SUBMIT OFFER TO: PURCHASING DEPARTMENT UNIVERSITY OF CENTRAL FLORIDA 12479 RESEARCH PARKWAY, BLDG. 600 ORLANDO, FL 32826 Phone:(407) 823-2661 – Fax (407) 823-5551 www.purchasing.ucf.edu	**University of Central Florida** **INVITATION TO NEGOTIATE** **Contractual Services Acknowledgement Form**

Page 1 of 32 Pages	OFFERS WILL BE OPENED **June 3, 2014** and may not be withdrawn within ___ days after such date and time.	ITN NO: **1325JCSA**

UNIVERSITY MAILING DATE: **May 1, 2014**	ITN TITLE: **ERP Consulting Services for Implementation and Upgrades for PeopleSoft Applications, PeopleTools and Oracle Software and Hardware**

FEDERAL EMPLOYER IDENTIFICATION NUMBER OR S.S. NUMBER
59-3520825

VENDOR NAME **Employer Management Solutions, Inc. DBA EMS Consulting**	REASON FOR NO OFFER
VENDOR MAILING ADDRESS **5550 W. Executive Drive, Suite 450**	

CITY - STATE - ZIP CODE **Tampa, FL 33609**	**P O S T I N G O F P R O P O S A L T A B U L A T I O N S**
AREA CODE **813** TELEPHONE NO. **287-2486**	Proposal tabulations with intended award(s) will be posted for review by interested parties at the Purchasing Department, our solicitation web page and the State of Florida's Vendor Bid System and will remain posted for a period of 72 hours. Failure to file a protest within the time prescribed in UCF Regulation 7.130(5) at http://regulations.ucf.edu/chapter7/index.html shall constitute a waiver of proceedings under that regulation.
TOLL FREE NO.	
FAX NO. **813-286-9564**	

Government Classifications
Check all applicable

- ☐ **African American**
- ☐ **Asian-Hawaiian**
- ☐ **Hispanic**
- ☐ **Native American**
- ☐ **Non-Profit Organization**
- ☐ **Small Business Federal**

- X **American Women**
- ☐ **Government Agency**
- ☐ **MBE Federal**
- ☐ **Non-Minority**
- ☐ **Pride**
- ☐ **Small Business State**

must submit a "NO OFFER," and it must be received no later than the stated offer opening date and hour.

GENERAL CONDITIONS

1. SEALED OFFERS: All offer sheets and this form must be executed and submitted in a sealed envelope. (DO NOT INCLUDE MORE THAN ONE OFFER PER ENVELOPE.) The face of the envelope shall contain, in addition to the above address, the date, and time of the solicitation opening and the solicitation number. Offer prices not submitted on any attached price sheets when required shall be rejected. All offers are subject to the terms and conditions specified herein. Those which do not comply with these terms and conditions are either automatically rejected with respect to non-compliance with non-negotiable terms and conditions or may be rejected, at UCF's sole discretion, with respect to any other terms and conditions.

2. EXECUTION OF OFFERS: Offers must contain a manual signature of authorized representative in the space provided above. Offers must be typed or printed in ink. Use of erasable ink is not permitted. All corrections to prices made by vendor must be initialed. The company name and F.E.I.D. or social security number must appear on each pricing page of the proposal as required.

3. NO OFFER SUBMITTED: If not submitting an offer, respond by returning only this offer acknowledgment form, marking it "NO OFFER," and explain the reason in the space provided above. Failure to respond without justification may be cause for removal of the company's name from the solicitation mailing list. NOTE: To qualify as a respondent, vendor

_____
AUTHORIZED SIGNATURE (MANUAL)

_____
Angie May, Vice President of Administration
AUTHORIZED SIGNATURE (TYPED), TITLE

4.   PRICES, TERMS AND PAYMENT: Firm prices shall be negotiated and include all services rendered to the purchaser.

(a)   DISCOUNTS: Cash discount for prompt payment shall not be considered in determining the lowest net cost for offer evaluation purposes.

(b)   MISTAKES: Offerers are expected to examine the conditions, scope of work, offer prices, extensions, and all instructions pertaining to the services involved. Failure to do so will be at the offerer's risk.

(c)   INVOICING AND PAYMENT: All vendors must have on file a properly executed W-9 form with their Federal Employer Identification Number prior to payment processing.

Vendors shall submit properly certified original invoices to:

> Finance & Accounting
> 12424 Research Parkway, Suite 300
> Orlando, Florida 32726-3249

Invoices for payment shall be submitted in sufficient detail for a proper pre-audit and post audit. Prices on the invoices shall be in accordance with the price stipulated in the contract at the time the order is placed.   Invoices shall reference the applicable contract and/or purchase order numbers. Invoices for any travel expenses shall be submitted in accordance with the State of Florida travel rates at or below those specified in Section 112.061, Florida Statutes and applicable UCF policies. Travel Reimbursement must be made using the UCF Voucher for Reimbursement of Traveling Expenses available on the web at http://www.fa.ucf.edu/forms/forms.cfm#.

Final payment shall not be made until after the contract is complete unless the University has agreed otherwise.

Interest Penalties: Vendor interest penalty payment requests will be reviewed by the UCF ombudsman whose decision will be final.

Vendor Ombudsman: A vendor ombudsman position has been established within the Division of Finance & Accounting. It is the duty of this individual to act as an advocate for vendors who may be experiencing problems in obtaining timely payments(s) from the University of Central Florida.   The Vendor Ombudsman can be contacted at (407) 882-1040; or by mail at the address in paragraph 4, (c) above.

The ombudsman shall review the circumstances surrounding non-payment to:

*   determine if an interest payment amount is due;
*   calculate the amount of the payment; and
*   ensure timely processing and submission of the payment request in accordance with University policy.

University of Central Florida

IMPORTANT DOCUMENT – INVITATION TO NEGOTIATE REVISION

ITN NUMBER: **1325JCSA**   OPENING DATE & TIME: **June 3, 2014 @ 2:00 p.m.**

ITN TITLE: **ERP Consulting Services for Implementation and Upgrades PeopleSoft Applications, PeopleTools and Oracle Software**

ADDENDUM NUMBER: **1**   ADDENDUM DATE: **May 20, 2014**

The purpose of this addendum is to answer questions submitted by vendors.
See below addendum continuation sheet.

PLEASE ACKNOWLEDGE RECEIPT OF THIS ADDENDUM BY SIGNING AND RETURNING IT, AND ALL OTHER REQUIREMENTS WITH YOUR PROPOSAL. FAILURE TO SIGN AND RETURN WITH YOUR PROPOSAL COULD RESULT IN REJECTION OF YOUR PROPOSAL.

PROPOSERS SIGNATURE

Angie May, Vice President of Administration
PRINT OR TYPE PROPOSER'S NAME

Employer Management Solutions, Inc DBA EMS Consulting   amay@consultems.com
COMPANY NAME   EMAIL ADDRESS

6-2-2014
DATE

APPENDIX II SUPPLEMENTAL
OFFER SHEET TERMS AND
CONDITIONS

The sections set forth below must each be initialed, as YES for "understood and agreed upon" or NO for "not agreed to." Failure to complete and return this document with your offer could result in rejection of your offer, at UCF's sole discretion. Respondents shall not check sections as "understood and agreed upon" with the intent to negotiate a change to those sections/terms and conditions after tentative award of a contract resulting from this ITN. Respondents disagreeing with any term or condition of this ITN shall act to resolve the difference prior to the deadline for inquires, as noted in this ITN. A Respondent's disagreement with any non-negotiable section of this ITN shall be automatically rejected. Failure of the university and the tentative awardee to come to an agreement with respect to terms and conditions within a time frame UCF determines to be reasonable constitutes grounds for rejection of that offer and the University shall have the right, at its sole discretion, to award the contract to the next favorable respondent.

SECTION	YES	NO	RESPONDENT INITIALS
2.1 **Non-negotiable**	✓		am
2.2 **Non-negotiable**	___	___	
2.3 **Non-negotiable**	___	___	___
2.4	___	___	___
2.5	___	___	___
2.6 **Non-negotiable**	___	___	___
2.7 Section Not Used			
2.8 **Non-negotiable**	___	___	___
2.9	___	___	___
2.10	___	___	___
2.11 **Non-negotiable**	___	___	___
2.12	___	___	___
2.13**Non-negotiable**	___	___	___
2.14**Non-negotiable**	___	___	___
2.15	___	___	

SECTION	YES	NO	RESPONDENT INITIALS
2.16	✓		am
2.17			
2.18 **Non-negotiable**			
2.19			
2.20 **Non-negotiable**			
2.21			
2.22			
2.23			
2.24			
2.25			
2.26			
2.27**Non-negotiable**			
2.28			
2.29			
2.30**Non-negotiable**			
2.31**Non-negotiable**			
2.32			
2.33			
2.34			
2.35**Non-negotiable**			
2.36			
2.37			
2.38			

SECTION	YES	NO	RESPONDENT INITIALS
2.39 **Non-negotiable**	✓		am
2.40			
2.41			
2.42 **Non-negotiable**			
2.43			
2.44			
2.45			
2.46			
2.47			
2.48			
2.49 **Non-negotiable**			
2.50			
3.0			
4.0			

RESPONDENT COMPANY NAME Employer Management Solutions, Inc. DBA EMS Consulting

AUTHORIZED SIGNATURE *Angie May*

TITLE Angie May, Vice President of Administration

DATE 6-2-2014

APPENDIX III

CERTIFICATE OF NON-SEGREGATED FACILITIES

We, **Employer Management Solutions, Inc. DBA EMS Consulting** certify to the University of Central Florida that we do not and will not maintain or provide for our employees any segregated facilities at any of our establishments, and that we do not and will not permit our employees to perform their services, under our control, where segregated facilities are maintained. We understand and agree that a breach of this certification is a violation of the Equal Opportunity clause required by Executive order 11246 of 24 September 1965.

As used in this certification, the term "segregated facilities" means any waiting rooms, work areas, rest rooms and wash room, restaurants and other eating areas, time clocks, locker rooms and other storage or dressing areas, parking lots, drinking fountains, recreation or entertainment areas, transportation and housing facilities provided for employees which are segregated by explicit directive or are in fact segregated on the basis of race, creed, color or national origin, because of habit, local custom or otherwise.

We, further, agree that (except where we have obtained identical certifications from offered subcontractors for specific time periods) we will obtain identical certifications from offered subcontractors prior to the award of subcontracts exceeding $10,000 which are not exempt from the provisions of the Equal Opportunity Clause; that we will retain such certification in our files; and that we will forward the following notice to such offered subcontractors (except where the offered subcontractors have submitted certifications for specific time periods):

NOTE TO PROSPECTIVE SUBCONTRACTORS OR REQUIREMENTS FOR CERTIFICATIONS OF NON-SEGREGATED FACILITIES. A Certificate of Non-segregated Facilities, as required by the 9 May 1967 order on Elimination of Segregated Facilities, by the Secretary of Labor (32 Fed. Reg. 7439, 19 May 1967), must be submitted prior to the award of a sub-contract exceeding $10,000 which is not exempt from the provisions of the Equal Opportunity clause. The certification may be submitted either for each sub-contract or for all subcontracts during a period (i.e. quarterly, semiannually, or annually).

NOTE: Whoever knowingly and willfully makes any false, fictitious, or fraudulent representation may be liable to criminal prosecution under 18 U.S.C. 1001.

APPENDIX III

CERTIFICATE OF NON-SEGREGATED FACILITIES
SUBPART - CONTRACTOR'S AGREEMENTS

SEC. 202. Except in contracts exempted in accordance with Section 204 of this Order, all Government contracting agencies shall include in every Government contract hereafter entered into the following provisions:

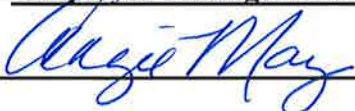During the performance of this contract, the contractor agrees as follows:

(1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, or national origin. Such action shall include, but not be limited to the following: employment, upgrading demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of this nondiscrimination clause.

(2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex or national origin.

(3) The contractor will send to each labor union or representative of workers with which the contractor has a collective bargaining agreement or other contract or understanding, a notice, to be provided by the agency contracting officer, advising the labor union or worker's representative of the contractor's commitments under Section 202 of Executive Order No. 11246 of September 24, 1965, and shall post copies of notice in conspicuous places available to employees and applicants for employment.

(4) The contractor will comply with all provisions of Executive Order No. 11246 of September 24, 1965 and of the rules, regulations, and relevant orders of the Secretary of Labor.

(5) The contractor will furnish all information and reports required by Executive Order No. 11246 of September 24, 1965, and by the rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the contracting agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations and orders.

(6) In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of such rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts in accordance with procedures authorized in Executive Order No. 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoiced as provided in Executive Order No. 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

(7) The contractor will include the provision of Paragraphs (1) through (7) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to Section 204 of Executive Order No. 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or

purchase orders the contracting agency may direct as a means of enforcing such provisions including sanctions for noncompliance. Provided, however, that in the event the contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the contracting agency, the contractor may request the United States to enter into such litigation to protect the interest of the United States.

SEC. 402 Affirmative Action for Disabled Veterans and Veterans of the Vietnam Era:

(1) The contractor agrees to comply with the affirmative action clause and regulation published by the US Department of Labor implementing Section 402 of the Vietnam Era Veteran's Readjustment Assistance Act of 1974, as amended, and Executive Order 11701, which are incorporated in this certificate by reference.

RESPONDENT COMPANY NAME Employer Management Solutions, Inc. DBA EMS Consulting

AUTHORIZED SIGNATURE _Angie May_

TITLE Angie May, Vice President of Administration

DATE 62-2014

APPENDIX IV

COMPLIANCE AND CERTIFICATION OF
GOOD STANDINGS

The parties shall at all times comply with all applicable ordinances, laws, rules and regulations of local, state and federal governments, or any political subdivision or agency, or authority or commission thereof, which may have jurisdiction to pass laws, ordinances, or make and enforce rules and regulations with respect to the parties.

Vendors shall certify below that they are in good standings to conduct business in the State of Florida. **The awardee of any contract resulting from this solicitation shall forward a certification of good standing.** The certifications must be submitted to the UCF Purchasing Department prior to providing any goods or services required under the resulting contract.** Noncompliance with this provision may constitute rejection of proposal or termination of a contract at UCF's sole discretion.

CERTIFICATION

I certify that the company submitting an offer under this solicitation in is compliance with all applicable laws to conduct business in the State of Florida is in good standings and will provide a certificate of good standings from the State of residence prior to initiating any performance under any contract resulting from this solicitation.

Company: __**Employer Management Solutions, Inc. DBA EMS Consulting**__

Authorized Representative's Name: __**Angie May, Vice President of Administration**__

Authorized Representative's Signature: _____*Angie May*_____

Date: __6-2-2014__

University of Central Florida
ITN No: 1325JCSA
ERP Consulting Services for Implementation and Upgrades for PeopleSoft Applications, PeopleTools, and Oracle Software and Hardware

Due June 3, 2014 | Draft

Contents

3.2 Respondent/Offer Submittal Sections

A. Experience and Qualifications in any of the following PeopleSoft applications: Campus Solutions, Human Capital Management, Financials, CRM, Interaction Hub, Mobile, Database Administration, Systems Administration.
3.2 A. #1. Please provide an overview and history of your company, and experience in providing consulting and advisory services similar in scope to those requested in section 1.1.

Executive Summary

Established in 1998, EMS-IC is a Florida corporation, headquartered at 5550 West Executive Drive, Suite 450, Tampa, Florida, 33609. EMS-IC is a certified Woman Business Enterprise whose President/CEO is Elaine C. Myrback.

As a Certified Oracle Partner, EMS-IC recognized early on the unique needs of the Higher Education market. Understanding the diverse needs of higher education, especially in regard to Oracle's ERP applications, EMS-IC began to develop a dedicated Higher Education practice in 1998, and with this focus, has previously worked with over 95 public and private Universities in the US. EMS-IC serves over 35% of the largest universities across the country as clients. Our Higher Education practice is dedicated solely to projects within the University realm and is staffed with functional and technical consultants who bring significant experience in working for a wide-range of higher education clients.

Intelligent Chaos was born as the natural extension of EMS Consulting, focused on implementing solutions utilizing the Oracle technology stack. This practice brings the next generation of services to clients, assisting them with transitioning to the next step in their ERP evolution, helping organizations streamline, enable, accelerate and evolve their capabilities.

We Understand Higher Education – 15 years ERP

We understand the daily challenges that occur in many institutions. EMS-IC's Higher Education practice includes a professional staff that has extensive experience   in every aspect of the University from Student Information Systems to Grants   Management, from Financials to Human Capital Management. We have staff that is skilled in the on-going support of a variety of applications used by Universities, as   well as many who are skilled in addressing the business process issues encountered   across the entire enterprise. EMS' services over 35% of the largest universities   nationwide.

Award Winning Service Oriented Architecture (SOA) 8 years

Intelligent Chaos (IC) specializes in a Business Transformation focused approach the implementation of Service Oriented Architecture based solutions.

