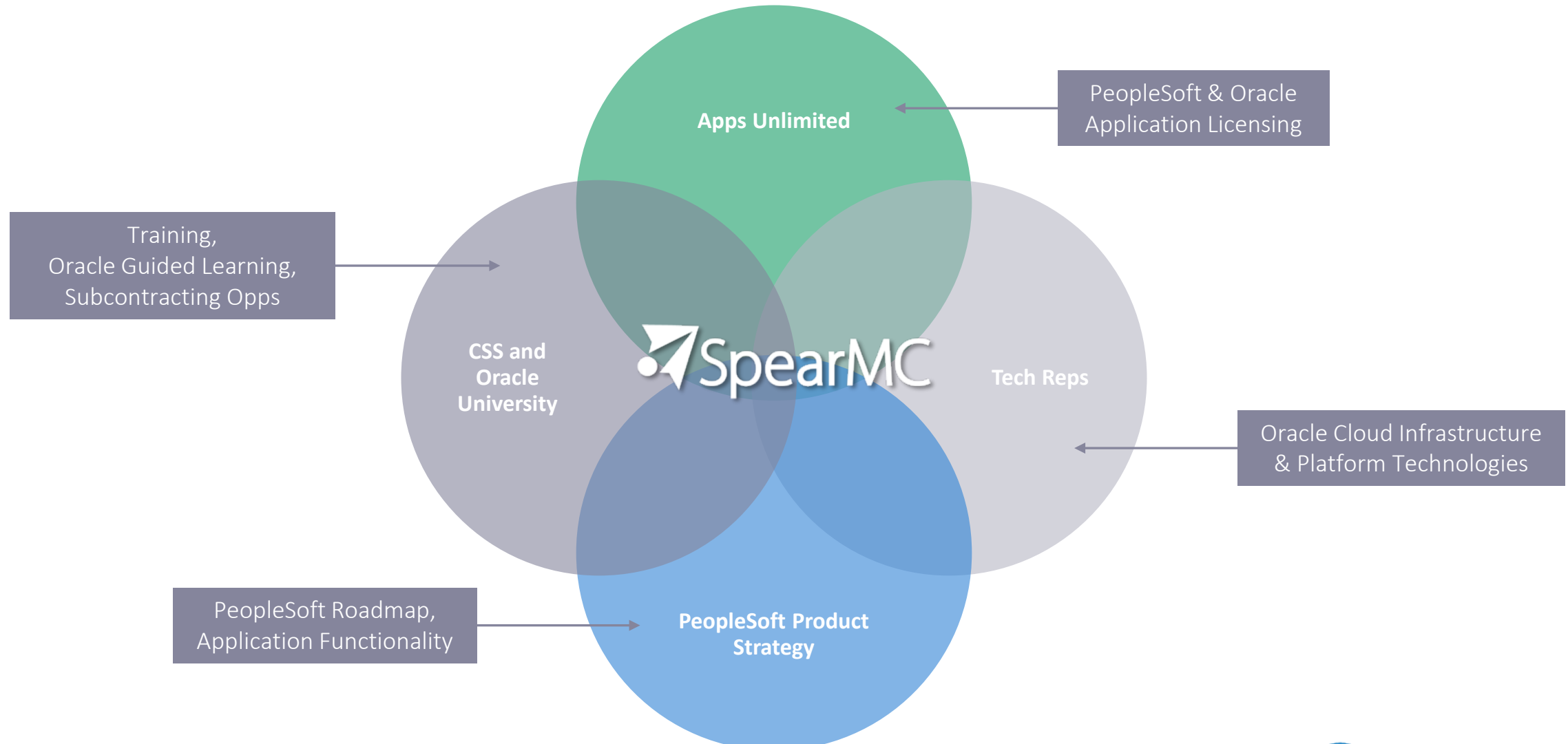
Randall Johnson

Vice President

Randall.Johnson@spearmc.com

(847) 507-7647

SPEARMC STRATEGY: POSITIONING WITH ORACLE



RECOGNITION AND SPECIALIZATIONS

Oracle Specialized

 **Partner**

Since joining Oracle's Partner Program in 2006, SpearMC was elevated to Platinum Partner level in 2017 and to Oracle Applications Managed Partner in 2018.

