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PeopleSoft Match Exception Collaboration Center - Real World Lessons Learned!

Session P-051437



PeopleSoft RECONNECT Dive Deep 2025

October 27 – 30, 2025

Meet Mythics



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**50/50 States
Supported**

Across multiple functional
disciplines



**15/15 Cabinet Agencies
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mission areas



**400+ Higher Education
Customers Supported**

Enabling our future leaders



**500+ Commercial Customers
Supported**

Supporting a wide range of
commercial areas



**500+ Cloud
(SaaS and OCI)
Projects**

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Workloads



**100,000+ Oracle
Transactions**

Experience Matters



**1,500+ Oracle
Implementations**

Application Specialists



**1,650 Oracle Cloud
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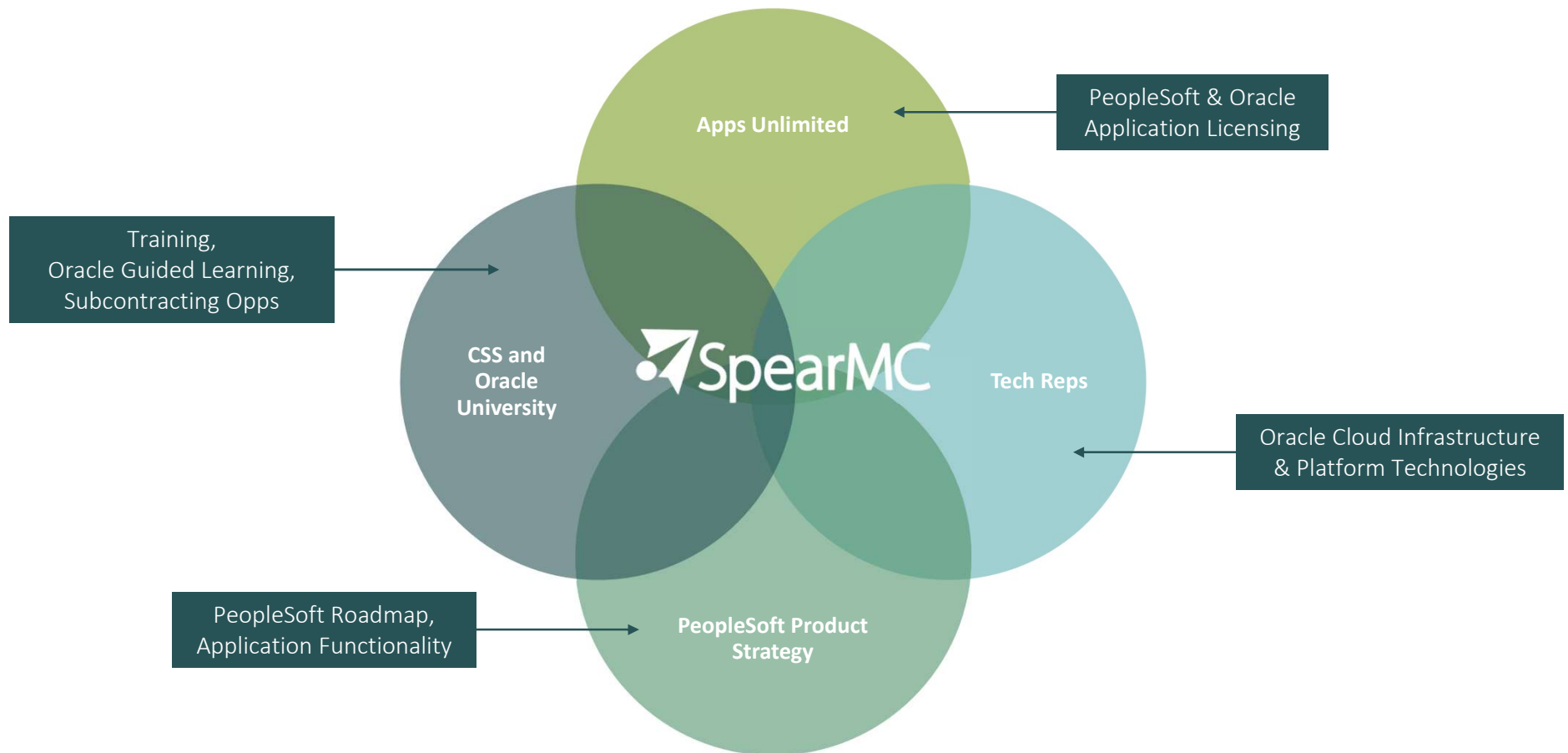


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SpearMC Strategy: Positioning with Oracle



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

OGL Starter Kit

PTF Testing Grounds



Oracle Cloud

PeopleSoft to
Cloud Migration

Oracle Fusion
Cloud Training

Oracle Cloud
Infrastructure

Cloud Learning
Subscriptions

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- **FSCM:** Fluid Approvals & Delegations, Expenses, Procurement & Supplier Contract Management
- **HCM:** Core HR, Payroll, Benefits
- **Campus Solutions:** Advisement, Admissions, Registration, 3C's



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And now, the main
event...