We are experts in assisting organizations build business solutions on Oracle's SOA Suite platform, as well as other market-leading middleware platforms. EMS has developed Oracle Innovation award-winning solutions utilizing SOA with Northwestern   University (2007), West Virginia University (2009), and the University of Virginia   (2010).

Delivering transformational Oracle applications forms a part of Intelligent Chaos'   unique Fusion Middleware SOA business-centric approach. IC specializes in laying the foundation for

migration to an SOA platform built on Oracle's SOA Suite Fusion Middleware. IC enhances existing Oracle applications from a business service perspective, utilizing web services. The firm's SOA specialists have strong knowledge of all of the component technologies in the SOA Suite from the Oracle Service Bus (OSB) to BPEL, from Business Rules to Web Services Manager using Oracle SOA Suite or WebLogic Suite.

We Understand Identity Management (IdM)

Intelligent Chaos (IC) specializes in the management of identities as a business matter, as opposed to an Information technology problem. We have a unique position in the identity management marketplace, having successfully carried out and supported multiple identity management implementations for major organizations across a variety of industries.

Our unique approach is aimed towards understanding your identity-related business processes first, and exploring the appropriate technologies later. Our experts are knowledgeable in the latest Identity Management technologies and can effectively apply these technologies to solve business problems, providing clients with balanced consultation and delivery services.

We Are Known For Our Mentoring - Collaborative 'Partnership Experience'

EMS Consulting – Intelligent Chaos is known for its collaborative 'Partnership Experience'. Rather than tell our clients what to do, we always view our role as an engaged mentor. Our experts are national in geography and specialize in various technologies to help you meet your goals and objectives. Your partnership with EMS-IC is about our commitment to your success; it's about how we will work together as a team to achieve every one of your goals.

EMS-IC won't only act as your mentor, but will work jointly with you to create value, build on your successes, and align your core values with ours. This approach will allow you to implement your strategic agenda, as our industry experts will be there to assist you in accomplishing the tasks at hand.

Consultant Management Policies

EMS-IC has extensive experience implementing projects based on Oracle's E- Business Applications, Identity Management, Oracle Business Intelligence, WebCenter and SOA Suite, both from a staff augmentation resource perspective and from a project level perspective. We have led numerous engagements and assisted clients both in the strategic and tactical choices necessary for the successful deployment of integration solutions and projects.

Our consultants have an average of 15 years of experience in technology consulting within the higher education industry. EMS-IC specifically recruits consultants with Higher Education experience: We hire former higher education associates that have industry depth and experience. Over 50% of our consultants at EMS-IC came from the higher education industry.

Additionally, our PeopleSoft consultants have a minimum of 10 years PeopleSoft application experience with an average of 10-12 project based implementations. EMS offers both full life cycle project based services in addition to staff augmentation for PeopleSoft Solutions to UCF.

On-Going Training for EMS-IC Consultants
The continual training requirement and commitment shown by EMS-IC senior management ensures that training is a must to keep up with the newer versions of application and technical stack of Oracle products. Our consultants are allowed three weeks training annually to enhance their knowledge and experience through Oracle University. All of EMS' consultants are encouraged to continue their education and expand their expertise   for their area of specialty. Over 50% of our consultants have held Oracle certifications and continue to educate themselves with the latest of applications   changes and approaches.

As an Oracle Platinum partner, EMS-IC has access to Oracles development senior management and Oracle university training to continually update our consultants and their Oracle expertise both individually and at the firm level.

EMS-IC provides employees with the latest facts, databases of intellectual property, modules, and upgrade details on EBS and the Oracle technology stack. Training is a continual process for the EMS-IC consulting staff.

3.2 A. #2. The proposer shall provide a list of current or recent similar-type client accounts, if any, which are located in the United States. Client account information shall include contact name, address, phone number, email address and length of service.

Clients

EMS can count over 30% of the US university market as clients and has accomplished over 125 implementations and upgrades over the last 10 years. A sampling of our clients with details includes the following institutions:

Table 1: Sample Clients with Details - HCM, FMS and CS Implementations

INSTITUTION	TYPE	SCOPE	ROLE
North Carolina State	Implementation Services	Student Information	Co-Implementation Partner
Cornell University	Implementation Services	Student Information	Co-Implementation Partner
University North Dakota System	Upgrade Services	Financial Management	Co-Implementation Partner
Kansas State University	Implementation Services	Student Information	Co-Implementation Partner
Cincinnati Children's Hospital	Upgrade Services	Human Resources	Implementation Partner

Corinthian Colleges	Implementation Services	Student Information	Co-Implementation and Production
Wake Forest Baptist - School of Medicine	Upgrade Services	Financial Management	Implementation Partner
George Washington University	Implementation Services	Oracle Financials/SEVIS	Implementation Partner
Miami Dade Aviation Dept	Upgrade Services	Financial Management	Co-Implementation Partner
Emory University	Upgrade Services	Human Resources Student	Co-Implementation
University of Southern Mississippi	Upgrade Services	Student Information	Implementation Partner
University of Florida	Implementation Services	Financial Management	Co-Implementation Partner

Other Universities with Oracle/PeopleSoft applications that EMS has provided services for include:

- Indiana University
- Emory University
- University of Akron
- University of Central Florida
- Open University of Hong Kong
- Maryland Inst/College of Arts
- Virginia Community College Sys
- College of Lake County
- Loyola University-Chicago
- Madison Area Technical College
- Northwestern University
- Salisbury University
- Towson State University
- University of South Florida
- West Chester University
- Baylor University
- Clemson University
- Syracuse University
- University of Maryland - University College
- Grand Rapids Community College
- Long Island University
- Art Institute of San Francisco
- SUNY Foundation
- Boston College
- University of Vermont
- University of Michigan
- Catholic University
- University of Texas - MD Anderson
- University of Maine
- University of Delaware
- University of Minnesota
- University of Mass-Lowell
- University of Ala-Birmingham
- Gallaudet University
- Howard University
- Kansas University Medical Center
- PolyTechnic University
- WILM
- New York University
- University of Texas- Pan American

References

EMS-IC has provided the following references as representative examples of our experience supporting customers with Oracle applications and technology.

CLIENT	CONTACT	SERVICES
The University of North Dakota Grand Forks, ND 58202	Mr. Mick Pytlik PeopleSoft Project Director Phone: 701–231-8119 Mick_Pytlik@ndus.edu	PeopleSoft Campus Solutions v8.0 to v9.0 Upgrade PeopleSoft HCM Troubleshooting v9.0 PeopleSoft Financials (Grants) v8.4 to v9.0 Upgrade
Kansas State University Manhattan, KS 66506	Ms. Jennifer Gehrt PeopleSoft Project Manager Phone: 785-532 1886 jgehrt@ksu.edu	PeopleSoft Campus Solutions v8.9 Implementation PeopleSoft Campus Solutions v8.9 > 9.0 Upgrade Fit/Gap Analysis
North Carolina State University Raleigh, NC 27695	Ms. Gwen Hazlehurst Director of Enterprise Information Phone: 919-513-0009 gwen.hazlehurst@ncsu.edu	PeopleSoft Campus Solutions v8.9 Implementation
Florida State University 600 W. College Avenue, Tallahassee, FL 32306	Mr. Randy McCausland Director of Applications and Technology 850.645.2129 rmmccausland@admin.fsu.edu	Oracle Identity Management (OIM) Implementation Oracle Access Manager (OAM) Implementation Oracle Virtual Directory (OVD) Implementation SOA/MDM
Harvard University 1350 Mass Ave Cambridge, MA 02138	Jordan Harris 617-680-9595 jordanharris@verizon.net	SUN Identity Management(SUN IDM) Assessment, Roadmap and Conversion Plan OIM
Cincinnati Children's Hospital 3333 Burnet Avenue, Cincinnati, Ohio	Mrs. Robin Felty PeopleSoft Project Manager Phone: 513 636 9699 Robin.Felty@cchmc.org	PeopleSoft HCM v8.3 to v8.9 Upgrade PeopleSoft ELM v8.9 to 9.0 Upgrade PeopleSoft HCM (MSS/ESS) 8.9 to 9.0 Upgrade
Grand Rapids Community College 143 Bostwick Avenue, NE Grand Rapids, Michigan 49503	Mrs. Peggy Gorno PeopleSoft Project Manager Phone: 616-234-4722 pgorno@grcc.edu	PeopleSoft Campus Solutions v8.0 to v9.0 Upgrade

1.) University of Miami

1. Address: Coral Gables, Florida 33124
2. Contact: Ms. Lindsay George – Director of Information Services
3. Telephone: 305-284-5140
4. Services: SOA Installation, Workflow, BPM, OBIE
5. Email: lboatner@miami.edu
6. Date providing services: 2013- current

2.) *Florida International University*

1. Address: 11200 SW 8th Street Miami, FL 33199
2. Contact: Larisa Goldberg
3. Telephone: 305 348 0350
4. Services: PeopleSoft Financials Upgrade 9.0 - 9.2
5. Email: larisa.goldberg@fiu.edu
6. Date providing services: 2009 - Present

3.) *Miami Dade Aviation*

1. Address: 4200 NW 36th Street Miami, FL 33122
2. Contact: Carlos Garcia, Computer Services Sr. Manager
3. Telephone: 305-876-0878
4. Services: PeopleSoft Consulting Services
5. Email: cgarcia@miami-airport.com
6. Date providing services: 2006 - Present

4.) *Tuition Management Systems*

1. Address: 171 Service Ave. Suite 200, Warwick, RI 02886
2. Contact: Mark Carney- VP of Professional Services
3. Telephone: 401.921.3838
4. Services: Ellucian Banner and PeopleSoft Support
5. Email: mcarney@afford.com
6. Date Providing Services: 2007-2014

3.2 A. #3. Please provide a list of client accounts lost through early termination or non-renewal over the past five (5) years. Include contact name, phone number, email address and length of service for each account, and reason for loss.

EMS Consulting has not lost any accounts due to early termination or non-renewal over the past five years.

3.2 A. #4 The Proposer shall provide a chart of the company's organization and a description of its corporate structure and chain of ownership of company to ultimate parent corporation, and all subsidiaries.

An organization chart is included at the back of this document. EMS Consulting is owned by the CEO & President, Elaine C. Myrback and is a nationally recognized woman owned business enterprise.

3.2 A. #5 Provide the number of years' experience in providing services as described in section 1.1.
 EMS Consulting has been providing staff augmentation and project resources for PeopleSoft implementations for over 15 years.

B. Services Offered
3.2. B. #1 List the total number of employees, include job titles and experience of individual(s) who would be available to the UCF account; please include resume(s).

Resumes of individuals proposed to fulfill the needs of this ITN are included in the following pages.

3.2. B. #2 Clearly identify the skill sets your staff is capable of providing, and clearly indicate if subcontractors or sub-consultants will be used.
EMS Consulting does not intend to partner with a subcontractor for consulting service resources. Skillsets are listed within the pricing table and each individuals resume.

Sample Resumes

Please see attached sample resumes for your convenience.

W. Curtis Welsh
PeopleSoft Campus Solutions Consultant

Summary:
Curtis Welsh is a Senior, team-oriented professional, specializing in the Student Financials module of PeopleSoft Campus Solutions with additional functional experience in Financial Aid for Canadian institutions. He has twenty (20) years of PeopleSoft Campus Solutions experience. He started his career out as the Director of Student Financial Services, and then began a successful consulting career within PeopleSoft Student Financials. Most recently Curtis was given an opportunity to work with Financial Aid for Canadian Institutions, and has had four (4) years of experience within Financial Aid, and the Registrars office. He has been recognized for his exceptional communication skills with his clients, developers, and other team members, and is highly regarded by his clients and peers.

Professional Experience:
McMaster University, Hamilton, ON   **Nov. 2012 to Present**
PeopleSoft 9.0 Financial Aid Lead Consultant, Implementation
  - ➢ Presently serving as the Financial Aid lead for a new Campus Solutions implementation. The scope of the project includes the design of bolt-on components to manage the Ontario Student Aid Program, online aid applications and work study as well as utilizing delivered functionality to administer the financial aid needs of a major university including a large undergraduate population plus extensive graduate, professional, research and medical schools.

University of Montreal, Montreal, QC   **March 2012 – Nov. 2012**
PeopleSoft 9.0 Financial Aid Lead Consultant, Implementation
  - ➢ Led the Financial Aid implementation utilizing delivered PS functionality to administer institutional and external aid to students. Interfaced PS data to an institutionally developed system to facilitate Quebec specific award evaluation and reporting. Also supported the Student Financials lead on various implementation tasks.

University of Alberta, Edmonton, AB   **Nov. 2010 – Dec. 2011**
PeopleSoft 9.0 Student Financials/Financial Aid Lead Consultant, Multiple Projects
PeopleSoft Non-Credit Web Registration Bolt-on
  - ➢ Led the Student Financials portion and assisted with all other PS modules in the implementation of the new Oracle Non-Credit Web Registration product for the Faculty of Extension. Analyzed business processes and developed functional requirements to adapt delivered functionality to the University's custom self-service portal. Integrated the web registration system with a Hosted Pay Page solution to provide real-time PCI secure payment processing.

Hosted Pay Page Integration
  - ➢ Designed a Hosted Pay Page solution integrated with the University's credit/debit card service vendor to facilitate real-time online payment transactions for Undergraduate and Graduate tuition and fee payments.

Tuition Calculation
  - ➢ Analyzed existing business processes related to tuition calculation to streamline process flow and resolve charge/payment priority issues.

Grant MacEwan University, Edmonton, AB   **Feb. 2010 – May 2010**
PeopleSoft 9.0 Student Financials Lead Consultant, Implementation
  - ➢ Led the Student Financials portion of the first phase of a multi-phase implementation including fit/gap and scope definition. Analyzed the existing business with an eye toward process change and a near-vanilla configuration.

Lorain County Community College, Elyria, OH   **Jan. 2009 – Feb. 2010**
PeopleSoft 9.0 Student Financials Lead Consultant, Implementation
  ➢ Led the Student Financials portion of a "vanilla" implementation intended to be a model
    for a shared services, rapid implementation plan for Ohio community colleges. Unique
    challenges included replacing an old system that relied extensively on non-system
    workarounds for day-to-day business needs, and losing the primary functional resource
    half way through the project. With the exception of custom reports, we were able to not
    only successfully replace the old system with delivered PeopleSoft functionality, but to
    also replace the non-system workarounds.

University of Alberta, Edmonton, AB   **Feb. 2008 – Nov. 2008**
PeopleSoft 9.0 Financial Aid Lead Consultant, Upgrade
  ➢ Guided the upgrade of a highly customized Financial Aid module from 8.0 to 9.0. Since
    the original implementation was hastily done and largely unusable, the upgrade required
    a virtual redesign of many customizations, and reconfiguration of several delivered
    components. Additionally, analyzed the client's existing business processes and provided
    a roadmap recommending post upgrade implementation of both delivered and customized
    functionality to truly meet the needs of the Student Awards Office.

University of Connecticut, Storrs, CT   **Dec. 2007 – Jan. 2008**
PeopleSoft 9.0 Student Financials Lead Consultant, Upgrade
  ➢ Led Student Financials delta sessions to identify new and changed functionality for
    upgrade from 8.0 to 9.0. Researched options to eliminate or modify existing
    modifications using delivered functionality.

North Dakota University System, Grand Forks, ND   **Aug. 2007 – Oct. 2007**
PeopleSoft 8 Student Financials Consultant, 9.0 Upgrade
  ➢ Provided Student Financials production support for 11 colleges in a multi-institution,
    multi-business unit environment. Also researched 9.0 functionality and developed
    comparison tools in preparation for an upgrade to 9.0.

Capella University, Minneapolis, MN   **May 2007 – July 2007**
PeopleSoft 8 Student Financials Consultant, Collections
  ➢ Led client team in converting an entirely manual legacy process to PeopleSoft
    automation. Analyzed processes and devised a strategy to utilize PeopleSoft with
    minimum customization. Drafted a recommendation for business process change,
    developed functional specifications for four customizations to enable automation of
    highly complex identification and communication processes and coordinated with
    Student Records, Student Financials, and Financial Aid to insure seamless integration of
    Collections customizations and processing with other modules. Created a "Future State"
    document outlining the incorporation of PeopleSoft CRM to enhance functionality.
    Guided configuration and provided training to Collections Office personnel

Big Picture Solutions, Upland, CA   **May 2005 – April 2006**
PeopleSoft Consultant, Westwood College PeopleSoft 8 Implementation
  ➢ Provided broad PeopleSoft Student Administration functional expertise to the
    documentation and training teams. Designed and created on-line help documentation of
    the PeopleSoft Student Administration and CRM applications for use by staff, faculty,
    and students. Insured that documentation and training plans were matched to all set-up
    and fit/gap requirements. In addition to testing each implemented process personally,
    worked closely with members of the implementation team to insure complete and
    accurate functionality. Served as peer-reviewer/editor for other documentation team
    members.