 **Expertise in PeopleSoft in North America**

SpearMC is an authorized PeopleSoft Resale Partner, allowing us to resell, host and finance PeopleSoft at steep discounts.

 **Expertise in Oracle EPM Cloud in North America**

SpearMC is an authorized Oracle EPM Cloud, Analytics and Hyperion Resale and Implementation Partner.

 **Expertise in Oracle Cloud Platform in North America**

SpearMC is an authorized Oracle Cloud Infrastructure (OCI) Resale Partner and North America's only PeopleSoft Partner recognized by Gartner for OCI Professional and Managed Services.

 **Education Reseller**

SpearMC is an authorized Oracle University Education Reseller and PeopleSoft Training Provider. We are the sole PeopleSoft Partner authorized to resell and implement Oracle Guided Learning.

 **Public Sector Addendum**

Reflecting our deep domain expertise in state and local government, SpearMC has a Public Sector Addendum in place allowing us to resell Oracle applications and technology to public sector organizations.

SOC 2 Type II Certified



Reduce risk with a partner you can trust. This certification demonstrates our deep commitment to protecting data.

Gartner-Recognized Vendor



SpearMC is the sole featured PeopleSoft vendor in the latest Gartner Market Guide for Oracle Professional Services.

Products and Services

HEALTHCARE | HIGHER ED | FINANCIAL SERVICES | PUBLIC SECTOR



Managed Services

PeopleSoft
Administration

PeopleSoft
Functional Support

PeopleSoft Infrastructure

PeopleSoft Development



PeopleSoft Expertise

Financials and
Supply Chain

Human Capital
Management

Campus Solutions

Enterprise Performance
Management



PeopleSoft Training

All-Access Learning Pass

Live Private Training

Oracle Guided Learning

Public Training Classes



PeopleSoft Products

Segregation of Duties

Grants Labor
Cost Distribution

OGI Starter Kit

PTF Testing Grounds



Oracle Cloud

PeopleSoft to
Cloud Migration

Oracle Fusion
Cloud Training

Oracle Cloud
Infrastructure

Cloud Learning
Subscriptions

ORACLE CONTRACT VEHICLES

Oracle Public Sector Addendum | Texas DIR | University of Texas System | E&I for Higher Education | CSU / Univ of CA / CCC | State of New York

PEOPLESOFT TRAINING OPPORTUNITIES

Learn from an Oracle University Partner

PeopleSoft Public Training Classes

You will gain Powerful, Practical Learning Experiences covering PeopleTools, Financials and Supply Chain Management, Human Capital Management, PeopleSoft Campus Solutions:

- **PeopleTools:** System Administration, Fluid Development, Security, PeopleCode
- **Bootcamps:** FSCM, HCM, PeopleTools
- **Reporting:** Query, PTF, BI Publisher, PeopleSoft Insights
- **FSCM:** Fluid Approvals & Delegations, Expenses, Procurement & Supplier Contract Management
- **HCM:** Core HR, Payroll, Benefits
- **Campus Solutions:** Advisement, Admissions, Registration, 3C's



[Visit our website](#) or scan the QR code for a full listing of available public courses and free webinars

PEOPLESOFT MATCH EXCEPTION COLLABORATION CENTER: EMPOWERING COLLABORATION EXCEPTION RESOLUTION

- From PeopleSoft perspective, Match Exception Collaboration Center is designed to enhance efficiency, transparency, and collaboration, ensuring a seamless experience for resolving match exceptions in your organization.
- In the PeopleSoft ecosystem, Match Exception Collaboration Center provides a robust platform for seamless collaboration and resolution of match exceptions. Here are the key features and benefits:
 - **Collective Exception Resolution:** Facilitates a collaborative approach, allowing multiple users to work collectively towards resolving match exceptions, streamlining the process and reducing bottlenecks.
 - **Role/User-Based Access:** Offers role-based and user-specific access control, ensuring that the right individuals have the appropriate permissions to address match exceptions, improving security and efficiency.
 - **Complete Audit Trail:** Maintains a comprehensive audit trail, ensuring accountability and transparency throughout the exception resolution process, meeting compliance and reporting requirements.

