

Client Success Story: Security for Cash Management



SmartERP enhances PeopleSoft Financials processes for the State of Delaware, providing row level security while reducing costs and accelerating project timelines.

State of Delaware's Goal

The Department of Finance at the State of Delaware approached SmartERP with the significant goal of enhancing their PeopleSoft Financials with increased security features spanning Data Entry and Inquiry pages, including:

- Security at the Department level to enforce confidentiality and privacy in Cash Management
- Security scope that spanned data entry pages, access to reports, inquiries, and queries
- Security settings that are dynamic, enabling different application areas to have different security contexts
- Extensibility—to readily accommodate future security needs

Challenges

- Securing data at the Department Level was unavailable in standard PeopleSoft
- Having consultants pursue one-off customizations was untenable due to development and ongoing maintenance costs
- Standard functionality only provided for static security, applied equally across the entire system—essentially one context for all users across all areas

Smart Solutions: Benefits

SmartERP's pre-built, proven, configurable, Smart Security™ solution and implementation methodologies accelerated the project, delivering robust Security functionality, addressing challenges and meeting client goals while also avoiding difficult-to-maintain customizations.

The efficiencies of Smart Security were applied to the State of Delaware's system providing the following benefits and features:

- Each user could now only access Bank Accounts for which they had direct responsibility
- Project timelines were accelerated, with reductions in development costs as well as ongoing maintenance costs
- Row Level Security that leverages standard PeopleSoft security such as User, Role, Permission List and Row Security Class features
- One-click on/off security configurations to facilitate development, testing and maintenance
- Modular architecture to readily facilitate future patches, updates and upgrades
- Dynamic Security that can applied to any field, on any page--for any PeopleSoft application/module/release

Smart ERP Solutions at State of Delaware:

The Delaware Department of Finance's mission is to provide leadership in securing, creating, allocating and managing financial resources critical to the delivery of governmental services and promotion of Delaware's economic health.

PeopleSoft Environment:

- HCM 8.8
- Financials 8.9

The State of Delaware chose Smart Security™ by SmartERP to enhance their PeopleSoft Financials to enforce privacy and confidentiality for their Cash Management module. Smart Security was applied to restrict users' access to only those bank accounts for which they have deposit/reconciliation responsibility.

"We are very impressed with the Security bolt-on and your ability to deliver what was promised, on budget, and ahead of schedule. You've put together a talented group of PeopleSoft professionals. I look forward to continuing our business relationship through the implementation of Smart Workflow"

Reese Robinson

State Functional Lead
State of Delaware, Dept of Finance



About SmartERP: Comprised of former Oracle/PeopleSoft architects, analysts and executives, SmartERP provides innovative add-on solutions for Oracle/PeopleSoft applications as an alternative to more costly and difficult-to-maintain customizations.



To achieve similar efficiencies in your PeopleSoft please contact us at
smarterp.com, info@smarterp.com,
925-271-0200