H & W Fox, Inc., St. Charles, IL   **June 2003 – April 2007**

ORACLE CERTIFIED PARTNER

EMS Consulting | Intelligent Chaos

Personal Entrepreneurial Project
➢ Started and ran a small, non-technical, service related business. The business has been discontinued.

PeopleSoft, Inc., Westchester, IL   **April 2000 – June 2003**
Senior Technical Writer, SA Student Financials, CRM Marketing, and Telemarketing modules
➢ Co-authored Student Financials PeopleBook and authored CRM Marketing/Telemarketing books. Consulted with product managers, product strategists, developers, and analysts to define the scope of documentation required for new and changed setup requirements and functionality, and identify specific documentation needs. In addition, served as editor for topics written by other CRM team members.

PeopleSoft, Inc., Westchester, IL   **Feb. 1999 - March 2000**
PeopleSoft Consulting, Staff Functional Consultant, Student Financials

Consulting Engagements-
External clients — Short-term engagements to resolve specific issues:
➢ Virginia Community College System: conducted Student Financials fit/gap analysis with VCCS implementation representatives from multiple campuses.

➢ Grand Rapids Community College: various Financial Aid performance issues.

➢ College of Lake County: Financial Aid setup.

➢ Duke University: configure tuition calculation (specifically, tuition groups).

➢ University of Minnesota: assigned as Student Financials member of joint PS Consulting/Global Service Center "SWAT Team" to resolve large backlog of performance issues.

➢ Internal client — Long-term engagement involving a wide variety of issues.

➢ PS Student Financials Development, Encino, CA. Provided functional guidance to SF development team, product testing, and served as internal troubleshooting liaison to PeopleSoft consultants. Documented several processes for internal use by consultants.

Northern Baptist Theological Seminary, Lombard, IL   **Oct. 1994 – Jan. 1999**
Director of Student Financial Services
➢ Led implementation of a new Student Administration computer system (CAMS from Three Rivers Systems). Converted all data from legacy system into CAMS. Set up the Financials component of the system. Assisted the Director of Admissions and the Registrar in setting up the Recruiting and Student Records components. Managed all non-academic services to students including bursar activities, student housing, and payment plans. Served as acting Registrar for ten months

Education:

➢ PeopleSoft University   PeopleTools, Student Financials, Financial Aid
➢ Northern Baptist Theological Seminary   MA ThS
➢ Drake University   BA, Organizational Administration

Publications:

➢ Learning Solutions Development Team and Learning Solutions Documentation Team (Curtis Welsh, contributor). (2001). PeopleSoft 8 Student Administration: PeopleSoft Student Financials Business Processes. PeopleSoft, Inc.

➢ CRM Development Team and CRM Documentation Team (Curtis Welsh, contributor). (2002). PeopleSoft 8.1 Customer Relationship Management: PeopleSoft CRM Marketing Business Processes. PeopleSoft, Inc.

➢ CRM Development Team and CRM Documentation Team (Curtis Welsh, contributor). (2003). PeopleSoft 8.8 Customer Relationship Management: PeopleSoft CRM Marketing and Telemarketing Business Processes. PeopleSoft, Inc.

➢ Additionally, contributed to numerous Release Documents and internal documents for use by PeopleSoft Consulting.

Joe Harvey
Senior PeopleSoft Student Financials Consultant

Summary:
Joe Harvey is a Senior PeopleSoft Student Financials Consultant with fifteen (15) plus years' of experience. He has worked specifically with PeopleSoft Student Financials for functional training and consulting for all releases from 7.0 to 9.0. Additionally, Joe is a PeopleSoft certified trainer, and PeopleSoft certified consultant. With experience in the following: implementations, production support, testing and scripting, training, fit/gap analysis, documentation, and upgrades.

Professional Experience:

Florida International University (FIU), Miami, FL   **Sep. 2013- June 2014**
- ➢ Production support in all areas of Student Financials plus involved in projects such as Visa payment and student payment plan implementation via HigherOne.
- ➢ Student Financials representative in all campus meetings involving Student Financial including bi-monthly campus wide meetings, ad hoc meetings, the New Term Structure project. Supervise staff and involved in interviews of new permanent staff.
- ➢ Functioning as assistant controller until permanent staff is in place.

University of Connecticut (UConn), Storrs, CT   **Mar. 2013 – Sep. 2013**
- ➢ Student Financials Functional Lead for Process Improvement Project. Anticipated end date is September 2013

Stanford University, Palo Alto, CA   **Nov. 2012 – Mar. 2013**
- ➢ Functional Lead for transitioning from HR refunding to AP refunding due to database split.

Queen's University, Belfast, Northern Ireland   **Mar. 2012 – Oct. 2012**
- ➢ Lead Student Financials Functional Consultant for the Qsis re-implementation project. Scheduled to end 10/26/2012.

Stanford University, Palo Alto, CA   **July 2011 – Mar. 2012**
- ➢ Student Financials Consultant working on production support, version 9.0.
- ➢ The Student Financials operation was moving from the financials area (off campus) to student affairs (on campus).
- ➢ Heavily involved in the transition, including training of staff, learning custom processes and modifications, analyzing them, and getting them transitioned.
- ➢ Also involved in daily production support issues related to such things as tuition calculation, refunding, posting issues, queries (PeopleSoft and SQL), and other student financials issues that arise such as with CASHNet.

Rochester Institute of Technology, Rochester, NY   **Apr. 2011 – July 2011**
- ➢ Student Financials Consultant assisted with implementation, version 9.0.

Bellevue University, Bellevue, NE   **Aug. 2010 – Apr. 2011**
- ➢ Student Financials Consultant for production support (tuition calc, queries, and billing, primarily but other issues as well), version 9.0.

Nelnet Business Solutions   **May 2010 – Dec. 2010**
- ➢ Worked with Nelnet Cashiering interface to Campus Solutions. Worked with Southern Methodist University and (mostly with) James Madison University

Strayer University, Herndon, VA   **Dec. 2009 – May 2010**
- ➢ 9.0 Implementation involving most aspects of Student Financials (tuition calc, item types, tree manager, etc.)

The Ohio State University, Columbus, OH   **Dec. 2008- Dec. 2009**

➢ 8.9 Implementation: testing, security, configuration management, troubleshooting such areas as tuition calculation & collections, training, coordinating batch processes, staging test data, managing defects, and more.

Southeastern Louisiana University, Hammond, LA   **2009 part-time/remote**
➢ Part-time production support version 9.0 focused mostly on credit history and tuition calc troubleshooting.

Stanford University, Palo Alto, CA   **June 2007 – Spring 2008 part-time**
➢ Assisted with upgrade from 8.0 to 9.0

Indiana University, Bloomington, IN   **Sep. 2007 – Spring 2008 part-time**
➢ Assisted with upgrade from 8.9 to 9.0

Kansas State University, Manhattan, KS   **Sep. 2006 – Oct. 2008**
➢ Student Financials Lead Consultant, 8.9 implementation.
➢ Went live July, 2008. Was responsible for all key areas of student financials.

University of Pittsburgh, Pittsburgh, PA   **Feb. 2006 – 2008 & Nov. 2012**
➢ Direct contract with the university; responsible for production support (GL reconciliation, payment allocation errors, tuition calc issues, refunding issues, return of Title IV funds and more) and additional development

University of New Orleans, New Orleans, LA   **Jun. 2004 – Dec. 2004**
➢ Student Financials lead for upgrade from 7.6 to 8.0

University of Cape Town, Cape Town, South Africa   **July 2004 – Jan. 2006**
➢ Student Financials lead for Student Financials 8.0 implementation.
➢ This was a part-time assignment involving periodic visits to Cape Town and remote work.
➢ Responsible for all aspects of student financials implementation.

Alta Colleges, Denver, CO   **July 2005 – Oct. 2005**
➢ Student Financials testing using Mercury Professional testing tool. Part-time remote work.
➢ Primarily tuition calc testing for different categories of students.

University of Massachusetts System, Shrewsbury, MA   **Feb. 2005 – July 2005**
➢ Student Financials team member responsible for functional production support for some campuses and implementation for others.
➢ Left because of conflicts with the University of Cape Town contract and my desire to attend SAP training for two weeks in Heidelberg.
➢ **PeopleSoft Student Financials Consultant - PeopleSoft**

Indiana University, Bloomington, IN   **Mar. 2004 – June 2004**
➢ Student Financials lead for Student Billing. Also assisted with Cashiering.
➢ Employee of PeopleSoft. Left PeopleSoft to pursue independent endeavors.

PeopleSoft Student Financials Consultant – Ciber Enterprise Solutions   Mar. 2001 – Mar. 2004
➢ Louisiana Community & Technical College System implementation project, 7.6
➢ University of Arkansas implementation project, 8.0

- University of Houston Clear Lake production support, 7.6
- Jones County Junior College production support (primarily tuition calculation), 7.6
- Virginia Community College System production support, 7.6
- Rose State College fit/gap analysis, 8.0
- University of North Texas fit/gap analysis, 8.0
- Long Beach City College production support and 1098-T production lead, 7.6

PeopleSoft Student Financials Consultant – Various Independent Assignments 1998 – Mar. 2001
- Emory University implementation project, 7.6
- Cleveland State University production support, 7.6
- Wisconsin Technical College System implementation, 7.6
- Maryland Institution College of Art production support, 7.6

PeopleSoft Student Financials Product Demonstrator and Student Financials Instructor 1996 – 1998

Additional Postsecondary Educational Experience 1977 – 1995
- Louisiana State University Assistant Director of Financial Aid; Coordinator of Graduate Admissions; Part-time Developmental Reading Instructor
- Northwestern State University (Louisiana) Financial Aid Counselor
- Northeast Louisiana University (now University of Louisiana at Monroe) Project Talent Search Counselor; Student Employee for three years in Registrar/Admissions Office

Education:
- 1977 – 1980   Northeast Louisiana University, Monroe, LA
  - B.A. in Psychology
- 1981 – 1982   Northeast Louisiana University, Monroe, LA
  - M.Ed. in Counseling for Higher Education; Minor in Psychology
- 1984 – 1994   Louisiana State University, Baton Rouge, LA
  - Various undergraduate and graduate coursework.

Deahtra S. Johnson
PeopleSoft Campus Solutions – Admissions Consultant

Summary:

Deahtra Johnson is a Senior PeopleSoft Campus Solutions professional with twelve (12) years of experience in Higher Education. She has had seven (7) years of PeopleSoft Admissions experience, and her expertise includes configuration, conversion, customizations, business process design, training, specifications, presentations and demonstrations. She has acquired Solid Functional skills in Implementation, Upgrade and Post Go-Live Support in PeopleSoft Campus Solutions v8.0, v8.9, and v9.0 with a focus on Admissions, Recruitment and Campus Community.

Skills:

- PeopleSoft Campus Community
- PeopleSoft Admissions
- PeopleSoft Recruiting
- PeopleSoft Implementation Planning
- Decision Making and Problem Solving
- Business Process Mapping
- Fit/Gap Presentations
- Strategic and Operational Planning

- Public Presentations
- Customer Service
- Testing and Quality Control
- New Features Bundle Implementation
- Leadership and Motivation
- 2012 HEUG Presenter
- 2013 HEUG Mini Session Presenter

Professional Experience:

Florida A&M University, Tallahassee, FL   **2008 -Present**
Business Analyst – Campus Community/Admissions Lead
v9.0 Upgrade

- Lead admissions support for undergraduate, graduate, graduate online, and law admissions offices
- Project Leadership – Florida Virtual Campus Initiative
- Wrote specifications, documented and tested custom Checklist Item Update Organization ID process, Duplicate Emplid Report and the Board of Governors State Admissions Reports
- Configured Search Match Rules and Criteria for test score loads, electronic transcript loads and manual add a person
- Write admissions and enrollment ad hoc queries for staff and executive leadership
- Admissions lead for v9.0 upgrade: delta fit/gap, testing, documentation, and training. Ensured delivered and custom processes performed successfully: Test Score Load, EDI TS130 – Transcript Load, Online Application Load, SAT/ACT Calculation, Mass Matriculation, Mass New User Account Creation, 3Cs, etc
- Documented and implemented Notify feature within PeopleSoft for Campus Solutions staff
- Configured electronic FAFSA and Exit Interview communications via Comm Gen
- Validated data for Oracle BI Reporting for Campus Solutions
- Wrote specifications, prepared dating mapping, developed business process guides for FACTS interface (state supported online application)
- Wrote specifications and enhancements for Admissions Self Service
- Implemented new v9.0 features to include: Communication Generation – Missing Information Letters, Admit Email Notification, etc, Relations with Institution using Pop Select, Mass Assign and Release of Service Indicators and 3C Engine using Pop Select.
- Redesigned the undergraduate admissions communication plan to reduce paper costs and manual processing; to include merging communications together, utilizing self service, moving letter generation and mail merge documents to Oracle BI RTF templates and communication generation
- Evaluated 9.0 functionality and current business processes to determine and design Fit/Gap documentation
- Facilitated upgrade training and developed upgrade test scripts, training documentation and business process guides
- Provided documentation, online and onsite training for Law School of Admissions
- Assisted with security design and implementation for Campus Community and Admissions
- ImageNOW Admissions Lead
- Coordinated User Acceptance, Integration, Pre-Production and PeopleSoft Bundle testing

- ➢ Modified Person record queries

University of Wisconsin Eau Claire   **Sep. 2009**
SA Consultant/Campus Community/Admissions Lead
v9.0 Implementation/Post Go-Live Support
- ➢ Wrote and assisted with custom specifications
- ➢ Wrote numerous queries for troubleshooting and data maintenance
- ➢ Developed and configured communication generation and designed Oracle BI RTF templates
- ➢ Assisted with Admissions Self Service development
- ➢ Configured, documented and implemented admission deposit, intent to matriculate via student financials, mass matriculation and Population Selection
- ➢ Assisted with post go live issues
- ➢ Refined admissions configuration for more efficient reporting

Bowling Green State University, Bowling Green, OH   **Feb. 2008 – Sep. 2008**
PeopleSoft Functional Admissions/Campus Community Consultant
v8.9 Implementation
- ➢ Provided functional leadership for the 8.9 Student Admissions, Campus Community implementations
- ➢ Facilitated Post Fit/Gap Analysis
- ➢ Served on the Master Data Standards Committee for Campus Community
- ➢ Lead the configuration of Graduate College Admissions, Undergraduate Admissions, Student Recruiting and Campus Community to include Mass Change, Automated Evaluation and 3C Triggers
- ➢ Wrote business process and training documents
- ➢ Assisted with Bio/Demo Conversion testing
- ➢ Assisted and coordinated User Acceptance, Integration, Pre-Production and PeopleSoft Bundle testing
- ➢ Designed functional specifications for Admissions, Recruiting and Campus Community
- ➢ Lead and assisted with Campus Community and Admissions Security Design
- ➢ Prepared final documentation

Kansas State University, Manhattan, Kansas   **Dec. 2007 – Jan. 2008**
PeopleSoft Functional Admissions/Campus Community Consultant
v8.9 Post Go-Live Support
- ➢ Facilitated the testing prior to Go Live the Graduate admissions modules
- ➢ Provided end-user training
- ➢ Prepared final documentation

University of Southern Mississippi, Hattisburg, MS   **June 2007 – Nov. 2007**
PeopleSoft Functional Admissions Consultant
v8.9 Implementation
- ➢ Provide functional leadership for the upgrade from version 8.0-8.9.
- ➢ Analyze current business processes performed in PeopleSoft 8.0 and provide recommendations for best business practices for PeopleSoft 8.9.
- ➢ Design Business Process Documents for the undergraduate and graduate admissions offices.
- ➢ Rebuild over 150 queries with new 8.9 tables.
- ➢ Evaluate current modifications and interfaces to determine necessity in 8.9
- ➢ Remove or inactivate unused or unneeded set up values.
- ➢ Design security model for Undergraduate and Graduate Recruiting and Admissions offices.
- ➢ Design the graduate letter templates and configure 3Cs and 3C triggers.
- ➢ Assist with the Bio/Demo Data validation.
- ➢ Develop undergraduate and graduate recruiting and admissions upgrade and bundle test scripts.
- ➢ Evaluate and demonstrate new functionality in admissions including search match, test score loads, new navigational paths, bio demo update etc.