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.

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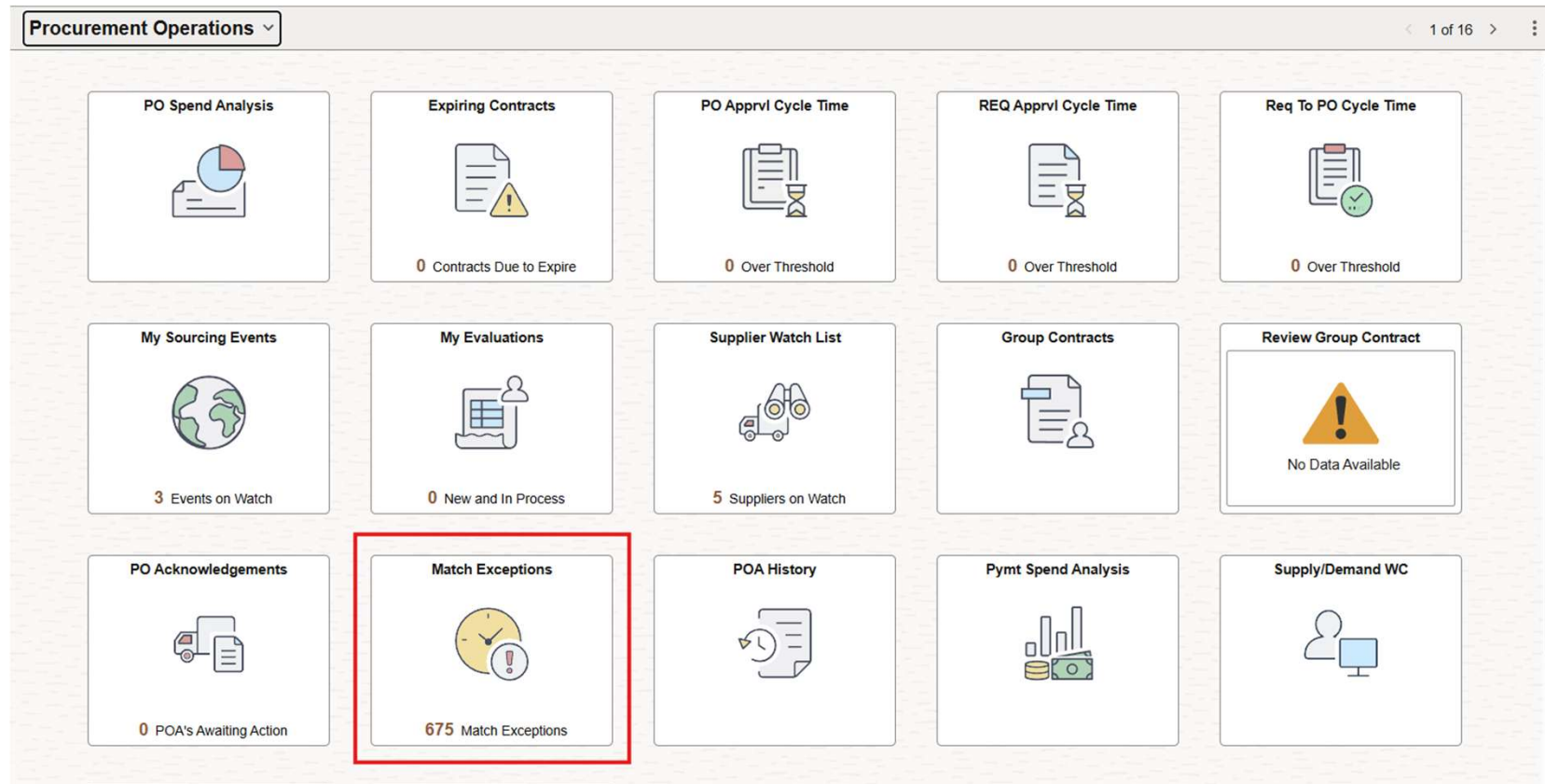


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PeopleSoft Match Exception Collaboration Center: Empowering Collaboration Exception Resolution

- **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- Tile



Match Exception Collaboration Center- Filter Criteria

Match Exception Collaboration Summary




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

Cancel
Done

Filters

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 Collaboration Center- Summary

Match Exception Collaboration Summary

Exceptions from 9/10/2018 to 9/15/2025, your oldest exception was created on 11/28/2023

675 row



Match Exceptions Voucher Details Purchasing Details **Receiving Details** Show All