PEOPLESOFT MATCH EXCEPTION COLLABORATION CENTER: EMPOWERING COLLABORATION EXCEPTION RESOLUTION

- **Stakeholder Collaboration:** Fosters effective collaboration between various stakeholders, including procurement, finance, and supply chain teams, to collectively address and resolve exceptions, enhancing cross-functional cooperation.
- **Transaction Visibility:** Provides a powerful filtering mechanism to view transactions based on critical filters, enabling users to focus on the most relevant exceptions and expediting resolution efforts.
- **Communication Updates:** Allows for efficient communication updates within the platform, streamlining the process of addressing exceptions by ensuring all relevant parties are informed and engaged in the resolution process.

MATCH EXCEPTION COLLABORATION CENTER- FILTER CRITERIA

Match Exception Collaboration Summary



There are no exceptions to display.

Refine filters to do a new search.

Cancel

Filters

Done

From Date

10/14/2021



To Date

10/19/2023



Description

Assigned To



Match Rule ID



AP Business Unit



Voucher ID



Invoice ID



Supplier ID



Supplier Name



Aging (Days)

Discount Applicable

☐ No

*Match Exception Status

Equal to





PO Business Unit



PO Number



Reset

MATCH EXCEPTION COLLABORATION CENTER- FIELD SELECTION

← | ⌚ | ♥

Match Exception Collaboration Summary

⌵

⚙

There are no exceptions to display.
Refine filters to do a new search.

Cancel

Field Selection

Done

Assigned To	On ☐
Supplier ID	On ☐
Supplier Name	On ☐
Created	On ☐
Aging (Days)	On ☐
Discount Applicable	On ☐
Status	On ☐
Voucher BU	On ☐
Voucher ID	On ☐
Voucher Line	On ☐
PO BU	On ☐
PO ID	On ☐
PO Line	On ☐
PO Schedule	On ☐
Receipt BU	On ☐
Receipt ID	On ☐
Receipt Line	On ☐
Receipt Schedule	On ☐

Match Exception Detail

Save

Exception Total amount on the voucher line is different from the total PO amount associated with this voucher line.
Rule RULE_E250 Voucher Ext.Amt <> PO Ext.Amt (No Tolerances)

Review/Take Action

Transaction Summary

Voucher	Purchase Order	Receipt
Business Unit US001	Business Unit US001	Business Unit US001
Voucher ID POAP-EXC	PO Number POAP-EXCP	Receipt Number POAP-EXCP
Line 1	Line 1	Line 1
Quantity 100.0000	Quantity 100.0000	Quantity 100.0000
Unit of Measure EA	Unit of Measure EA	Unit of Measure EA
Unit Price 21.00000	Unit Price 20.00000	Unit Price 20.00000
Item ID 10007	Item ID 10007	Item ID 10007

Exception Action

Assigned To

*StatusOpen

Resolution Code

CommentsAttachments (0)Groups/Users Assigned

FIVECUBES 47

← | ⌚ | ♥

Match Exception Detail

Exception Rule Review/Take Action

Transaction Summary

Voucher

Business Unit US001

Voucher ID POAP-EXC

Line 1

Quantity 100.0000

Unit of Measure EA

Unit Price 21.00000

Item ID 10007

Exception Action

Assigned To

Resolution Code

Actions

Transaction Details

Add/Update POs

PO Inquiry

PO Activity Summary

PO Document Status

Add/Update Receipt

Receipt Document Status

Voucher Regular Entry

Match Workbench

Voucher Document Status

Supplier

Search in Menu

er line is different from the total PO amount associated with this voucher line.

