

International specialist bank strengthens expense management through Oracle iExpenses rollout

APPSolve supports the implementation of Oracle Expense Reports within a wider Financials and Procurement transformation

Executive summary

An international specialist banking and wealth management group has strengthened its employee expense-reporting environment through the implementation of Oracle Expense Reports, also known as Oracle iExpenses. The organisation serves private, corporate and institutional clients, with its principal markets in South Africa and the United Kingdom and a broader international footprint. Employing more than 7,000 people, it operates in a highly regulated environment where financial controls, governance, user experience and technology must work together.

While expense reporting may represent one part of a large enterprise platform, it affects employees, managers, finance teams and approvers across the organisation. Its success depends on accurate configuration, clear approval processes and alignment with financial and procurement controls. The project demonstrates how focused module expertise can support a wider finance transformation while giving the client continuity from implementation into ongoing operation.

Challenges

The Oracle iExpenses implementation had to be delivered within the structure of a much larger Financials and Procurement programme. This created a complex set of dependencies. Decisions relating to accounting, data, approvals, procurement processes and governance could not be made in isolation, as changes to the expense-reporting module had the potential to affect other areas of the Oracle environment.

Expense management also has a broad operational reach. Employees need a practical way to submit expenses, managers need a consistent approval process, and finance teams need accurate information that can be processed and reviewed in line with organisational policies. In a banking environment, those requirements are reinforced by the need for strong auditability, controlled access and consistent application of financial rules.

The implementation therefore needed to balance user requirements with the organisation's control framework. It also had to align with programme timelines and the wider Oracle design. The challenge was not simply to activate a new module, but to ensure that it became a stable and well-supported part of the organisation's enterprise finance environment.

The bank also required continuity after go-live. New questions, configuration needs and user-support requirements often emerge when a system moves into production. Maintaining access to a team that understood both the iExpenses module and the wider programme context was important during this transition.

Solution

APPSolve provided specialist Oracle support for the implementation of iExpenses as part of the broader Financials and Procurement transformation. Its role focused on helping the bank introduce the module in a way that aligned with the wider Oracle environment and supported the organisation's operational and governance requirements.

The work required collaboration across finance, procurement and technology teams. Rather than treating expense reporting as a separate deployment, APPSolve worked within the broader programme structure, taking account of shared processes, data and controls. This helped position iExpenses as an integrated part of the enterprise platform.

APPSolve combined functional and technical capability with active management involvement. This gave the project access to experienced Oracle resources while also providing a clear route for escalation and decision-making when additional input was required. The team responded to ad-hoc requests and provided advice as the implementation progressed, supporting both immediate delivery requirements and the wider programme objectives.

Following the production go-live in 2023, APPSolve continued to support the system. This created continuity between implementation and operational support, allowing the bank to work with a team that already understood the configuration, project decisions and relationship between iExpenses and the wider Financials and Procurement environment.

The ongoing engagement also allowed APPSolve to provide guidance as new requirements emerged. The relationship developed beyond issue resolution, with APPSolve serving as a long-term Oracle

adviser able to assist with additional requests and help the bank maintain the system after implementation.

Implementation highlights

A key feature of the project was the integration of the iExpenses workstream into a broader Oracle transformation. The module was implemented alongside Oracle Financials and Procurement capabilities, requiring coordination with the wider programme and careful alignment with shared business processes.

The go-live in 2023 marked the transition from implementation into active production use. APPSolve remained involved after this milestone, supporting the bank as the new environment moved into day-to-day operation. This reduced the risk of a knowledge gap between the project and support phases and ensured that questions could be addressed by people familiar with the original implementation.

The engagement was also characterised by responsive support and direct management participation. In a regulated financial-services environment, the ability to escalate issues quickly and obtain informed advice can be as important as the initial configuration work. APPSolve's approach gave the bank access to both delivery resources and senior oversight throughout the engagement.

Results

The Oracle iExpenses module went live successfully as part of the bank's wider Oracle Financials and Procurement implementation. The organisation moved into production with continued access to APPSolve's Oracle expertise, ensuring that implementation knowledge remained available during the operational phase.

The engagement provided a consistent support model across project delivery and post-go-live operation. The bank benefited from responsive assistance, experienced resources and active management involvement, while APPSolve gained the context needed to advise on additional requirements as they arose.

The project also strengthened the long-term relationship between the two organisations. By remaining involved beyond the implementation milestone, APPSolve established itself as a trusted

Oracle adviser rather than a once-off project supplier. This gave the bank greater continuity and confidence as the iExpenses environment became part of its broader finance technology landscape.