Kansas State University, Manhattan, Kansas   **Oct. 2006 - June 2007**
PeopleSoft Functional Admissions/Campus Community Consultant
v8.9 Implementation
- ➢ Facilitate the implementation of the undergraduate and graduate admissions modules
- ➢ Analyze current business processing procedures to determine business process recommendations
- ➢ Design modification specifications for enhancements and new functionality to the Education pages, Personal Comments and the Web Application interface.
- ➢ Collaborate with office staff to determine best business practices
- ➢ Identify undergraduate and graduate conversion needs to include bio/demo, test score, education and application data
- ➢ Wrote Business Process Recommendations, Business Processes, How To's, Security Plans, Security Spreadsheets and Test Scripts for undergraduate and graduate admissions offices.
- ➢ Prepare and present PowerPoint and live demonstrations of admissions functionality
- ➢ Configure the undergraduate and graduate admissions modules
- ➢ Design letter templates and build communications, checklists, and comments utilizing triggers and mass change definitions.
- ➢ Assist with the development of the standards document and the identification of naming conventions
- ➢ Work and collaborate with all functional areas (financial aid, student records and student financials) to mainstream the integration points within campus solutions

Florida A&M University, Tallahassee, FL   **2003 -2006**
Coordinator Admissions/Registrar –PeopleSoft Admissions Lead
v8.0 Implementation
- ➢ Successfully implemented and currently maintain Recruitment, Admissions, new user registration, Campus Community, and the web based collaborative applications system in PeopleSoft
- ➢ Extensively test, validate, monitor, and document PeopleSoft bundles(patches and fixes) and upgrades
- ➢ Build and execute queries for Recruiting Office, Admissions Office, Registrar's Office, Vice President's Office, President's Office, and various academic departments; Manipulate and format data in Microsoft Excel or Microsoft Access and distribute reports via email
- ➢ Develop and configure Business Process Designs documents, Test Scripts, Configuration Guides, Transaction Guides, Security Spreadsheets, Mail Merge Templates, Load Extract Files, Desk Top Manuals, Standard and Ad Hoc Reports utilizing Microsoft Word, Microsoft Excel (sorting, formulas, concatenating), PeopleSoft, and Microsoft Access.
- ➢ Configured mass userid set up and manage mass user id assignment process which assigns security roles to instructor, student, and applicants enabling users online self-service access
- ➢ Develop functional modification specifications for PeopleSoft campus community, new user registration, admissions, and recruiting Student Administration systems to include file layout designs for the admissions on-line application, ADMIT-M application, FACTS application, new user registration, reports, and other system modifications for Tier III programming
- ➢ Designed and configured all communications and checklists for health services, orientation, recruitment, admission, and student records utilizing Microsoft Excel, Microsoft Word, and PeopleSoft mass change and triggers functionality
- ➢ Participate as a member of various decision making committees
- ➢ Compile, organize, and review conversion data and design data mapping formulas
- ➢ Design inquire, access, and row level security for all admissions offices, recruiting and departmental access in relation to 3Cs and admissions
- ➢ Use queries, reports, and professional expertise to prevent or decrease impact of possible problems and human and/or technical errors
- ➢ Analyze problems or issues, determine the source, and provide solutions and recommendations for best solutions
- ➢ Manage an issues database by documenting, tracking, and updating the status of problems and/or issues
- ➢ Present live demonstrations, trainings, and workshops for university personnel

➤ Consistently provide strong post implementation support for over 8,000 users to include all three admissions offices, faculty, staff, students, applicants and prospects

Florida A&M University   Tallahassee, Florida   **1999 - 2003**
Senior Admissions Officer
➤ Evaluated applicant credentials and made admission decisions for freshmen, transfer, graduate, readmission, and international students
➤ Presented on site admissions workshops for prospects and scholars at recruiting events and local organizations
➤ Counseled prospects and parents on university admission policies, procedures, and requirements
➤ Edited admissions data file and assist with Summer, Spring, and Fall Department of Education reports
➤ Represented Director of Admissions at various administrative meetings
➤ Answered phones; organized and filed confidential applicant records

Jacksonville Job Corps, Jacksonville, Florida   **1996 - 1999**
CMI /Off Campus Coordinator
➤ Supervised and maintained computer network for approximately 50 computers
➤ Administered Test of Adult Education (TABE) Test
➤ Restructured incentive program for TABE Test
➤ Generated and distributed weekly reports to administrators and teachers
➤ Developed and implemented admission policies and procedures for off   center programs
➤ Assisted students in seeking financial aid, grants, and scholarships
➤ Managed off center programs totaling 150 – 200 at-risk students which include cosmetology, patient care, food service, welding, associate degree, and automotive mechanics
➤ Coordinated and facilitated educational assemblies
➤ Assisted with semi-annual graduations

Inter-group Relations Instructor
➤ Instructed at risk teens and young adults in cultural diversity and life skills
➤ Developed lesson plans to accommodate students of various levels of comprehension
➤ Used cooperative learning, individualized instruction, class lecture, hands-on lessons, and field trips as methods of instruction
➤ Evaluated and assessed student progress
➤ Coordinated and facilitated diversity training for administrators and staff

Scheduling/Testing Specialist
➤ Created weekly student schedules
➤ Administered and scored TABE Tests
➤ Monitored incentive program for TABE Tests
➤ Generated and distributed weekly reports to administrators and teachers

Education:
➤ Florida A&M University, Tallahassee, FL, B.S., Political Science with Teacher Certification

Gregory A. Slaughter Sr.
Senior Functional PeopleSoft Grants Suite Consultant

Summary:
Gregory Slaughter is a Senior Functional ERP Financial Consultant with the last fifteen (15) plus years focused exclusively in PeopleSoft Financial Software, covering all stages of the Project Life Cycle Development including System Business Process Analysis, Requirements Study, Fit-Gap Analysis, High Level Design, Detail Design, Application Development, Testing, Configuration, Implementation and Post-implementation support. He is very organized with the ability to manage multiple projects and meet deadlines while participating as a team player with high end documentation skills, excellent interpersonal and communication skills.

Skills:
- **PeopleSoft Modules/ Skills ver 7.5 to 9.2:** Project Costing, Grants Management, Contracts/Billings, Accounts Receivables, Asset Management, General Ledger, Commitment Control, Accounts Payable, Purchasing, Inventory, Order Management, Time and Expenses, Workflow, nVision, Crystal, Query, People Code, and People Tools. Design and configure PeopleSoft financials modules to comply with and support the accounting and regulatory standards as related to GAAP, GASB, and other statutory financial practices.

Professional Experience:
Kaiser Permanente, Pleasanton CA   **Sep. 2013-Present**
Senior Financial Consultant
Oracle PeopleSoft 8.9 Financials
One Link Program – Deloitte Integrator Project
- Kaiser Permanente is an integrated managed care consortium, based in Oakland, California; Kaiser Permanente is made up of three distinct groups of entities: the Kaiser Foundation Health Plan and its regional operating subsidiaries; Kaiser Foundation Hospitals; and the autonomous regional Permanente Medical Groups. Kaiser Permanente operates in nine states and is the largest managed care organization in the United States.
- Kaiser Foundation Health Plan and Kaiser Foundation Hospitals entities reported a combined $1.6 billion in net income on $47.9 billion in operating revenues.
- As Senior Financial Consultant reported directly to the Directors of the One Link Implementation Management team.
- Provided implementation consulting services related to system stabilization of the Project Costing Capitalization integration processes.
- Specifically responsible for management of the SWAT team conducting strategy and training sessions for Kaiser regional offices located in Georgia, Maryland and Denver.
- Assisted each offices capital projects accounting department with bring the regions in line with the One Link methodology for project costing for asset capitalization.
- Facilitated the processing of approximately 3.5 million dollars that was not capitalized in the PeopleSoft system.
- Developed and documented in conjunction with One Link management the system policies and procedures for capital project capitalization for all Kaiser regional offices.
- Additional responsibilities included assisting the Deloitte team with the new Kaiser Grants implementation.
- Reviewed the approach, business process design, and configuration documents.
- Conducted lessons learned sessions to help prevent replicating data conversion issues based on the data converted for capital projects.

McMaster University, Hamilton Canada   **Nov. 2012-July 2013**
Senior Financial Consultant
Oracle PeopleSoft 9.2 Financials
Deloitte MOSACI Project

➢ McMaster University is Canada's largest Research University with over 899 million dollars of grant funded awards.

➢ McMaster has two primary funding entities, Research Administration and Research Health Sciences.

➢ McMaster was in the process of replacing its 30 year old Legacy Financial System with PeopleSoft 9.2 Financials.

➢ As Senior Financial Consultant reported directly to the Directors of Research Finance and Health Science Research, provided implementation consulting services related to the transition of the University from its legacy and manual systems to the new PeopleSoft financial system.

➢ Primary responsibilities included conducting 25 fit gap sessions and 15 design sessions that produced design and configuration documents and detail values spreadsheets deliverables.

➢ Managed the project plan with Deloitte resources to meet deadlines and project deliverables according to the overall financials project plan.

➢ Developed and configured FSSBX and FSTST environments' for Grants, Projects, Contracts, and Billing, Receivables and Commitment Control modules.

➢ Assisted with the development all Grant and Project test scripts for each module and conducted system test and integration testing which enables the Universities, Budget Office, Grants and Project Costing administration to utilize both delivered and customized integration with the Grants, General Ledger, Accounts Payable, Purchasing and HRMS/ Payroll, Student Systems with Project Costing, Contracts, Billing and Accounts Receivables.

➢ Formulated and lead the grants team weekly meetings that identified outstanding decisions and the overall approach for the pre and post award grants module design and implementation.

➢ Because the initial Finance Go Live was staggered and schedule to begin before the Research Finance implementation I recommended the "Blue Bird" Solution which allowed Research Finance to remain consistent with the overall finance go live date. Developed the conversion mapping approach and mapping spreadsheet to create Awards, Contracts with related Project and activities.

➢ Based on the conversion of Legacy data to created projects that were associated with the design of the automated creation of grant award and contracts.

➢ Provided templates for security matrix with roles based on project teams and associated workflow.

➢ Lead the design of the Principle Investigators monthly budgetary activity reports and set up of the grants portal.

➢ Incorporated enhanced PeopleSoft 9.2 functionality through the design of the Supplementary custom fields' link on the Grants Awards and Project pages.

➢ This new functionality allowed the grants team to include required fields from their legacy system without the need for any additional customizations.

Battelle Memorial Institute, Columbus Ohio   **July 2012- Nov. 2012**
Production Support Specialist
PeopleSoft 9.1 Financials

➢ Battelle is a billion corporations with more than 100 locations worldwide; severing a wide spectrum of research, manufacturing and innovation interests for both scientific and commercial entities.

➢ Battelle utilizes Oracle PeopleSoft 9.1 financials to support its business operations.

➢ As Senior Consultant for Battelle's Cash to Contracts (C2C) team the primary responsibilities were to support the end user daily operations.

➢ This included trouble shooting transactional data, and business processes related to the monthly close and custom interfaces.

➢ Battelle's project costing configuration supports a complex array of rate sets and rate plans that have generated over 500 million rows of data to the proj_resource table.

➢ Supported analyzing and correcting data as it was interface from the proposal stage, to project costing through contracts, billing and AR. Lead an effort to reduce the size of the major data base tables in order to increase efficiencies and increase project accounting process times.

➢ Designed the methodology to create a custom table to house historical data based, on inactive contract statuses with related projects and activities.

➢ Worked closely with the technical resources and the DBA's to trouble shoot cross module integration issues to ensure the complete end to end cycle is processed related to Purchase Orders, Vouchers, Projects, GL transactions, Payroll and Expense transactions, Contracts, Billing Invoices and Accounts Receivables.

➢ Managed functional and technical team members and conducted it test, and user acceptance testing.

Community Healthcare System   **Jan. 2012- June 2012**
Project Costing and Commitment Control Lead
PeopleSoft 9.1 Financials

➢ Healthcare Systems one of the Midwest leading hospital medical entities in the greater Chicago land area was in the process of implementing the Oracle PeopleSoft 9.1 Project Costing module and Budgetary Commitment module for its major hospital capital projects.

➢ As Senior Consultant and Project Costing Lead and KK lead the primary responsibilities are to analyze the Healthcare Systems business process and procedures.

➢ Develop and manage the overall project plan and deliverable which include the following; As Is – To Be documentation, Fit Gap analysis, Conference Room pilot/prototype sessions, design sessions, deign/configuration document and all integration and customization documentation.

➢ Conducted a series of fit gap sessions combined with prototyping of the new business processes in PeopleSoft 9.1 that illustrated the additional functionality and resolved identified gaps as related to utilizing both delivered and customized integration with the Assets Management, General Ledger, Commitment Control, Accounts Payable, Purchasing and HRMS/ Payroll modules.

United States Department of Energy   **Jan. 2011- Dec. 2011**
Project Costing Lead - PeopleSoft 9.1 Financials BPMP project
Savannah River Nuclear Solutions Site and BTRG

➢ Business and Technology Resource Group (BTRG) is the primary implementing partner for Savannah River Nuclear Solutions Site (SRNS) which is funded and operated directly through the US Department of Energy (DOE).

➢ SRNS was currently revising their financial business process methodology and upgrading their PeopleSoft 9.1 systems.

➢ As Senior Consultant and Project Costing Lead primary responsibilities included managing the project from the fit gap phase through go – Live. Facilitated the design, development and configuration of Projects, Contracts, and Billing and Commitment Control modules.

➢ Also, was responsible for the development of test scripts for each module and conducted system test and integration testing and data conversion.

➢ The DOE is a projects based operation with all activities at SRNS connected to a project. Leaded a series of fit gap sessions combined with prototyping of the new business processes in PeopleSoft 9.1 that illustrated the additional functionality and resolved identified gaps as related to utilizing both delivered and customized integration with the General Ledger, Commitment Control, Accounts Payable, Purchasing and HRMS/ Payroll modules.

➢ Managing the support of the production environment. After the September 15th 2011 Go – Live, responsible for assisting with the monthly close and validating and reconciling conversion data. Reporting directly to the project manager and SRNS CFO, my responsibilities are to maintain continuity and data flow from the SCM feeder systems to Project Costing, General Ledger and Commitment Control ledgers.

➢ Identify customer specific custom reports and queries for the production end users and assist with writing enhanced business process and procedures.

➢ Working closely with the technical resources and the SRNS DBA to trouble shoot cross module integration issues to ensure the complete end to end cycle is processed related to Requisitions, Purchase Orders, Vouchers, Projects, GL transactions, KK transactions, Contracts, Billing Invoices and Accounts Receivables.

New York State Office of the State Comptroller   **April 2010- Jan. 2011**
Grants/Projects Lead - PeopleSoft 9.0 Financials Implementation
Deloitte and IBM FOCAS project

➢ The Office of the State Comptroller (OSC), the Division of the Budget (DOB) and the Office of the Chief Information Officer/Office for Technology (OCIO/OFT) have formed a partnership to develop the integrated Statewide Financial System (SFS) Program.

➢ The SFS Program is comprised of two tightly-coupled initiatives: replacement of the Office of the State Comptroller (OSC) Central Accounting System (CAS) and development of a centralized statewide Financial Management System (FMS) by the Division of Budget (DOB).

➢ As Senior Financial Consultant reported directly to the State Deputy Comptroller for the State of New York and provided implementation consulting services related to the transition of the State from its legacy and manual systems to the new PeopleSoft financial system. Primary responsibilities included the design, development and configuration of Grants, Projects, Contracts, Billing, Receivables and Commitment Control modules.

➢ Assisted with the development all Grant and Project test scripts for each module and conducted system test and integration testing which enables all the State's Agencies, Budget Office, Grants and Project Costing administration to utilize both delivered and customized integration with the Grants, General Ledger, Accounts Payable, Purchasing and HRMS/ Payroll with Project Costing and Contract.

➢ Manage in conjunction with Deloitte and IBM resources the State's project team members with identifying the State's business process re-engineering, conducted As – is, To –be Fit Gap Analysis and design sessions, identifying the State's Grants, Projects, Contracts, Billing and Receivables future business requirements. Also, identified configuration budgetary requirements related to Commitment Control.

➢ Designed and created the State's commitment control ledgers to support HRMS, Purchasing, Accounts Payables, Grant and Project Costing Budget Checking process for Pre- Encumbrance, Encumbrances, Expenses, and Revenues transactions.

➢ Managed the financial data conversion design to identify and mapped the State's legacy database to the required fields in the Grant Proposals, Grant Awards, Contracts, Projects and Commitment control modules.

➢ Reviewed and revised all the grant related documentation, including grant and projects design and configuration guide, conversion guide, workflow and excel detail values workbooks.

University of Hong Kong Science and Technology   Nov. 2009 -April 2010
Senior Financial Consultant
Oracle Corporation - PeopleSoft 9.0 Financials Implementation
➢ Hong Kong University is highest rated Technology University in Asia and has a 989 million dollar annual operating budget.

➢ As Senior Financial Consultant reported directly to the CFO of the University provided implementation consulting services related to the transition of The University of Hong Kong Science and Technology from its legacy and manual systems to the Universities' new PeopleSoft financial system.

➢ Primary responsibilities included the design, development and configuration of the General Ledger, COA, Commitment Control, Grants, Projects, Contracts and custom Budget Purchase order/Requisition modules.

➢ Configured the PeopleSoft system for the General Ledger, Commitment Control, Projects, Grants and Contracts modules.