Amt <> PO Ext Amt (No Tolerances)

Purchase Order

Business Unit US001

PO Number POAP-EXCP

Line 1

Quantity 100.0000

Unit of Measure EA

Unit Price 20.00000

Item ID 10007

Receipt

Business Unit US001

Receipt Number POAP-EXCP

Line 1

Quantity 100.0000

Unit of Measure EA

Unit Price 20.00000

Item ID 10007

Comments

Attachments (0)

Groups/Users Assigned

Match Exception Detail

Save

Rule RULE_E250 Voucher Ext Amt <> PO Ext Amt (No Tolerances)

Review/Take Action 

Transaction Summary

Voucher	Purchase Order	Receipt
Business Unit US001	Business Unit US001	Business Unit US001
Voucher ID POAP-EXC	PO Number POAP-EXCP	Receipt Number POAP-EXCP
Line 1	Line 1	Line 1
Quantity 100.0000	Quantity 100.0000	Quantity 100.0000
Unit of Measure EA	Unit of Measure EA	Unit of Measure EA
Unit Price 21.00000	Unit Price 20.00000	Unit Price 20.00000
Item ID 10007	Item ID 10007	Item ID 10007

Exception Action

Assigned To  Keerthi Byri *Status

Resolution Code 

Comment History

Datetime 	User 	Name 	Comments 
10/19/2023 08:52:10 PM	GKASLIWAL	Gorish Kasliwal	This exception was assigned to 'KEERTHI.BYRI' by 'GKASLIWAL'
10/19/2023 08:52:12 PM	GKASLIWAL	Gorish Kasliwal	Status has been changed from 'Open' to 'Assigned' by 'GKASLIWAL'

Comments

Attachments (0)

Groups/Users Assigned

- Over 1,000 match exceptions generated per month
- All exceptions funneled through purchasing for evaluation and assignment
- Handled through a ‘collaboration’ tool without integration to PeopleSoft
- Manual notifications by Accounts Payable to requestor of receipt of invoice

- **MECC Does NOT Change Match Exceptions:** The matching process simply doesn't change with the MECC. Violations are violations, regardless of rules triggered.
- **Just Get Started:** MECC is collaborative, and lessons will be learned on a continuous basis. Get started quickly and fine tune rules and assignments based on experience and feedback.
- **Feel Free to Start Small:** Assign rules to select few groups to start. Fine tune as 'reassignment' patterns emerge.
- **Post Implementation – Continue to Meet Regularly:** Observations of common exceptions will spawn changes. Collaboration should exist within the MECC as well as interpersonally.
- **Prioritize Rules Based on Commonality:** Certain conditions regularly produce multiple related rule violations. Resolving one rule can have the affect of removing subsequent violations.
- **Develop 'Pre-emptive' Notifications:** Consider the Notification Framework to alert users of new transactions which require processing to avoid exceptions from being created.

- **MECC “Dashboards”:** Delivered listing / dashboard has great filtering and sorting capabilities for assigned users for resolution processing. A ‘wholistic’ dashboard for management should be considered for development:
 - **Historical Trending:** Visualization showing volume of exceptions by Rule over a defined timespan. This can help to highlight potential for business process change, or even to highlight the success rate from new processes implemented over time.
 - **Top ‘Violators’:** Visualizations to show top violations based on Requestor, Buyer, Receiver, and Supplier. This would provide an opportunity to mitigate issues through targeted training initiatives.
 - **Average Time to Resolve:** Visualizations showing specific Rules and the average aging for resolution can prompt discussions for business process change.
 - **Overridden Rule Tracking:** Visualizations for violations which were resolved by ‘Override’ could highlight unnecessary rules which could be enhanced or even eliminated.
- **Potential for AI Support:** As patterns emerge, machine learning and AI can provide insights on standard steps performed to resolve, giving users support on resolution options, or even performing resolution steps automatically.

