

# Smart Solutions for PeopleSoft Customers

*Smart ERP Solutions® provides innovative add-on solutions, designed to enhance PeopleSoft applications with functionality well beyond the standard capabilities.*

## COMPANY OVERVIEW

With a staff comprised of the best former PeopleSoft architects, analysts and developers, at SmartERP™, we understand how to deliver cost-effective, robust solutions to your toughest challenges, offering pre-configured proven “Smart Solutions” for your existing PeopleSoft applications. We understand that your organization has a huge investment in your existing PeopleSoft infrastructure and our goal is to allow you to more effectively and efficiently reap the benefits of that investment for many years to come. SmartERP builds solutions that align the strategies and goals of your organization around what we refer to as the three C’s; common, critical and complementary. Common to PeopleSoft customers, critical to your business requirements, and complementary to your existing PeopleSoft Products.

The SmartERP model is unique in that after utilizing our extensive PeopleSoft development experience to solve your difficult challenges, we then package the solution using an innovative bolt-on design that can be easily deployed and configured to meet each client’s individual needs. Our solutions are independent of application and PeopleTools releases, and quick to implement with minimal impact to maintenance and future upgrades. Plus, if you need a new solution — one that could potentially apply to other PeopleSoft customers — we may be able to share costs and co-develop it with your organization.

We take great pride that our solutions have been designed with these key objectives as our guiding design principles. Our clients find our solutions to be both extremely cost effective and robust; if you don’t see a solution inside for your particular PeopleSoft application challenge, please don’t hesitate to let us know directly or through your services provider.

### Smart Security™

Standard PeopleSoft Financials can be configured to restrict data access based on business unit, SetID, book, ledger, pay cycle or project. However, there is no delivered functionality that can restrict access based on other desired field values such as ChartField values, bank accounts, or others critical to your individual business practices. SmartERP addresses this limitation with Smart Security.

#### Key Features of Smart Security include:

- Flexible and configurable options to restrict data security by ChartFields or any other fields
- Limits security by ‘user’ or ‘permission list,’ ‘row security class,’ or ‘role’ level
- Allows context-based security
- Extends security capabilities to any reporting solution such as Cognos, Business Objects or Oracle Business Intelligence
- Enforces security during data entry and inquiry pages
- Allows business users to easily maintain security configurations on their own, without IT intervention, including applying and undoing security changes
- Helps maintain Sarbanes Oxley compliance with transaction authorizations
- Designed with minimal customization impact and minimal upgrade impact
- Works with all PeopleSoft applications and PeopleTools releases

Online demo at:  
[www.smarterpsolutions.com/smartsecurity.php](http://www.smarterpsolutions.com/smartsecurity.php)

### Smart Workflow™

Current PeopleSoft applications provide various workflow features that vary by module, do not have a consistent look and feel, and do not satisfy all the needs of PeopleSoft users to effectively manage their day-to-day tasks. Recognizing the gaps that exist between the PeopleSoft standard workflow solutions and current business requirements, SmartERP developed Smart Workflow to allow consistent and robust approval workflow capabilities to be extended to all PeopleSoft documents, such as a journal, voucher, requisition, and purchase order, or other documents that require workflow approval capabilities.

Smart Workflow empowers the individual business user to define and alter routing rules when their business requirements change. This replaces the inefficient process of requesting IT support in order to configure workflow capabilities to address immediate needs.

#### Key Features of Smart Workflow include:

- Common approval framework for all required documents in financials, supply chain, and ESA (journals, vouchers, requisitions, purchase orders, etc.)
- Configurable common approval inbox, which replaces the standard PeopleSoft work list
- Common approver setup with user friendly Approver Wizard
- Routings and approvals can be by amount and/or field values and can have multiple levels and stages
- Approval rules and approver setup is both wizard-based and designed to be used by the business user rather than IT personnel
- Supports parallel and sequential approval paths, and workflow attachments
- Allows ad hoc approvers and reviewers to be easily inserted into the approval cycle
- Graphical display showing the status of the document at all approval stages

- Electronic/digitized signatures for invoice approvals and other areas
- Flexible report for an administrator to review the various approver setups
- Designed with minimal customization impact and minimal upgrade impact
- Works with all PeopleSoft applications and PeopleTools releases

Online demo at:  
[www.smarterpsolutions.com/workflow.php](http://www.smarterpsolutions.com/workflow.php)

### Smart Docs™

Have you ever thought, “Why do I have to see so many fields on the page when I only need to fill in three or four pieces of information for a transaction?” Or, “Why are so many difficult-to-maintain customizations required to tailor PeopleSoft for my industry and business processes?” You’re not alone. PeopleSoft standard pages are designed for a very wide audience of users and therefore, those pages may include many fields that represent industries or capabilities not applicable to your organization. The standard pages may also represent a data entry flow that does not match your individual business process flow. If such challenges sound familiar, then Smart Docs is for you.