➢ Wrote all test scripts for each module and conducted system test and integration testing which enabled the University's Finance, Purchasing and Project Costing administration to utilize both delivered and customized integration to the General Ledger, Accounts Payable, Purchasing and HRMS/ Payroll, Student Financials and Time and Labor with Project Costing.

➢ Designed and configured the General Ledger Closing Rules and Closing Process, Budget Closing Rules and Closing process.

➢ Designed and configured the General Ledger Revaluations, Allocations and Average Daily Balance processes.

➢ Manage in conjunction with Oracle resources the University's project team members with identifying the University's business process re-engineering, conducted As – is, To –be Fit Gap Analysis and design sessions, identifying the University's General Ledger Chart of Accounts and

Projects Chartfield requirements, analyzing the University's future Business Unit requirements and identifying configuration budgetary requirements related to Commitment Control.

➢ Designed and created the University's commitment control ledgers to support HRMS, Student Financials, Purchasing, Accounts Payables, Grant and Project Budget Checking process for Pre-Encumbrance, Encumbrances, Expenses, and Revenues transactions.

➢ Managed the financial data conversion design to identify and mapped the University's legacy database to the required fields in the General Ledger, Projects and Commitment control modules.

➢ Designed the custom payroll and Student Financial system interfaces and designed database views to link the University's existing Project Costing system the delivered PeopleSoft Project costing module with additional analysis types and groups and revised rate sets to accommodate payroll and fringe benefit transactions to be interfaced into the Projects Costing module.

➢ Conducted a complete analysis and configuration of General Ledger chart of Accounts and Project Costing Commitment Control Budget Ledgers, Indirect Cost (F&A) and Letter of Credit (LOC) functionality.

➢ Designed and facilitated the customized programmatic process to convert/transfer the University's existing project/grant budget balances from their existing legacy financial system ledgers to the delivered PeopleSoft comment control parent/child ledgers

Navistar Defense   **April 2009- Nov. 2009**
Team Lead
UK design implementation and Audited System Issues Support – PeopleSoft 9.0

➢ Navistar Defense currently one of the largest Defense contractors in the United States.

➢ Reporting Directly to the IT PeopleSoft manager I was responsible for leading a team of consultants in providing solutions to their PeopleSoft system outstanding audited material weakness issues.

➢ Also, I was selected to assist with the design and configuration of additional Business Units for Navistar Defense in the United Kingdom.

➢ I was responsible the configuration of all the related financial modules including revising the General Ledger Business Unit COA and integrating Projects, Contracts , Billing and AR.

➢ The work related to the UK implementation consisted of developing a conceptual design document that detailed the required modules with the integration points of those modules with new business processes.

➢ The following modules where identified as required; General Ledger, Contract, Billing, Order Management, Inventory and Accounts Receivables.

➢ I configured a prototype of the conceptual design in a Navistar development environment for the Contract, Billing and AR modules and generated transaction and journals on to the General Ledger based on the revised COA.

➢ Created reports/queries for GL and sub systems reconciliations.

➢ This design was approved to be move to production along with the creation of new business processes to support the new UK business unit.

➢ The primary modules with issues related to the audit findings where Billing and AR.

➢ I provided the following solutions: automated payments by configuring Payment Predictor utilizing out of the box PeopleSoft delivered functionality.

➢ This solution was approved and migrated into the Navistar production environment. Configured the projects and activity component interface to create and load projects and activities via spreadsheets into project costing.

➢ This solution was approved and migrated into the Navistar production environment. Setup the electronic lock box functionality to allow Navistar to electronically load bank payments into their PeopleSoft AR system.

➢ This process is pending the banks setup and configuration into their system.

➢ Revised the Billing configuration to group invoices by contract number and the Federal ID number.

➢ This allowed a complete audit trial between the Federal Billing system and Navistar's PeopleSoft Billing system.

Edelman   **Jan. 2009- April 2009**

Business Analyst
Global Public Relations - PeopleSoft Upgrade 7.5 to 9.0 Project
- ➢ I was responsible for analyzing the business process differences between PeopleSoft version 7.5 and 9.0.
- ➢ Reviewing and making recommendations for customizations to be rolled forward or replaced with new functionality.
- ➢ Responsible for data design, implementation and data conversion of the 7.5 data values into the 9.0 PeopleSoft tables, and for unit testing, system testing and integration testing of the data.
- ➢ Responsible for designing and developing the conversion of prepaid contracts and projects which created and posted approximately 28 million dollars utilizing the project costing, contracts, and Billing and AR modules.
- ➢ Due to Edelman's numerous customizations, I was required to map data from the 7.5 tables to the 9.0 tables and implement any additional configuration related to all the financial modules and test the data to ensure specific financial reporting requirements.
- ➢ Wrote all test scripts for each module and conducted UAT which enabled the Edelman staff to utilize the delivered integration of the General Ledger, Accounts Payable, Purchasing and HRMS/ Payroll and Time and Labor with Project Costing.
- ➢ Wrote and tested additional UAT scripts for Contracts, Billing, AR and Expense/Travel as related to cost reimbursable and fixed fee Contracts in order to facilitate and support the Edelman's PeopleSoft Billings and Receivables modules.

The City of Albuquerque New Mexico   **Aug. 2008- Jan. 2009**
Senior Project Management Consultant
Projects Costing/Grants PeopleSoft 9.0 Implementation
- ➢ As Senior Project Management Consultant, provided implementation consulting services related to the transition of The City of Albuquerque from its legacy and manual systems to the City's new PeopleSoft financial system.
- ➢ As of January 4th 2009 the City of Albuquerque is live on both Financial and HR PeopleSoft modules. Primary responsibilities included the design, development and configuration of the COA, Projects, Contracts, Billing Commitment Control and Accounts Receivables modules. FINPROD90 environments.
- ➢ Wrote all test scripts for each module and conducted UAT which enabled the City of Albuquerque's Project Costing administration to utilize the delivered integration of the General Ledger, Accounts Payable, Purchasing and HRMS/ Payroll and Time and Labor with Project Costing.
- ➢ Wrote and tested additional UAT scripts for Contracts, Billing and AR as related to cost reimbursable and fixed fee Contracts for CIP/Operating Projects and Grants in order to facilitate and support the City's PeopleSoft Billings and Receivables modules.
- ➢ Designed the custom payroll interface and created additional analysis types and groups with revised rate sets to accommodate payroll and fringe benefit transactions to be interfaced into the Projects Costing module to be priced and create the required BIL rows and additional Indirect Overhead Cost rows. Conducted a complete analysis and configuration of General Ledger chart of Accounts and Project Costing Commitment Control Budget Ledgers, Indirect Cost (F&A) and Letter of Credit (LOC) functionality.
- ➢ Designed and facilitated the customized programmatic process to convert/transfer the City's existing project/grant budget balances from their existing legacy financial system ledgers to the delivered PeopleSoft comment control parent/child ledgers.
- ➢ Developed and implemented the project plan with detailed task and sub-task related to Project Costing, Contracts, Billing, Commitment Control and Accounts Receivables.
- ➢ Provided hands-on mentoring, tutelage, problem resolution, and identification of business process change impacts to achieve the project objectives and, at the same time, transferred knowledge to the team members to develop the skills sets necessary for them to become competent People Soft functional specialists.

The City Colleges of Chicago   **May 2008- Aug. 2008**
PeopleSoft Grants Consultant

PeopleSoft 8.4 to 8.9 Grants Upgrade Implementation
- The City Colleges of Chicago (CCC) district is comprised of seven separate campuses located throughout the city of Chicago.
- These seven campuses are supported by the districts central office administrative office located in downtown Chicago.
- The district utilizes the PeopleSoft 8.4 and will upgrade to 8.9 financial modules to support the financial operations of the colleges.
- The district's total unrestricted grant funds are approximately 55 million dollars annually.
- As Senior consultant reporting directly to the Controller of finance provided Grants implementation consulting services related to providing the colleges and central administration with a complete PeopleSoft Grants solution.
- Primary responsibilities included the design, development and configuration of the Grant, Projects, Contracts, Billing and Accounts Receivables modules and conducted a complete analysis and configuration of General Ledger Chart of Accounts.
- Successfully configured CCC's test and go live production environments to enable the colleges and the administration to utilize the complete Grants module functionality from Pre- Award to Post Award and integration with Projects, Contracts, Billing and AR as related to cost reimbursable and fixed fee Grant Billings and Receivables. Facilitated the design of the payroll interface and created additional analysis types and groups with revised rate sets to accommodate payroll and fringe benefit transactions.
- Facilitated the design and implementation to convert and transfer the colleges existing grants/project data from the customized commitment ledgers to the delivered parent child ledgers to support the grants, projects, contract and billing modules.
- Conducted a complete analysis and configuration of General Ledger and Grant Commitment Control Budget Ledgers, Indirect Cost (F&A) and Letter of Credit (LOC) functionality.
- Created test scripts for each module and conducted system test, UAT test and stress test from requisitions to vouchers utilizing all the delivered integration processes for all seven colleges and the central administration.
- Provided documentation, knowledge transfer and system support.

State of Connecticut Department of Transportation,   **July 2007- April 2008**
Senior Project Management Consultant
Grants and Federal Billing PeopleSoft 8.9 implementation
- As Senior Project Management Consultant, provided implementation consulting services related to the transition of the Transportation (DOT) from its old FIMS legacy system to the State CORE-CT PeopleSoft financial system.
- Primary responsibilities include the PeopleSoft knowledge transfer process which allows DOT staff to configure the base tables and transaction environments for the People Soft Financial modules related to Projects, Contracts/Billings, and Accounts Receivables.
- As PM consultant, identified and developed the critical path tasks and timeline that facilitated processing of Federal Billings within the CORE – CT environment.
- Managed DOT team members with the review of the state's Federal Billing design, and, tested the configuration in order to begin processing transactions in the DOT's production environment.
- Successfully manage the DOT billing staff to process federal bills and receive reimbursements of approximately 327 million for FHWA, FTA and FAA for the period beginning July 1, 2007 through April 1, 2008.
- Designed, and wrote the CT-DOT's Federal Billing Procedures manual as related to the new PeopleSoft functionality for the Department of Transportation Federal Billing department.
- This manual documents all the requirements, assumptions and integrated billing processes within the State's CORE-CT PeopleSoft system.
- The documentation illustrates the procedures for the complete billing cycle, which encompasses the State's Procurement, Accounts Payable requirements, Project Budgets (Commitment Control), Payroll interface, General ledger COA (Funds/Programs) Project Costing attributes (activities, sources, project types), Contract attributes (rate sets/plans, transaction limits, transaction ID's)

Billing interface process(custom extract file for FHWA) invoice generation, and Accounts Receivables processing.
➢ This manual also fully documents the State customized allocation process for the split of Federal and State expenditures (FATE).
➢ This process allows for the correct percentage of Federal, State, Town and In-Kind split on expenditures that are interfaced into the project costing modules resulting in accounting entries by state, federal and other funds for posting to the general ledger with corresponding BIL rows generated after running the pricing process.
➢ Managed the DOT's PeopleSoft reporting requirement as related to all departments within the DOT.
➢ Facilitated gathering of functional and technical design requirements for the identified departments.
➢ Conducting design and review session with end users to finalize reporting requirements. Worked with the CORE – CT technical staff to assist with translating the functional aspect of all reports.
➢ Worked with DOT management to help understand the need to standardize the departmental reports as much as possible to avoid numerous individual reports.
➢ Trained end users on how to utilize the existing CORE –CT reports covering the areas of project budgets vs. exp, contract limit processing, and billing adjustment reports.

Open Solutions Banking Software Corporation,   July 2006 - June 2007
New Acquisitions PeopleSoft 8.9 Implementation Project
➢ Open Solutions Inc. (OSI) is a $1.4 billion dollar company that provides banking technology software and services to their customers throughout the United States and Canada.
➢ OSI utilizes PeopleSoft financials software as their internal financial system.
➢ As Senior Consultant, provide implementation consulting services related to the conversion of OSI's new company acquisitions legacy financial data into OSI's PeopleSoft financials environment.
➢ Major responsibilities include the PeopleSoft knowledge transfer process which allows OSI's ERP teams to configure the base tables and transaction environments for the People Soft Financial modules related to Projects, Contracts/Billings, Accounts Receivables and Expense/Travel.
➢ Managed OSI's team members with the design, development, test and configuration phases of the project, including the establishment of a go-live production environment.
➢ Designed and implemented a customized functional and technical interface solution for OSI to process customer banking data from the data centers into PeopleSoft Projects Resource module for projects linked to the contracts with rate base contract lines.
➢ Designed and developed the analysis group, analysis types and rate templates to support the pricing of billable products inserted to the proj_resource table via the interface.
➢ Designed and developed accounting rules based on project type, operating unit and departments to support the as – incurred billing and revenue methods of the contract lines.
➢ Designed, and developed a customized PeopleSoft Billing invoice. Implemented new Accounts Receivable functionality that allows OSI USA and Canada account receivables department to utilize the Direct Debit process.
➢ This enabled the company to increase revenue recognition and to accommodate the existing customers that were acquired during the acquisition.
➢ Overall primary responsibilities include the development and maintenance of the Project Plan, Design, Development, Configuration, Unit and System test documentation, Issue Resolution Processes, SP Bundles, Patches, Data Conversions, System Configurations, UAT Test Scenarios, UAT Test Scripts, Resolution of Testing Issues, Financial Reports and Business Process Change Impacts.
➢ Provided additional consulting and training related to People Soft Trees, Security, and Account Distribution.
➢ Provide hands-on mentoring, tutelage, problem resolution, and identification of business process change impacts to achieve the project objectives and, at the same time, transfer knowledge to the team members to develop the skills sets necessary for them to become competent People Soft functional specialists as related to Projects, Contracts/Billings, Accounts Receivables and Expense/Travel.

University of Florida   **Oct. 2005- June 2006**
Lead Consultant
PeopleSoft 8.4 Grants, Contracts, Billing, Accounts Receivables Re-Integration
  ➢ As lead consultant, responsibilities include the following - functional management consulting for the development and re-engineering , for University of Florida's sponsored research division as related to Grants, Projects, Contracts, Billings, and Accounts Receivables modules.
  ➢ Manage in conjunction with university resources the university's project team members with identifying the sponsored research design for business process re-engineering. Conducted As – is, To –be Fit Gap Analysis sessions identifying the university's Grants, Contract, Billing, Projects and AR re-design requirements and business policies and procedures.
  ➢ Demonstrated the Grants module functionality from Pre- Award to Post Award and integration with Projects, Contracts, Billing and AR as related to cost reimbursable and fixed fee Grant Billings and Receivables. Conducted a complete analysis and configuration of Grant Commitment Control Budget Ledgers, Indirect Cost (F&A) and Letter of Credit (LOC) functionality.
  ➢ Develop and conduct design sessions in the university's configured test environment that demonstrated the complete end to end processes from the creation of Requisitions, PO's, Grants, Projects, Billings, AR, AP Vouchers through the General Ledger integration process cycle. Provide complete integration documentation utilizing the PeopleSoft environment and PowerPoint presentations.
  ➢ Designed and developed the following system modification in conjunction with technical resources: AR re-funds processing, billing specialist identifier, AR customer maintenance search by contract, customized Dunning Letters, updated contract events functionality, updated amendment functionality, designed invoice/reports.
  ➢ Additional responsibilities include consulting and training related to People Soft Trees, Security, and Account Distributions. Assisting with the development and submission of the Project Deliverables, Project Plan, Configuration Documents, Interface Documentation, Issue Resolution Processes, System Configurations, UAT Test Scenarios, UAT Test Scripts, Resolution of Testing Issues, Financial Reports and Business Process Change Impacts.

State of Delaware   **Aug. 2004 - Sep. 2005**
Lead Consultant
PeopleSoft 8.8 Financials Implementation
  ➢ As lead consultant, responsibilities include the following - functional management consulting for the development and implementation of the conceptual design, prototype and development environments for the State of Delaware's three hundred and fifty state agencies budget units as related to Grants, Projects, Contracts, Billings, and Accounts Receivables and Assets modules.
  ➢ Develop and conduct live workshops in the State's configured development environment that demonstrated the complete end to end processes from the creation of Requisitions, PO's, Grants, Projects, Contracts, Billings, AR, Assets, AP Vouchers through the General Ledger integration process cycle.
  ➢ Provide complete integration documentation utilizing the PeopleSoft environment and PowerPoint presentations. Manage in conjunction with IBM resources the State's project team members with identifying the State's business process re-engineering, conduct As – is, To –be Fit Gap Analysis, identifying the State's General Ledger Chart of Accounts and Projects Chartfield requirements, analyzing the State's future Business Unit requirements and identifying configuration budgetary requirements related to commitment control.
  ➢ Created a prototype of the State's commitment control ledgers to support Grant and Project Budgets, Pre- Encumbrance, Encumbrances, Expenses, and Revenues transactions.
  ➢ Directly responsible for analyzing and configuring the development environment for the State's forty – seven elementary school districts as related to People Soft' Grants Management. Demonstrated the Grants module functionality from Pre- Award to Post Award and integration with Contracts, Billing and AR as related to cost reimbursable Grant Billings and Receivables. Conducted a complete analysis and configuration of Grant Commitment Control Budget Ledgers, Indirect Cost (F&A) and Letter of Credit (LOC) functionality.