WELCOME TO BLUEPRINT 4D

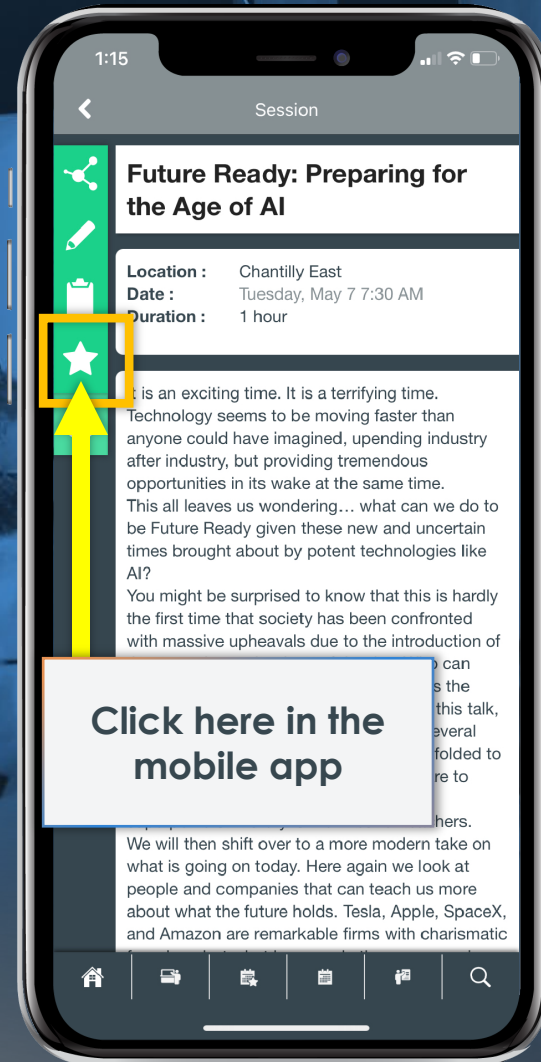
QUESTIONS?

RATE THIS SESSION!

SESSION TITLE:

SPEAKER:

PRESENTATION ID:



Complete 3 or more session surveys in a day and you'll be entered to win a **\$500 gift card!**

PeopleSoft

RECONNECT
AT BLUEPRINT4D *LIVE!*

JUNE 9 - 13, 2025
THE VENETIAN | LAS VEGAS, NV

PeopleSoft

RECONNECT

DIVE DEEP - VIRTUAL!

Save the Date:

October 27 - 30, 2025



Join us online for RECONNECT Dive Deep
Practical, hands-on learning for the PeopleSoft community.

At **PeopleSoft RECONNECT Dive Deep**, PeopleSoft customers of all levels can dig into new releases, dive deep into practical learning, get new ideas from best practices and hone their core PeopleSoft skills during four jam-packed digital days of education and networking. Attendees can chat with the experts, connect with and learn from other users and meet solutions providers.

All digital, all PeopleSoft – join us online **October 27 – 30, 2025**.

Call for presentations opens **June 25!**



Speaking at **RECONNECT Dive Deep** is a great way to build your reputation, meet new people and give back to the PeopleSoft community.

Plus primary speakers get discounted registration at the event!

questoraclecommunity.org/rcdd

SPEARMC SESSIONS AT BLUEPRINT 4D

Date	Time	Session Title	Presenter	Session #
June 10 th	4:00 PM	Executive Customer Panel - Oracle Guided Learning	Cameron McClurg	P-050161
June 11 th	4:00 PM	PeopleSoft Match Exception Collaboration Center - Real World Lessons Learned!	Randall Johnson	P-050063
June 13 th	10:00 AM	Modernizing Grant and Subaward Management: A Comprehensive PeopleSoft Demo	Jessica Mann	P-050913

2025 TRAINING CALENDAR

Upcoming Class Schedule

Date	Session
June 10	PeopleTools – Activity Guides
June 17	PeopleTools – BI Publisher
June 19 – 20	PeopleTools – Portal Technologies
June 24 – 25	PeopleTools – Lifecycle Management & PUM
July 9	PeopleSoft 9.2 Query Basic & Intermediate for FSCM
July 10	PeopleSoft 9.2 Query Advanced for FSCM
July 15 – 17	PeopleTools I & II
July 22 – 23	PeopleCode I & II
July 24	Oracle SQL for PeopleSoft
July 29 – 30	Application Engine

Visit our [website](#) for more information