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Oracle's PeopleSoft ALM, ESA, FMS, SCM, and SRM Release 9.2 Release Value Proposition

An Executive Summary of Oracle's FSCM v9.2 RVP

Executive Summary

FMS and ESA 9.2

The MIPRO project team's review and analysis of Part 1 of the 9.2 FSCM RVP reveals a number of noteworthy changes and additions relating to FMS and ESA performance and capabilities. As stated in the Executive Summary of the RVP itself, the 9.2 FSCM design and functionality was conceived based on three core design principles: "Simplicity, Productivity and Lowered Total Cost of Ownership (TCO)—as well as new application functionality as prioritized by our customers." The RVP also outlines a broader initiative to align PeopleSoft offerings with an overall Oracle applications strategy, a two-part mission that is slated to: "...expand integrations between PeopleSoft and other Oracle applications" and "...include adoption of Oracle's standards based technology and optimization on Oracle database."

In the long-term, this is a promising approach to PeopleSoft functionality and compatibility. For 9.2, that translates to the inclusion of new PeopleTools features into the applications and enhancements to common features. Many of these features deliver significant changes in the look, feel and usability of the applications. Work Centers use Business Intelligence (BI) tools to help make the everyday user's tasks easier to deal with. While each application integrates these new tools differently and should be individually reviewed for more detail, some of the highlights include:

- Portal has been renamed Interaction Hub, with basic features included in PeopleTools—including integrated cross-module navigation.
- Workflow improvements and extensions, including expanded attachment capabilities.
- New user-customizable search tools with available keyword search tab.
- PeopleBooks upgrades and enhancements, including process flows and imbedded search.
- Security and support upgrades, including credit card payment data relocation to a third party site.
- Mobile Device optimization (PeopleSoft on your iPad!), as well as mobile device workflow approvals for expense reports, requisitions and other documentation.

Financial Management Solution (FMS)

New and expanded Financial Control options in PeopleSoft 9.2 include significant upgrades to both General Ledger and Treasury Management components, as well as Source to Settle (Supply Chain) upgrades. Noteworthy changes include:

General Ledger and Treasury
- New balance sheet configuration options
- Added an adjustment period option for average daily balances
- Improved T-Account visibility
- Enhanced General Ledger and Hyperion integration
- Ability to set combination editing rules by source
- Workflow enhancements and additional payment and prepayment flexibility
- Payroll integration with Financial Gateway
- Improved cash forecasting and multicurrency accounting in Treasury changes.

Supply Chain
- Predefined user fields
- Display price adjustment amounts on requisitions
- Range of enhancement to Supplier interaction and capabilities
- Improved tracking and usage of substitute items
- New transaction category identification options
- Support for healthcare Global Location Number (GLN)
- PO enhancements
- Centralized sourcing event documents and attachments for buyer and collaborator
- New filter criteria for sourcing event workbench to show events by status
- Renamed "vendor" to "supplier"; changing all references on pages and documentation
- Supplier item ID added to supplier pages
- Basic usability/convenience enhancements, such as sourcing event-line scrolling and collaborator comment functionality
- Improved sourcing event security
- Simplified ePro user interface, including access to supplier catalogs without leaving ePro requisition and individual requisition page customization options
- Services Procurement and Resource Management integration
- Supplier hierarchy option to manage international procurement process
- Simplified voucher entry page and cross-check capability for Tax ID and IRS data to prevent duplicate supplier entries

Enterprise Services Automation (ESA)

The noteworthy new ESA features in PeopleSoft 9.2 include a number of upgrades with exciting implications for Program and Portfolio Management:

- New summarization options for source and pricing transactions
- Rounding and accelerated processing available for Funds Distribution
- Improved run times for rate plan pricing
- Added re-pricing transactions and improved variance pricing
- Flexible rate sets by cost and/or billing rows
- Newly simplified capture of project costs and revenue
- New rate definition customizability
- Added manager transaction review control and billing adjustment
- Supplemental data feature usable with projects
- Several new user interfaces, including for mobile devices
- Upgraded expense report approval, review and attachment options
- Range of available expense report financial summaries and status display options
- More credit card transaction detail, including level 3 data if available (pre-itemized)
- Configurable expense certification message wording
- Additional role-based template settings
- Improved timesheet approval, per diem rules and enforcement
- Added integration with Services Procurement for resource information
- Mass completion of assignments now an option
- Improved HCM interface to identify inactive employees
- Ability to limit interfaced personal data for privacy

While PeopleSoft HCM 9.2 has added a number of conveniences, it's clear that PeopleSoft FSCM 9.2 takes that to another level. The changes to this module are more significant, and include both "quality of life" conveniences and relatively dramatic and transformative functionality, integration