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29

➢ Directly responsible for and analyzing and configuring the development environment for the State's Department of Transportation as related to Project Costing Construction Projects. Analyzed, redesigned and configured the development environment for the State's 546 million dollar capital bond issue business process to incorporate PeopleSoft project costing functionality for State, Federal and Other capital project activities.

➢ Re-designed the State's Office of Budgeting business processes to facilitate utilization of Project Costing Chart fields and Project Costing Commitment Control Budget Ledgers.

➢ Directly responsible for and analyzing and configuring the development environment for the State's Accounts Receivable and Billing processes as related to Inter and Intra Departmental Billings, Miscellaneous Billings, Federal Draws, Revenue Recognition, AR Payments, Cash Receipts Collections, Customer Setups, Electronic Bank Statement Reconciliations and Direct AR Journal Entries.

➢ Additional responsibilities include consulting and training related to People Soft Trees, Security, and Account Distributions. Assisting with the development and submission of the Project Deliverables, Project Plan, Configuration Documents, Interface Documentation, Issue Resolution Processes, SP Bundle Upgrades, Patches, Data Conversions, System Configurations, UAT Test Scenarios, UAT Test Scripts, Resolution of Testing Issues, Financial Reports and Business Process Change Impacts.

Florida A&M University   Sep. 2002- March 2004
Project Manager
PeopleSoft 8.4 Phase I, II Grants Implementation

➢ Provided project management consulting services necessary for a knowledge transfer process which allows the university's ERP teams to configure the base tables and transaction environments for the PeopleSoft Financial modules related to Grants, Project, Contracts, Billings and Receivable.

➢ Managed FAMU team members with the, configuration phases, and with the go-live environment and system roll out to the key institutional stakeholders.

➢ Provided hands-on mentoring, tutelage, problem resolution, and identification of change management impacts to achieve the project objectives and, at the same time, transfer knowledge to the team members to develop the skills sets necessary for them to become competent PeopleSoft functional specialists as related to Grants, Project, Contracts, Billings and Receivable modules.

➢ Provided additional consulting and training related to PeopleSoft Trees, Security, Account Distribution, and Commitment Control.

➢ Florida State University and Florida A&M University PeopleSoft 8.4 Phase I Grants Implementation

➢ As an Associate, provided functional PeopleSoft consulting services simultaneously for both universities in the areas of design, development, testing and configuration of their Prototypes systems as related to their PeopleSoft Grants, Projects, Contracts, Billing and Accounts Receivables modules implementation.

➢ Ohio State University, PeopleSoft Financials 8.4 Grants/Billing/ Accounts Receivable Implementation

➢ Lead for the assessment of the Accounts Receivable module functionality.

➢ Developed requirements matrix, identified current business processes as related to future business processes to be performed in PeopleSoft 8.4.

➢ Identified the scope of the AR module and developed the initial work plans with associated task.

PwC Consulting: Sep. 2000 - Sep.2002
Senior Consultant

➢ American Electrical Power Corporation, PeopleSoft Financials 8.0 Implementation Managed a team of fifteen (15) individuals comprised of client and PwC resources though the completion of all phases of the full implantation cycle including assessment, design, development, build, testing, training and implementation. Primary responsibilities included assisting in the strategic development, change management and design of the reorganization and deregulation of the utility company as related to the implementation of the PeopleSoft General Ledger Financials ERP system.

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- Identified and implemented integrated customized systems related to allocations, consolidations, security, and business rules referencing combination editing, reporting and general ledger processing.
- Managed requirements for integration and implementation of customized systems related to internal, PeopleSoft Accounts Payables, Accounts Receivable, Purchasing, Payroll, Project Costing, Budgeting and HR applications.
- Established interface requirements for external applications related to Asset Management, Capital and Fleet leases.
- Managed project plans, identified resources, submitted status reports, created test criteria and consulted the client on change management issues, business process strategies and industry best practices.
- Hewlett Packard /PricewaterhouseCoopers, PwC Merger Project Lead for the Oracle Financials Business Process Re-Engineering in anticipation of the Hewlett Packard/PWC merger.
- Managed a team of eight (8) individuals to identify current PwC financial business processes to facilitate the creation of new separate business entities.
- Reviewed current Oracle Financials Modules; organizational/resource requirements and developed an analysis of major business financial processes.
- Conducted 'As-Is' analysis of current internal/external systems integration, conducted 'To-Be' analysis of current internal/external systems integration, performed a Gap analysis of all areas of internal support services versus the new business entity, identified and tested performance issues as well as issues related to input versus outputs, and defined new entities financial reporting and transition/communications processes.

Trans-Tech, Incorporated: Senior Consultant   **May 1999 –Aug. 2000**
Inktomi Internet Corporation, PeopleSoft Financials 7.5 Implementation
- Project lead for the Phase II implementation of version 7.5 PeopleSoft Financial modules GL, AP, PO, AR, OM, BI. Created project work plans conducted RAD sessions, documented and presented business process findings and recommendations.
- Developed prototypes of recommendations per modules and conducted UAT per modules.
- Migrated prototypes into the production environment and provided support, analysis and reconciliation to support production environment.

Columbia College, PeopleSoft 7.5 Financials Upgrade
- Provided functional and technical consulting to Midwest College's Financial and Information Systems departments by facilitating updating general ledger balances, voucher postings and applying required fixes and patches.

PeopleSoft, USA: Professional Services Consultant   **Oct. 1998- May 1999**
University of San Francisco Medical School, PeopleSoft 7.5 Financials Upgrade
- Provided functional and technical PeopleSoft consulting to the Information Systems Department.
- Consulted with the Controller on the set up of ledgers and budget reports and then assisted in upgrading the system.

University of Iowa, PeopleSoft Financials
- Provided functional and technical PeopleSoft consulting to the Accounts Payable and Information Systems departments by resolving critical system conflict errors related to voucher posting and process scheduler.
- Accomplished the monthly close of AP journal entries to the GL.

Tucson Unified School District K-12, PeopleSoft Financials
- Provided functional and technical PeopleSoft consulting to the Billing and Accounts Receivable departments as related business process design and the PS system.
- Consulted with department managers to identify system requirements document gaps and develop procedures to support the AR and Billing application.

City Colleges of Chicago: Associate Controller Finance   April 1989- Oct. 1998
City Associate Controller Finance – reported directly to Vice Chancellor of Finance.
- ➢ Managed twelve (12) individuals and approximately ($300 million) in financial information for College districts resources of revenues, expenses, assets, liabilities and capital.
- ➢ Additional Positions with the City Colleges - Kennedy-King College -Director of Business and Operational Services - Special Assignment, Finance - Director of Accounts Payable - Special Assignment, WYCC-TV Business Manager.

Education:
- ➢ National Louis University, Chicago
   Bachelor of Science - Business Administration
- ➢ National University, San Diego
   Master's Degree - Global E-Commerce

Jim Pelton
HFM Consultant

Summary:
Jim Pelton is a Senior Hyperion consultant with over twenty three (23) years of experience in Financial Consolidation and Reporting System design, implementation and support, specializing in Oracle Hyperion products. He has an extensive skill set used in creating business solutions based on Oracle Enterprise Performance Management suite, including Hyperion HFM, Hyperion FDQM/FDM/FDMEE, Financial Reporting Studio, Smartview, Calc Manager and Rules, Hyperion Essbase, and Hyperion Enterprise.

Highlights:
  ➢ Skilled at using VB Script, Python/Jython script, SQL Server, and Microsoft Access.
  ➢ Specialize in data migration, building custom tools to extract, convert and load data between systems. Extensive experience in upgrading existing Hyperion Enterprise applications to HFM.
  ➢ Excellent interpersonal skills, ability to communicate with end users as well as senior management, liaison between functional and IT organizations, manage documentation and provide end user education.

Skills:

  ➢ **OBIEE/EPM:** Hyperion HFM/FDQM/FDM/FDMEE through 11.1.2.3.x, Hyperion Essbase, Calc Manager, Financial Reporting Studio, Smartview, Shared Services, Security

  ➢ **Database:** SQL Server 2008, MS Access
  ➢ **Languages:** SQL, PL/SQL, Python, Jython, VB Script, VB 6, VB.Net

Professional Experience:

JPI Consulting   **Nov. 1997 - Present**
Contracted consultant sought by clients to design, develop and implement financial consolidation and reporting systems in a variety of industries and environments. Major projects include:

Palace Sports and Entertainment   **Oct. 2013 – Dec.2013**
HFM Consultant
  ➢ Tasked with support of existing HFM and FDM applications.
  ➢ Performed system restoration and application rebuild after total production and backup environment failure.

Tower International   **Nov. 2012 – Sep. 2013**
HFM Consultant
  ➢ HFM consultant tasked with design, development and implementation of HFM application to replace aging Hyperion Enterprise reporting tool.
  ➢ Significant effort in rules writing, historical data migration and validation to support multi-dimensional product line reporting, for domestic and international reporting sites. Included Cash Flow, currency translation and intercompany elimination and reporting.
  ➢ Created new FDM application to facilitate GL to reporting system mapping and data migration from legacy data warehouses.
  ➢ Created tool to convert older HP Retrieve Excel files to new Smartview format. Provided administrative and end user training and documentation.

Navistar International   **May 2007 – Oct. 2012**
HFM Consultant
  ➢ Implemented Cash Flow reporting in HFM using custom web forms, reports and scripting.
  ➢ Built multiple custom applications using API tools integrating Hyperion HFM, FDM, DRM and external applications.

- ➢ Built and supported multiple data migration utilities for transfer of structure and data files between Oracle, Essbase and SQL Server databases.
- ➢ Design and support automated scripting routines within FDM/HFM as well as custom error log tools.
- ➢ Development and support of multiple Hyperion Enterprise applications designed to assist with financial restatement exercises.

Spectra Energy   **Jan. 2007-Feb. 2007**
HFM Project Lead
- ➢ Led implementation of Hyperion Enterprise applications for Spin-off Company from Duke Energy.
- ➢ Developed documentation, user training sessions and materials, updated and created from scratch AutoPilot and Ledgerlink utilities, assisted with year-end rollover.
- ➢ Provide documentation, testing and support for network and application security.

Memorex Corporation/Imation   **Oct. 2005 – Oct. 2006**
HFM Consultant
- ➢ Implemented changes to Hyperion Planning/Essbase 7 applications for budget cycle and merger with Imation.
- ➢ Affected products included Hyperion Planning, Analyzer and HAL application development.
- ➢ Converted existing applications from fiscal year end March to fiscal year end December as a result of merger.

Sara Lee Foods   **Jan. 2003 – April 2007**
- ➢ Designed, built and supported multiple Hyperion Enterprise applications.
- ➢ Built and maintained custom data interchange tools using MS Access, VB .NET, and SQL Server to assist data migration efforts between planning, accounting, and reporting applications.
- ➢ Supported Financial Planning and Analysis group through major company restructuring exercise and product line reporting changes.

Fifth Third Bank   **April 2005-Aug. 2005**
- ➢ Provided interim administrative support of several Hyperion Enterprise applications, including daily GL reporting system used by several hundred branch offices, as well as monthly management and budget/forecast reporting.

Warner Brothers   **Sep. 2003-Dec. 2003**
- ➢ Participated in design of reporting, consolidation and data interchange strategy between SAP and Hyperion Enterprise applications.
- ➢ Systems spanned 13 international and domestic divisions of a major entertainment industry leader.

Cincinnati Bell Telephone   **Jan. 2001-March 2002**
- ➢ Used Hyperion Enterprise Application Developer's Toolkit (API) and Visual Basic to develop extract, load, and consolidation routines which moved data between Hyperion Enterprise, Hyperion Essbase, and Microsoft Access applications.
- ➢ Created a custom billing application using MS Access.
- ➢ Upgraded and supported multiple Hyperion Enterprise applications for government regulated product line and departmental reporting of actuals and budget.
- ➢ Created and supported product-line revenue reporting database in MS Access.

Omnicare Pharmaceutical Services   **Nov. 1997-Dec. 2002**
- ➢ Upgraded existing Hyperion Enterprise applications from release 5.1 to 6.1.1 including migration of Reporting, Sites, LedgerLink and AutoPilot modules.
- ➢ Upgraded Retrieve Excel workbooks from Excel 97 to Excel 2002.

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Catholic Healthcare Partners   **July 1999-Aug. 2009**
  - Created and upgraded Hyperion Enterprise applications for hospital reporting and consolidation.
  - Created a Visual Basic tool to copy organization-by-period structures between categories in Hyperion Enterprise applications via Hyperion API.
  - Did remote site installations and provided Citrix Metaframe support.

PROFESSIONAL EXPERIENCE – EMPLOYED (non-contract)
  - **LensCrafters Inc., Cincinnati, OH**   **Oct. 1995- Nov. 1997**
    Senior Manager, Financial Systems Department
    Managed department of 5, overseeing GL, AP, AR, Billing, and consolidations systems.
  - Key member of the team responsible for vendor analysis and vendor selection for the project to replace legacy financial applications.
  - Project Administrator for the implementation of Oracle financials (GL, AP, AR, FA, Purchasing, Project Costing, OLAP and workflow).
  - Personally responsible for the design, development and support of several financial, marketing and legal applications in Microsoft Access.
  - Other duties involved acting as liaison between the functional users and the IS department for special projects, as well as providing day-to-day application support.
  - Provided first line of customer response with regards to office automation, application and network support.

AT&T Global Information Solutions (NCR), Dayton, OH   **Feb. 1995 – Oct. 1995**
Technical Analyst, U.S. Area Financial Systems: World Wide Information Systems
  - Project leader for post-implementation of U.S. Area GL application.
  - Implementation involved conversion of historical data from legacy mainframe platform to Oracle database, as well as migration to new corporate account structure.
  - Also provide system support for Oracle GL and AP applications.
  - Coordinated user testing and certification for GL implementation.
  - Developed end-user query tools with links to desktop applications, providing Windows based investigation and reporting capabilities.
  - Created GUI tools for manipulation of GL hierarchy tables.
  - Coordinated development and testing of feeder system conversions to new GL format.
  - Led development and testing efforts for GL data extract, populating globally accessed data warehouse and feeding corporate consolidation systems.

Systems Administration: Corporate Controller's Division   **May 1994- Feb. 1995**
  - Primary responsibilities involved project leadership in the design, development and testing of Hyperion Enterprise applications.
  - Also provided technical guidance in the ongoing administration of current and historical systems. Functioned as the primary contact between GIS corporate organizations and Financial System Support during the development and maintenance of financial reporting systems.

Technical Specialist: Corporate Controller's Division   **Sep. 1992- May 1994**
Systems Administrator
  - Systems administrator of the division's Hyperion and Micro Control applications.
  - Duties included maintenance, support, and ongoing analysis for process improvement to consolidation and reporting systems propagated to over 75 offices worldwide.
  - Primary responsibility involved functioning as the liaison between the Finance and Information Systems teams, in the development and administration of all reporting applications.
  - Other administrative duties included local support of LAN access to the system, coordination of system update requests, process automation, and classroom instruction.

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➢ The position required strong knowledge of both system development and financial practices, as well as project planning, documentation, and training skills.

Teradata Corporation (El Segundo, CA   **June 1990- Sep. 1992**
Systems Analyst

➢ From January through September 1992, I was a key member of the merger team during the acquisition of Teradata by NCR .

➢ Primary responsibilities included coordination and development of the transition of Teradata financial reporting systems to NCR format.

➢ Prior to the acquisition, I was the sole implementer and administrator for the company's two financial databases.

➢ Personally installed the first system in several domestic and European subsidiary offices to serve as the means for world-wide consolidation and reporting of financial data.

➢ Conducted domestic and international training on reporting practices and applications.

➢ The second system was developed as a means of consolidating and reporting domestic department level financial data, temporarily replacing a failed GL implementation.

➢ Also developed and implemented a Microsoft Windows based Executive Information System which allowed for the presentation of selected financial information in a Windows based environment.

Kimberly Hall
Functional PeopleSoft Consultant

Summary:

Kimberly Hall is a Senior PeopleSoft Campus Solutions consultant with over twenty (20) years' experience in IT systems within the Public and Private sector, including fifteen (15) plus years of Higher Education experience, and fourteen (14) years within Oracle/PeopleSoft Campus Solutions suite of modules from the first public release, version 7.0, to the most current, version 9.0.

> ➢ Extensive experience providing PeopleSoft functional and technical leadership and support in the areas of project management, establishing and maintaining technical environments, system customization, conversion, interfaces, reporting, designing, developing functional and technical specifications, equation engine, fit gap, security, business process design, knowledge transfer, testing and providing quality assurance.