SmartERP has developed a framework that easily enhances standard PeopleSoft business processes, tailoring them to meet your specific needs, and giving your users the most efficient and easy-to-understand PeopleSoft experience possible. With Smart Docs, you can control which fields are displayed and where they are displayed; insert additional business logic; and enhance many other properties of a page with minimal impact to the standard PeopleSoft code line. Smart Docs makes enhancing any standard PeopleSoft business process incredibly easy. To tailor business processes to meet your needs, whether to make them

simpler or to add additional functionality, Smart Docs makes such enhancements through simple configurations, not complicated customizations. For example, one client enhanced productivity and empowered end users by using Smart Docs to enable their staff to simply and intuitively complete their own requisitions.

#### Key Features of Smart Docs include:

- Provides the capability to decentralize business processes, and empowers end users
- Configurable pages for any document based on your business requirements (requisition, PO, voucher, student, employee, etc.)
- Reduces input errors and training costs and allows for improved data quality
- Provides for customer-defined business logic and industry-specific labels and fields
- Built-in row level field security and privilege security
- ChartField shortcut capability
- Attachment functionality
- Reduced training costs
- Increased productivity
- Embedded analytics
- Workflow integration
- Print capability
- Designed with minimal impact to maintenance and upgrades
- Works with all PeopleSoft applications and PeopleTools releases

### Smart Flex UI™ (User Interface)

Is the user interface look and feel of the standard PeopleSoft Internet Architecture pages too difficult for your casual users? Or do you need PeopleSoft pages with a more modern contemporary look using graphically rich media elements and designs? Then Smart Flex UI is for you.

SmartERP has developed a framework that easily transforms and replaces the standard PeopleSoft user interface, delivering a totally different contemporary look and feel that is more presentable, intuitive, and readily usable by casual users. Smart Flex UI uses this framework to seamlessly transform the look and feel of PeopleSoft pages, using the graphically rich elements of Adobe Flex with minimal impact to the standard PeopleSoft code line. Smart Flex UI leverages Adobe Flex, based on the powerful Flash platform, bringing rich internet application capabilities such as animation into your PeopleSoft application.

**Key Features of Smart Flex UI include:**

- Rich user interface utilizing such powerful features of Adobe Flex as form validation and animation
- Decentralizes business processes by enabling PeopleSoft pages to utilize rich media internet application features to which your users are now accustomed
- Reduces training costs
- Increases productivity and user adoption by presenting transactions in a manner users are used to seeing them
- Designed with minimal customization impact and minimal upgrade impact
- Works with all PeopleSoft applications and PeopleTools releases

**Smart Keys™**

The chart of accounts (COA) in PeopleSoft Financials consists of several different field values of varying lengths. Depending on the type of transaction and the functional unit (business unit) to which it applies, there could be as many as 14 different field values to enter, consisting of over 50 characters. PeopleSoft provides some “quick entry” features, such as Speed Types and Speed Charts, but these are not consistently applied in

all areas within PeopleSoft Financials and have known gaps for certain types of transactions.

Smart Keys is the solution for this business problem. Smart Keys automatically translates values returned from these other systems into the appropriate COA values. This solution can also be extended to other systems, both internal and external.

**Key Features of Smart Keys include:**

- Uses journal spreadsheet import to automatically expand ChartField values
- Extends to third party systems, both internal and external, so other systems need only use simple Smart Keys, not all of the complicated COA values from PeopleSoft
- Exception view for those Smart Keys that could not be auto-generated
- Approval on manually created Smart Keys
- Auto-approval for Smart Keys that are generated from projects/grants pages
- Auto-inactivation of Smart Keys that are generated when budget exceptions are corrected
- Effective dating on Smart Keys data structures
- Highly configurable design to nominate any unused ChartField as a Smart Key
- Alternate Smart Key lookup using another ChartField (e.g., DEPTID)
- Smart Keys can be generated manually and automatically via combo rules, projects and grants

**Smart B2B Integrators™ (Go Paperless)**

With the help of Smart B2B Integrators, all XML documents sent by vendors and customers (such as invoices, payments, etc.) can be automatically loaded into the PeopleSoft system to streamline the business process. With the help of this solution, paper-based processes

can be eliminated, creating efficiencies, increasing productivity, and reducing errors.

An example Smart B2B Integrator is the ‘Electronic Invoice’ solution.

**Key Features of Electronic Invoice include:**

- Automates invoice processing for different types of XML invoices
- Supports standards such as cXML, UBL, OAG, and ebXML
- Creates vouchers based on predefined supplier and buyer agreement
- Voucher distributions are created based on allocation rules
- Approvals can be enabled at header and line level based on configurable approval rules
- Provides electronic signature verification for incoming XML Invoices
- Handles high volume invoice transactions

**Smart Loader™**

Smart Loader is a key component of many of our solutions. Smart Loader allows any data from a spreadsheet to be entered into a corresponding PeopleSoft table, including vouchers, journals, or vendors. The solution has built-in PeopleSoft security features to prevent unauthorized data entry, and data transformation capability so you can convert the XLS data to your relational database structure and configurable mapping components. Smart Loader can be used with our Smart Diversity Reporting solution to efficiently and automatically load suppliers back into PeopleSoft. It can also be used to mass load set-up data required for our Smart Security and Smart Workflow solutions.