Description ↕	Receipt Unit ↕	Receipt ID ↕	Receipt Line ↕	Shipping Seq ↕	Quantity ↕	Unit Price ↕	UOM ↕	Item ID ↕	
No receipts found									⋮ >
No receipts found									⋮ >
Voucher Pay Terms <=> PO Pay Terms	BUY07	REMP-202	1	1	2.0000	25.00000	BOX		⋮ >
Total voucher received quantity > Accepted Qty	BUY07	REMP-202	1	1	2.0000	25.00000	BOX		⋮ >
Voucher Pay Terms <=> PO Pay Terms									⋮ >
Voucher Pay Terms <=> PO Pay Terms	BUY07	REMP-202	3	1	1.0000	30.00000	BOX		⋮ >
Total voucher received quantity > Accepted Qty	BUY07	REMP-202	3	1	1.0000	30.00000	BOX		⋮ >
Voucher Pay Terms <=> PO Pay Terms	BUY07	REMP-202	4	1	2.0000	15.00000	BOX		⋮ >
Total voucher received quantity > Accepted Qty	BUY07	REMP-202	4	1	2.0000	15.00000	BOX		⋮ >
Total voucher received quantity > Accepted Qty	BUY07	REMP-204	1	1	1.0000	210.00000	BOX		⋮ >
Total voucher received quantity > Accepted Qty	BUY07	REMP-204	3	1	1.0000	160.00000	BOX		⋮ >
Total voucher received quantity > Accepted Qty	BUY07	REMP-212	3	1	1.0000	30.00000	BOX		⋮ >
Total voucher received quantity > Accepted Qty	BUY07	REMP-212	4	1	2.0000	15.00000	BOX		⋮ >

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Match Exception Collaboration Center- Details Page

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

*Status
Open

Resolution Code

Comments
Attachments (0)
Groups/Users Assigned

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Match Exception Collaboration Center- Audit

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 Keerthi Byri

*Status: Assigned

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

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NEW: Match Exceptions Insights Dashboard Image 54

Match Exception Collaboration Center- Insights Dashboards

https://www.youtube.com/watch?v=lvYcPUzS_I4

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Real World Lessons Learned

- **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 effect 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.

Real World Lessons Learned – Future Plans

- **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.
- **Assign “Supplier” Users to Exceptions:** Automatically assign certain exceptions to suppliers to resolve through the Supplier Portal. Integrate with eSettlements to initiate ‘disputes’ to be resolved by suppliers.



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Appendix

PeopleSoft
RECONNECT
DIVE DEEP - VIRTUAL!

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October 27 – 30, 2025

SpearMC Sessions at Reconnect



Date	Time (ET)	Session Title	Presenters	Session #
October 28	1:45 PM	Training, Policy Management and Change Management Made Easy with Oracle Guided Learning	Cameron McClurg	P-051593
October 29	11:15 AM	Fluid Performance Management: Tips, Tricks & Best Practices	Logesh Balasubramaniam	P-051596
October 29	12:30 PM	From Data to Decisions: Making the Most of PeopleSoft HCM Insights	Gary Dranikoski Logesh Balasubramaniam	P-051843
October 29	1:45 PM	AI-Powered Cloud: What's New in Oracle OCI and PeopleSoft	Joe Finlinson Cameron McClurg	P-051594
October 29	1:45 PM	Optimize Student and Employee Journeys with the power of Activity Guides	Logesh Balasubramaniam	P-051597
October 30	1:45 PM	PeopleSoft Match Exception Collaboration Center - Real World Lessons Learned!	Randall Johnson Gary Dranikoski	P-051437
October 30	1:45 PM	PeopleSoft vs. Oracle Fusion Cloud: A Side-by-Side Look at Grants Management	Jessica Mann	P-051824

2025 – 2026 Training Calendar

November 2025 Class Schedule

Date	Session
Nov 3	<u>PeopleSoft 9.2 Query Basic & Intermediate for Campus Solutions</u>
Nov 4	<u>PeopleSoft 9.2 Query Advanced for Campus Solutions</u>

January 2026 Class Schedule

Date	Session
Jan 7	<u>PeopleSoft 9.2 Query Basic & Intermediate for FSCM</u>
Jan 8	<u>PeopleSoft 9.2 Query Advanced for FSCM</u>
Jan 13-15	<u>PeopleTools I & II Accelerated</u>
Jan 20-21	<u>PeopleCode I & II Accelerated</u>
Jan 28-29	<u>PeopleSoft Insights with OpenSearch Technologies</u>

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2026 Training Calendar

February 2026 Class Schedule

Date	Session
Feb 2-3	<u>PeopleTools – Application Engine</u>
Feb 9	<u>PeopleSoft 9.2 Query Basic & Intermediate for HCM</u>
Feb 10	<u>PeopleSoft 9.2 Query Advanced for HCM</u>
Feb 10	<u>HCM Bootcamp – Core HR</u>
Feb 11	<u>HCM Bootcamp – NA Payroll</u>
Feb 12	<u>HCM Bootcamp – Benefits Administration</u>
Feb 12-13	<u>Oracle SQL & SQR for PeopleSoft</u>
Feb 17	<u>PeopleSoft Maintenance Tools & Strategies</u>
Feb 18-19	<u>PeopleTools Integration Broker Configure & Administer</u>

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March 2026 Class Schedule

Date	Session
Mar 3	PeopleTools – Activity Guides
Mar 5	PeopleTools Security (Functional) for FSCM & HCM
Mar 9-10	PeopleTools Security (Technical)
Mar 11-12	PeopleTools – Fluid UI Development
Mar 17-20	PeopleTools System Administration: Maintenance and Troubleshooting

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