> ➢ Successful track record of meeting project deadlines and budgets by successfully managing scope and resources, transferring extensive knowledge and serving as mentor to project staff. Provide necessary documentation for management, steering committees, training, and status reporting, technical / functional specs. Mentoring includes leading training conference calls for fellow consultants and functional / technical client staff.

> ➢ Strong technical & functional backgrounds enable the ability to act as a liaison between the technical & functional clients. Technical specifications are designed with precision before released to the developer all the while functional specifications are written to the business audience. Minimal reliance on the IT department for debugging, troubleshooting or mod design.

> ➢ Worked closely with reporting teams to insure accuracy of statistics to state reporting agencies and legislatures for formula funding.

> ➢ Continually exceeds client's expectations during implementation / upgrade process with innovative solutions for University specific situations. Excellent reputation among upper management, fellow consultants and former clients.

Skills:

➢ Student Financials	➢ Tree Manager
➢ Campus Community	➢ Data Mover
➢ Business Process Design	➢ Security
➢ Conversion	➢ SQR/ SQL
➢ Interfaces	➢ Query
➢ Equation Engine	➢ PeopleCode
➢ Reporting	➢ Process Scheduler
➢ PeopleTools	➢ Crystal Reports
➢ Application Designer	➢ SQL+
➢ Import Manager	➢ COBOL

Professional Experience:

University of Colorado, Denver   **March 2013 – Present**

Functional Consultant w/ technical assistance: PeopleSoft 9.0 Post Go-Live Support

> ➢ The Collection module was never brought live. Demonstrated aspects of the Collection Module in order to be able to utilize the majority of delivered functionality to prevent major modifications.
> ➢ Designed a custom load process for Collector queues while leveraging remaining delivered functionality for communication building, tracking and exit processing.
> ➢ Designed an automated solution for the tedious manual maintenance of Third Party Contracts that utilize a Per Student Maximum.

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➢ These contracts must be closely monitored and the maximums changed upon enrollment changes or changes to a custom Stipend Amount Offset (COF).
➢ New process kept a simple approach while leveraging delivered processes to prevent an evasive modification.
➢ Conduct system review on long running processes such as tuition calculation in order to streamline.
➢ Reviewed Student Financials business processes and configurations for ways to improve system processing, data entry and reconciliation.

University Texas Southwestern Medical Center, Dallas   Nov. 2011 – Feb. 2013
Functional Consultant w/ technical assistance: PeopleSoft 9.0 Implementation
➢ Brought back to conduct testing of final configuration and cross train new SF Lead.
➢ However upon return found many areas not completed and other areas configured incorrectly.
➢ Simplified business processes and develop Business Process Documentation and Training Guides.
➢ Train UTSW staff.
➢ Conduct a complete review of all SF configurations and correct accordingly.
➢ Test all module areas including interfacing with Cybersource, Financial Aid, Student Records, Finance, Accounts Payable modules.
➢ Review and retest all modifications.
➢ Reduced the number of modifications by presenting unique delivered solutions. Eg Use of Service Indicators with Equations for Tuition Waivers to allow departmental rollout with built in Security

Areas that were not completed:

➢ GL Chartfield Configuration
➢ Cybersource Credit Card Processor
➢ Collections
➢ AP Single Vendor Refunding using Direct Deposit
➢ Item Type Security
➢ Payment Plans
➢ 3Cs
➢ Application Messaging
➢ Final Business Procedures not determined or documented, Training Guides not created

➢ Cashiering
➢ Third Party Contracts and Billing
➢ 1098T Cutover Strategy
➢ No Balance Forward Strategy – Legacy sunset
➢ Tuition Calculation – many student populations excluded, no lab or course fees, missing term fees
➢ Security Roles & Permission Lists – no security matrix

Areas corrected (build that happened after prototype)

➢ Item Type Tree – new nodes with overlapping numbers, FA 1098T and TPC nodes not done
➢ Tuition Calculation – incorrect term fees, waivers, calendars, tuition groups
➢ Student & TPC Billing – code was modified due to improper XML template design (broke most all delivered functionality) – removed all mods to restore to delivered

➢ Cashiering, Receipt Printing, Tenders & Targets
➢ All mods had to be redone – Health insurance, Promissory Note, e-Bill, Cashier Receipt XML, Student/TPC XML Templates, Subledger assign
➢ Aging
➢ Business Unit settings

Lone Star College System, Texas   March 2011 – Present
Functional Consultant w/ technical assistance: PeopleSoft 9.0 Implementation
➢ Brought on Post Go-Live to troubleshoot problems due to configuration errors.

> Lead efforts to streamline the tuition calc process which is running for 30 hours. Review all areas of configuration and make suggestions for areas that can be simplified or processing that can be improved. Provide knowledge transfer and training in every area of Student Financials.
> Help support and define business procedures within the SF module and with modules of integration (SR & FA)
> Areas of Problems: Charge Priority, Payment swapping rules, Item Type Tree, General Ledger, Third Party Contracts, Refunding, all areas of tuition calc.

Lorain County Community College, Ohio   Jan. 2010 – March 2011
Functional Consultant w/ technical assistance: PeopleSoft 9.0 Implementation

> Brought on 7 weeks prior go-live with SF module approx 40% complete. No knowledge transfer or integrated testing had taken place. Business processes not defined or documented.
> Conducted intensive prototype sessions to complete configuration for major needed processes in time for go-live.
> Prevented process failures by conducting review of configuration and made many foundation tables due to incorrect configuration. Monitored system post-go-live for data entry errors, built quality control queries, training, knowledge transfer, business process design, debug and troubleshoot.

Areas left not configured or unplanned:

> Cashiering and receipt printing
> Tuition Waivers
> Equations
> Org Billing
> Student Billing
> General Ledger
> Payment Plans
> Third Party Contracts
> Refunds
> 1098T
> Self Service payments
> Remaining SF Item Types
> Remaining FA Item Types
> App Messaging
> 3C
> ComGen
> Collections
> Item Type Security
> SF Row level security
> External file interfaces
> Balance forward strategy

> Reporting
> Business Process Design
> Pop Select-Update
> XML

Baseline configuration corrected:

> Business Unit
> AP Business Unit
> Tuition Calc Term Fees
> Payment Allocation Rules
> Adjustment Refund Calendars
> SF Term Default
> Age Sets
> Course / Class Fees
> Account Type Restructured
> Item Types
> Item Type Tree
> Tuition Groups

> Worked with IT to automate row level security for Self Service and staff User Defaults.
> Worked closely with the Finance team on a unique GL configuration utilizing both Term Fee & Class/Course Fee departmental allocation. Aided in reconciliation and documented the configuration of the GL at the Class & Item Type levels and the dependency on course configuration. Trained the Division Associates in the correct configuration of the Class & Course Fees which are being maintained by SR instead of SF.
> Conducted and aided training sessions for back office staff for Cashiering, Customer Account, Group Post, General Ledger. Documented procedures.

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➢ Non SF Items: Identified incorrect page level security access to display pages that contain drill down links and reported to the security team. Pages were all setup as read only when they must be configured as update. Correct type control configuration self service to display and allow edits to appropriate names, addresses, email, phone numbers. Trained in correct usage of the official residency page.

➢ Reviewed security matrix and identified security audit concerns and risks. Identified incorrect Academic Year configuration within Student Records. Identified misuse of Bio Demo changes to addresses impacting Student Refunds.

University Texas Southwestern Medical Center, Dallas   July 2009 – January 2010
Functional Consultant w/ technical assistance: PeopleSoft 9.0 Implementation Prototype

➢ Conducted prototype sessions and configuration documentation to support the build of a fully functional   prototype database (ADM, SR, FA & SF) with 13 of this universities most problematic student populations in addition to the standard student population. Conducted SF modular unit and full integrated testing. Conducted knowledge transfer sessions with SF lead. Documented configuration and business processes.

Southwestern Illinois College   April 2009 - June 2009
Functional Consultant w/ technical assistance: PeopleSoft 8.9 Post Go-Live Support

➢ Provide Bursar office support including daily / weekly processing
➢ GL Reconciliation
➢ Restructure Credit History Setup & Lead efforts to rebuild credit history tables
➢ Restructure and streamlined nightly batch job schedule
➢ Assistance technical team in testing bundles and modification design
➢ Review current setup for inefficiencies

Northern Illinois University   Oct. 2008 – March 2009
Functional Consultant w/ technical assistance: PeopleSoft 8.9 Post Go-Live Support

➢ Sought out by Oracle to organize and lead efforts to resolve post go-live issues from another organization's implementation. Analyze current setup and business processes, correct set up, design and document correction methodologies. Assist the technical team in the creation of correction scripts. Assist functional team in corrective data procedures. Implement solutions and proper business procedures and conduct knowledge transfer sessions. Identified and resolved the following Issues:

➢ Restructured the ITEM_SECURITY tree & charge priorities
➢ Improper set up payment allocation rules of Overall Payment Priority, Charge Priority and Payment Priority Payment Flags yielded in incorrect payment swapping and application of funds to wrong charges
➢ Streamline Tuition Calc processing resulting in 3 hours of time reduction
➢ Streamline account adjustments by eliminating manual credit & implementing negative charge functionality
➢ Excess waiver account functionality not working properly created invalid waiver calculation and posting to student account balances.
➢ Created Third Party Contract solution for Waivers
➢ Data errors replicated throughout the system into the Billing, Late Fee & Credit History Processes
➢ GL not reconciling
➢ GL timing setup incorrect
➢ Cashiering Over/Under GL setup incorrect
➢ Prevented incorrect Write Offs by identifying incorrect setup prior running
➢ Dunning Letters not producing properly due to incorrect setup
➢ Correct Term Fees
➢ SR utilization of Career, Program, Plan changes impacting Tuition Calc

➢ Improper set up tree nodes for 1098T processing
➢ Improper use of Collection Agreements – trained using Payment Plans
➢ Streamline Billing & Due Calendars to adhere to University policies
➢ Enhance Adjustment Calendars for Administrative drops
➢ Enhance Third Party setup for bill presentment
➢ Identified nightly processes for validation & maintenance not currently running
➢ Assisted tech staff in the design of custom Late Fee program
➢ Credit History / Aging set up incorrect

University of Texas Health Science Center San Antonio   **Jan. 2008-July 2008**
Recurring client - Functional Consultant w/ technical assistance: PeopleSoft 9.0 Upgrade
➢ Specifically requested to return to this University for their upgrade.
➢ Worked closely with Financial Aid & Admission/Student Record teams to insure smooth transition and flow of shared data.
➢ Jointly created timelines and implementation strategies for the entire Campus Solutions Suite. Facilitated weekly meetings to insure project timeline, deliverables and scope are being met and managed. Participated in integrated testing with formal scripts within all modules.
➢ Facilitated formal fit-gap sessions comparing functionality differences between v8.0-9.0. Evaluated and streamlined current business processes, automated manual processes, reviewed and reduced current system modifications by implementing 8.9/9.0 features: Equation Engine, Self Service Enhancements, Pop-Select & Pop-Update for: Service Indicator Maintenance, Student Group Maintenance, Mass Third Party & Payment Plan assignment, newly redesigned Collections, Letter Generator, newly enhanced Self Service.
➢ Reviewed current setup and streamlined processing of medical / dental students on an Academic Year vs. graduate students on a Term Calendar. Created equations utilizing personally recommended enhancements to the Equation Engine (see UTA) by creating class fee equations that calculate at the term level.
➢ Reduced modifications by creating equations to process tuition & fees for dual career students that follow both academic year & term calendars. Created new tuition calc structure to allow for specific waiver GL capturing. Streamlined tuition calc by eliminating duplicate unnecessary setup.
➢ Restructured charge priority / payment allocation for proper assessment.
➢ Created documentation including: Fit-Gap reports, New business process design diagrams, Technical Specifications, Functional Specifications, Decision documents, and Training Manuals.

College of Lake County, Chicago, Illinois   **May 2008**
Functional Consultant: Version 9.0 Upgrade Delta
➢ Organized and presented formal fit-gap and training sessions between v8.0-9.0 for both client and technical leads.
➢ Evaluate and streamline current business processes, automate manual processes and review and reduce current system modifications by implementing 9.0 features: XML implementation for Billing & Self Service 1098T, Pop Select & Pop-Update for Service Indicator Maintenance.
➢ Reviewed and corrected current set up that was initially implemented incorrectly which prevented delivered processes from running properly including: Modified the Item Type tree & Charge Priority to insure proper payment allocation. Corrected tuition calculation set up for term fees. Automated manual assessment of some fees by training staff on proper fee calc setup.
➢ Implemented Third Party Contracts.
➢ Created custom training and fit-gap report documents.

University of Missouri Kansas City   **Jan. 2007–Dec. 2007**
 Functional Consultant w/ technical assistance: Version 8.9 Implementation
➢ Insured project plan, deliverable milestones and scope are managed properly.

- ➢ Worked closely with Financial Aid & Student Records teams during Academic Structure Redesign, Alignment of Aid Year & Academic Year Calendars, payment allocation rules and insure the use of proper drop / withdraw rules.
- ➢ Facilitated detailed review sessions and completed the implementation of Self Service, Payment Plans & Third Party Contracts, Cashiering, Refunds, Billing, Group Posting, Tuition Calculation including Equation Engine, Item Type Security, GL & AP processing, Payment Allocation, Service Indicator Processing, Drop for Non-Payment Processing.
- ➢ Reviewed existing setup and corrected the following: tuition calc fee structure, item type tree, charge priority, GL and cashiering to insure proper flow of financial data and payment allocation of the student account to the General Ledger.
- ➢ Created equations using the Equation Engine to prevent modifications with the tuition calculation process. Used the equation engine to apply term specific waivers and term fees within the tuition calculation process.
- ➢ Performed unit & integrated testing and data reconciliation through the systems development life cycle. Validate converted data. Reconciled the General Ledger and A/R feed files.
- ➢ Created update scripts for the technical team to realign charge priority rules against student accounts.
- ➢ Created system documentation of Business Processes, technical and functional specifications, troubleshooting guides and training materials.

University of Texas at Arlington, Arlington, Texas   Jan. 2005–Dec. 2006
 Functional Consultant w/ technical assistance: Version 8.9 Implementation
- ➢ Worked with consulting teams to develop overall project plan, conversion strategies & implementation methodologies. Worked closely with the Campus Community / Student Records leads during the Academic Structure design phases to implicitly show dependencies within the Student Financials & Financial Aid modules.
- ➢ Managed technical resources to insure modifications were timely developed and tested.
- ➢ Worked directly with Oracle to debug and troubleshoot delivered 8.9 bugs within Equation Engine, Refunding, Third party Contracts, Billing and Tuition Calculation. Had direct input with the Oracle technical team on suggested enhancements to the Equation Engine that were adopted in the 9.0 release.
- ➢ Reviewed current business processes and recommended policy changes to leverage PeopleSoft delivered processes and reduce modifications.
- ➢ Conduct formal prototype sessions and documented any gaps. Held joint sessions with Financial Aid to insure proper Item Type setup and payment allocation. Held joint sessions with Student Records to insure proper drop & withdraw procedures are upheld for tuition calculation, drop for non-pay and dual career processing.
- ➢ Setup, tested & reconciled data through the entire Student Financials life cycle including Group Posting, Tuition Calculation including Equation Engine, Billing, Payment Plans & Third Party Contracts, Self Service, Cashiering, Refunds, AP & General Ledger interfaces, 1098T Tax Reporting and Collections, Item Type Security, Payment Allocation, Drop for Non-Payment processing.
- ➢ Equation Engine - Designed and developed a unique method of waiver processing by incorporating the newly released Equation Engine embedded within Tuition Calculation by leveraging the use of service indicators. Used Equation Engine to attach Third Party Contracts to the tuition calculation process for Texas Tomorrow funded students. Prevented modifications by leveraging the equation engine in complex fee calc structures.
- ➢ Developed: New business process design diagrams, Technical Specifications, Functional Specifications, Decision documents, Gap documents, and Training Manuals. Worked with training staff to develop UPK on-line training sessions.
- ➢ Worked with the Reporting team for Texas Coordination Board Reports for formula funding. Designed and developed a unique method of waiver processing by incorporating the newly released Equation Engine embedded within Tuition Calculation. Used Equation Engine to attach Third Party Contracts to the tuition calculation process for Texas Tomorrow funded students.

Corinthian Colleges, Santa Anna, California   **2004**
Functional / Technical Consultant: Version 8.0 Implementation
- Provided technical and functional support for the Student Financial module. Reviewed current modifications for validity. Restructured and corrected code by previous consultants.
- Redesigned a letter generation process for collections and financial aid to utilize the proper files and retrieve correct and current data. Incorporated several modifications into this process which previous consultants were unable to accomplish.
- Exceeded the client's expectations and thus was given permission by client management to question and correct programs and processes that were designed by her predecessors.