**Key Features of Smart Loader include:**

- Ability to quickly and effectively load data into PeopleSoft from legacy systems
- Rapidly bulk-load assigned security permissions for entire population of users

**Smart Lifecycle Viewer™**

Where’s my document? With Smart Lifecycle Viewer you will never have to guess again! The Smart Lifecycle Viewer solution graphically shows the status of any PeopleSoft document (requisitions, POs, students, new hires, etc.), as well as all related supporting documents, via an intuitive, easy-to-use interface with intelligent drill-down or drill-up capabilities built in. You can instantly see that your PO has been received in two shipments and the invoices have been paid with three vouchers. View a student’s classes, tuition payments and outstanding fees. Or determine that your customer’s order has been shipped and the bill is being prepared. The possibilities are limitless with the Smart Lifecycle Viewer Wizard that allows you to tailor views to meet your unique business needs.

Smart Lifecycle Viewer uses the latest PeopleSoft technology to present users with graphically rich icons that show the current status of PeopleSoft documents, as well as quick links to any related supporting documents, increasing everyone’s productivity by reducing clicks. The Viewer can be used with any PeopleSoft 8.x release that is on PeopleTools 8.48 or greater and is highly configurable to fit any organization’s requirements.

### Smart 1099™

PeopleSoft applications have a very robust 1099M reporting solution that includes Copy B printing, IRS flat file generation and automatic correction capability. Many customers have expressed the desire to extend this functionality to areas not presently covered in the standard PeopleSoft product. These areas surround importing 1099 information from external sources, adding the totals to the standard AP totals, and reporting to the IRS on the combined totals. Smart 1099 allows you to import data from any external source, automatically create 1099 vendors and combine the interface totals to existing PeopleSoft totals, and create consolidated 1099 reports for the vendor and the IRS. Smart 1099 comes with pre-configured procurement card and single payment voucher interfaces, and can be easily configured for importing from any external source.

#### Key Features of Smart 1099 include:

- Tax reporting capability for single payment vendors
- Tax reporting capability for procurement card (p-card) payments
- Tax reporting capability for external invoices created for vendors not already in PeopleSoft

### International Tax Navigator® (Windstar) and PeopleSoft AP Interface (1042 forms):

Non-Resident Alien (NRA) tax compliance for payments made from PeopleSoft Financials Accounts Payable (AP) module is complicated and can be manually intensive. In association with Windstar Technologies, SmartERP makes NRA tax compliance easier than ever! SmartERP is the provider of the *International Tax Navigator* and PeopleSoft Financials AP Interface.

#### Key Features of this interface solution include:

- Financial functions that automatically update to reflect changes in tax withholding status from the Tax Navigator, preventing ineligible foreign entities from receiving tax exemptions
- Streamlined reconciliation between Tax Navigator and PeopleSoft AP
- Elimination of potential compliance inaccuracies due to manual data entry in the AP module
- Interfaces include demographics, immigration history for all statuses, and payment data

In addition, the interface leverages important functions of the International Tax Navigator, including:

- Tax residency determinations — Substantial Presence Test automatically determines U.S. tax residency status under the substantial presence test
- Visa (immigration status) changes
- Handle any possible number of immigration status adjustments in any calendar year — current, past, or future — and automatically determine the correct tax residency status
- History of tax residency status and analysis
- A detailed status report of residency determinations is archived and retrievable at any time
- IRS Forms 1042 and 1042-S capabilities for compliance with IRS regulations, including electronic submission

International Tax Navigator and the corresponding PeopleSoft AP Interface are available separately from Windstar Technologies ([www.windstar.com](http://www.windstar.com)).

### Smart Diversity Reporting™

As encouraged by the Federal and many state governments, a supplier diversity program is important for any organization to ensure that women, minority, and disabled veteran-owned business enterprises are provided the maximum practicable opportunity. However, beyond tracking a few suppliers, complying with a supplier diversity program can be an arduous, manually intensive, and time-consuming task. Smart Diversity Reporting automates this process, greatly enabling organizations to benefit more efficiently from their supplier diversity programs.

#### Key Features of Smart Diversity Reporting include:

- Gives your organization a competitive advantage through supplier diversity
- Allows for better supplier diversity related purchasing decisions
- Promotes business opportunities for diverse businesses
- Generates various supplier diversity expenditure reports
- Automatically syncs the suppliers in the system with agency published lists
- Supports all feed file types (CSV, XML, EXCEL), leveraging Smart Loader capabilities to automate data transfers

Online demo is available at:

[www.smarterpsolutions.com/supplierdiversity.php](http://www.smarterpsolutions.com/supplierdiversity.php)



## CONTACT US

To receive more information on these solutions, or to ask about co-developing our next solution with your organization, please contact us directly or through your services provider.

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