University of Texas Health Science Center, San Antonio, Texas   **Jan. 2004–Dec. 2004**
Functional / Technical Consultant: Version 8.0 Implementation - See above
- Insured project plan, deliverable milestones and scope were managed.
- Worked closely with Financial Aid & Student Records teams to insure the proper use of payment allocation and drop / withdraw rules and smooth transitions within integration points.
- Created technical specifications for the technical team and insured proper prioritization and development and timely delivery of modifications.
- Redesigned the Item type tree, charge priority & payment allocation including GL accounting. Reviewed and restructured the tuition & fee setup of term, class & course fees. Reconciled the General Ledger after payment plan realignment. Set up & tested Third Party Contracts, Payment Plans, Cashiering, AP Refunding, GL Interface and Group Posting. Validated AP, GL, 1098T tax data file interfaces.
- Created system documentation and training materials.

Envision EMI, Technical Consultant, Washington DC   **2003**
Functional / Technical Consultant: Version 8.0 Implementation
- Provided technical assistance with Crystal Reporting, queries, data conversion, data validation, test scripts, review and streamlined conversion scripts

Texas Christian University, Fort Worth, Texas   **1996-2003**
Technical Lead w/ Functional assistance: Version 7.0 Implementation, 7.5, 7.6, 8.0 Upgrades Recruited to this University to be the Technical Student Financial Lead for the initial implementation of the first generation of the PeopleSoft Student Administration modules. Remained technical lead for three subsequent upgrades.
- Responsible for managing timeline and scope during upgrades.
- Participated in prototype sessions and lent technical support where needed.
- Responsible for the application and installation bundles & fixes.
- Design and create modifications and custom reports.
- Create technical specifications, system documentation and training materials.
- Functionally and technically test all aspects of the SF module after every bundle application.
- Performed data conversion and validation.

Education:
- University of North Texas Bachelors of Business Administration, Business Computer Information Systems

Ade Jagun, PhD
Senior PeopleSoft Grants Functional Consultant

Summary:

Ade Jagun is a Senior PeopleSoft Grants Consultant with over sixteen (16) years of Grants implementation and upgrade experience. Ade is a Certified PeopleSoft Grants Functional Financial Expert and has expertise in Grants and Contracts Financial Management, Project Costing, Procurement, Purchasing, Pre-award and Post-award Grants Management; Federal Government Contract Process; PeopleSoft Business Process Analysis, and PeopleSoft User Training.

Skills:

➢ **Software Knowledge:** MS Windows, IFAS/Contracts, SPSS, SAS, MS Word, MS Excel, Contracts & Grants Software, QuickBooks, PeopleSoft Contracts and Grants Modules

Professional Experience:

ADD3 Corporation, Greenbelt, MD   **July 2011 to Dec. 2013**
CEO
Consulting with SAM Inc., College, MD (Corp-Corp)
Responsibilities: COO; PeopleSoft Grants Practice Lead, Program Management, Contracts Management
Implemented and Trained Personnel on 9.2

Consortium for Ocean Leadership, Washington DC   **Dec. 2010 to June 2011**
Senior Contract Specialist
➢ Assisted in RFP preparation (costing and pricing, contract clauses, special provisions, other flow-down provisions);
➢ Prepared/wrote of contracts/subcontracts – Indefinite Quantity Contracts, Firm Fixed Price, Fixed Price -Level of Effort, Cost Plus Fixed Fee, Cost Reimbursable, Time and Material, Consulting Agreements, Grant Agreements.
➢ Prepared and Analyzed Memorandum of Negotiation (MON) and Memorandum of Understanding (MOU); using applicable FAR clauses and other terms and conditions in the preparation of contracts;
➢ coordinated with engineers to determine the contents of RFP and subsequent contracts; requesting and receiving inputs from engineers in the preparation of contract documents; preparing modifications and interpreting terms and conditions of contracts;
➢ Negotiated terms and condition of contracts; closing out contracts; monitoring contract financial life cycle; using excel spreadsheets to setup pricing and funding as well as expense analysis; has excellent skills in MS Office programs – Word, Excel.

Northern Arizona University   **July 2010 to Dec. 2010**
PeopleSoft Grants Consulting installed Pre-Award/Post Award
➢ Held meetings and interviews with stakeholders to gather and define 'AS IS' grant management process
➢ Developed Work Plan for Project with timelines
➢ Understudied existing grants legacy system ('AS IS')
➢ Designed Business Process Analysis (BPA) Questionnaires for Pre and Post Award Processes
➢ Collected and analyzed responses from the BPA Questionnaires
➢ Held meetings with stakeholders to discuss/clarify responses to questionnaires
➢ Drafted 'TO BE' Business Requirements
➢ Organized Fit Gap sessions to agree on Grant Management Requirements with stakeholders
➢ Prepared and distributed notes on Requirements

- Undertook Software configuration
- Identified business process modifications
- Designed Workflow for Proposal Component Approval Process
- Designed Grants Milestone Approval Process
- Designed document creation
- Prepared Test scripts identification/execution
- Prepared End-user training development and execution
- Completed and presented alternative complex system-related analyses
- Prepared and presented recommendations as deliverables
- Suggested approaches and solutions for solving various grant management process problems
- Contributed to strategy through participation in numerous internal work groups and committees

Paul & Thecla Personal Care Homes, Inc   **Sep. 2007 to June 2010**
President/CEO
- Full Implementation, PeopleSoft Grants management System
- Used PeopleSoft Grants Financial to manage operational and financial aspects of contracts and grants.
- Analyzed and interpreted contracts and grants accounts/budgets and agreements.
- Determined expense items in line with sponsor's terms and conditions
- Monitored contracts and grants operational management
- Modified budget and set up internal controls
- Prepared and generated reports per award's status
- Initiated and prepared closeout of expired awards
- Performed financial analysis of expenditures
- Contacted sponsors and negotiated amendment of awards' terms and condition
- Administered subcontracts
- Prepared federal grant financial reports – SF 272 (FCTR), SF 269, SF 270 etc.
- Monitored expenses per OMB circulars and GAAP
- Interpreted OMB A-122.A-133
- Trained users in PeopleSoft financials modules.

State of Delaware   **Nov. 2006 to Sep. 2007**
Senior PeopleSoft Grants and Contracts Functional Financial Consultant
- Contracts Module Lead/Contracts and Grants Management Team
- Set up grant budget and cost centers
- Trained State counterparts on budget implementation and monitoring
- Implemented PeopleSoft Financials (Grants) in state government and higher education institutions
- Trained staff on grant/contracts module functionalities; audit requirements and compliance
- Developed grants business analysis questionnaires for both Pre and Post Award processes
- Conducted Business Process Analysis of 'AS IS' and 'TO BE' Pre and Post Award Processes
- Conducted Fit Gap sessions to show whether or not IT solutions and software would fulfil all requirements
- Prepared Grants Configuration Documents
- Configured grant tables
- Reviewed legacy systems extensively meeting with stakeholders for clarifications
- Prepared Grants Prototype scripts for testing software capabilities
- Conducted grants management modules testing
- Recommended best practices for grants management

Florida A & M University   **May 2006- Nov. 2006**
PeopleSoft Grants and Contracts Functional Financial Consultant
- Implemented PeopleSoft Financials (Grants) in academic institutions

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45

- Trained staff on grants module application and functionalities and audit requirements and compliance
- Developed grants business processes
- Conducted Business Process Analysis
- Conducted Fit Gap sessions
- Prepared initial grants configuration documents
- Configured grants tables
- Trained users on grants management financial analysis
- Reviewed grants legacy systems
- Prepared Grants Prototype scripts
- Conducted grants testing
- Prepared Grants Business Process Documentation
- Trained grants management staff on the use of grant management process

University of Maryland   **Sep. 2003 to April 2006**
Senior Grants & Contracts Accountant (SME)
- Used PeopleSoft Grants Financial to manage operational and financial aspects of contracts and grants.
- Analyzed and interpreted contracts and grants accounts/budgets and agreements.
- Determined expense items in line with sponsor's terms and conditions
- Monitored contracts and grants operational management
- Modified budget and set up internal controls
- Prepared and generated reports per award's status
- Initiated and prepared closeout of expired awards
- Performed financial analysis of expenditures
- Contacted sponsors and negotiated amendment of awards' terms and condition
- Administered subcontract
- Prepared federal grant financial reports – SF 272 (FCTR), SF 269, SF 270 etc.
- Monitored expenses per OMB circulars and GAAP , FAR

National Academy of Sciences, Washington DC   **June 2001 to Aug. 2003**
Staff Accountant (Grants and Contracts)
- Drafted, prepared and analyzed financial reports
- Billed, collected and monitored revenue from sponsor
- Modified and analyzed budget and expenditure of awards and contracts
- Set up cost centers in line with Policy and Procedure Manual
- Monitored expenditures in line with policy and procedures
- Prepared and Interpreted financial/budget/fiscal reports
- Served as liaison with sponsors, ensured compliance with grants'/contracts' financial requirements
- Organized and participated in meetings
- Used budget/financial software such as IFAS on HERC and CDD, MS Excel in the preparation of reports
- Closed out government and private awards/contracts in line with sponsor terms and conditions
- Managed and responsible for awards amounting to about 20 million dollars
- Audited financial and expenditure reports
- Participated in the negotiation of awards
- Administered subcontracts
- Prepared federal grant financial reports – SF 272 (FCTR), SF 269, SF 270 etc.
- Monitored expenses per OMB circulars A-122/A-133 and GAAP

National Academy of Sciences, Washington, DC   **Sep. 2000 to June 2001**
Grants Closeout Specialist
- Closed out government and private grants and contracts

46

- ➢ Participated in the negotiation of grants/contracts
- ➢ Prepared government financial reports such as SF 269, 270, 272 etc.
- ➢ Generated financial reports using IFAS on Herc and CDD software and MS Excel
- ➢ Analyzed budgets and financial reports in line with grants/contracts agreements
- ➢ Used IFAS, CDD and Excel spreadsheet in the analysis of budget
- ➢ Served as liaison with government and private agencies in the fulfillment of grants/contracts financial requirements

Education:
- ➢ Rensselaer Polytechnic Institute
  - o PhD (Urban-Environmental Studies), Troy, New York
- ➢ Boston University, Boston, MA
  - o Master of Urban Affairs(Grantsmanship)
- ➢ University of Massachusetts, Dartmouth, MA
  - o B.A. Political Science,

Certification:
- ➢ Certified Oracle/PeopleSoft Grants Functional Specialist

Seth Earnhardt
PeopleSoft Functional Analyst

Summary:

Seth Earnhardt encompasses over seventeen (17) years with roles as a functional lead and technical developer of PeopleSoft specific applications. Seth's exposure to PeopleSoft is diverse including the following modules: GL, OM, PO, AR, AP, IN, BI, PC, MFG, PLN. His accomplishments include the development of many applications via PeopleTools, nVision, Crystal, various interface packages and SQR. Seth has completed six full life-cycle PS FSCM implementations with versions 5.1, 7.0, 7.5, 8.4, 8.8 and 8.9. Currently, he is involved as an AP functional lead assisting with post production support in an 8.8 implementation and fit gap analysis for 9.2 conversion.

Skills:

➢ **Software/Languages:** PeopleSoft 5.1, 7.0, 7.5, 8.0, 8.4, 8.8, 8.9, 9.2 All Microsoft Applications, TSO, Composer, C, Easytrieve, JCL, SQL, SQR, BASIC, COBOL / II, CICS.

Professional Experience:

GAF Materials Corp   **March 2009 - Current**
Functional Analyst
  ➢ Designed, implemented and supported EDI auto vouchering process for multiple vendors and 100s of daily 810 transactions.
  ➢ Redesigned drop ship process to streamline processing and eliminate customization.
  ➢ Provided support for pricing, billing, supply chain and edi for daily issues while designing fixes for long term solutions.
  ➢ Assisted in designing long range companywide ERP strategy for upgrading a highly customized environment to PS version 9.2.
  ➢ Performed partial fit gap analysis for P2P modules and future re-implementation of version 9.2.
      o ePro - enhancements include transparent punchout, req price adjustment visibility, secure enterprise search enhancements, overall usability improvements, req chunking and mobile approvals / eProcurement
      o AP – enhancements include AP dashboard, supplier history, matching history, GLN for healthcare, invoice entry and voucher inquiry simplification, TIN validation, receivables integration, attachments, payables workcenter and AM integration.
      o PO – enhancements include user definable fields, supplier registration, auto numbering options, split PO by ship to, mobile approvals, buyer workcenter.
  ➢ Recommended various approaches to utilizing delivered PS functionality and reducing the desire to consistently customize areas which was not necessary.
  ➢ Involved in developing and supporting multiple interfaces to third party software packages to and from PeopleSoft.

Fairview Health Services   **Aug. 2007 – Feb. 2009**
Functional Lead version 8.9
  ➢ Primary module responsible for – AP Secondary PO, ePro
  ➢ Assisted in resolution of various issues stemming from incorrect initial configuration.
  ➢ Worked closely with Supply Chain and Finance employees assisting in daily processing for $1+ Billion in transactions.
  ➢ Provided direction and troubleshooting for 810 invoices.
  ➢ Eliminated unnecessary customizations within a heavily customized environment.

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48

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- ➢ Corrected withholding configuration for all converted vendors. Created and executed plan to extract accurate withholding data prior to sending to 3rd party 1099 firm.
- ➢ Developed functional / technical design documents for MySpend analysis and voucher workflow approval.
- ➢ Paired issues with existing fixes from PS and resolved via application of patches.
- ➢ Worked extensively with finance in cleaning up skewed financial data stemming from inaccurate receipt accrual.
- ➢ Revamped existing match rules ensuring accurate payment of vouchers.
- ➢ Provided various reporting tools enabling efficient resolution of match rules while taking advantage of discounts.
- ➢ Processed various payments via Financial Gateway.
- ➢ Reconfigured bank statement accounting rules and assisted users with daily processing of reconciliation files.
- ➢ Provided training to FTEs in software functionality and efficient issue resolution.
- ➢ 9.0 Upgrade Analysis / Initiation
- ➢ Recommended upgrade to 9.0 vs application of many missing bundles due to timing and highly customized environment.
- ➢ Initial discovery from release notes of major differences between 8.9 and 9.0 pertaining to Finance and SC Modules.
- ➢ Assisted in configuration of 9.0 Demo environment.
- ➢ Walkthrough for users in 9.0 Demo environment.
- ➢ Aided in creation of a high level project plan for estimation of time and cost for upgrade.

Green Mountain Coffee Roasters   **Sep. 2006 – Aug. 2007**
Project Management / Functional Lead version 8.9
- ➢ Primary modules responsible for – AP, PO Secondary – MFG, Planning
- ➢ Lead initial discovery sessions outlining major differences in existing version 8.0 and 8.9.
- ➢ Coordinated and executed fit gap sessions producing thorough fit gap documents.
- ➢ Developed functional and technical design documents to supplement existing documentation and satisfy Sarbanes Oxley requirements.
- ➢ Aided in completion of the technical development phase for a variety of customizations.
- ➢ Replaced a variety of robots developed in house with delivered functionality i.e. voucher upload process.
- ➢ Developed and aided in execution of both unit and system test scripts while managing and fixing problems as they occurred.
- ➢ Managed users and tasks for my respective areas via MS Project and Sharepoint.

The Doe Run   **Sep. 2005 – Sep. 2006**
Project Management / Functional /Technical Lead version 8.8
- ➢ Primary modules responsible for – AP, PO, IN
- ➢ Redesigned project scope, resource allocation, project timeline for failed initial lab implementation.
- ➢ Developed tracking and update system for proper procedural resolution of issues.
- ➢ Developed and implemented efficient change management procedures for internal external object modifications and patch applications.
- ➢ Aided in structuring a project repository for implementation documents.
- ➢ Provided procedures and test script examples for unit and integration testing.
- ➢ Designed and coded various required system modifications.
- ➢ Designed and implemented amount and chartfield workflow approval based off of AS400 specs.
- ➢ Provided 2 months of post go-live production support.

Premiere Global Conferencing   **May 2004 – Aug. 2005**
Project Management / AP, PO, Workflow Team Lead version 8.8

Phase I
- ➢ PO lead for multi business unit, multi setid, multi system configuration, SUN and PMX. Project was a reimplementation of version 8.8 including all phases of the SDLC.
- ➢ Redesigned workflow approval system and eliminated previous major customizations.
- ➢ Directed vendor conversion efforts for 5k vendors coming from fragmented systems.
- ➢ Configured, created test plans, scripts, rollout plans including training and production support.
- ➢ Phase required coordination of 30 person team distributed across 4 locations in the U.S.

Phase II
- ➢ AP and PO lead for international phase including 7 European and 7 Asia nations.
- ➢ Configured all aspects of AP and PO for multi-currency, multiple setids and multiple business units. Multiple check, eft, and draft formats along with varying disbursement and vendor bank accounts.
- ➢ Redesigned workflow process to accommodate varying currencies, 11 approval levels and routing by deptid.
- ➢ Managed vendor conversion effort for all legal entities involved.
- ➢ Aided in VAT configuration and complicated withholding setup.
- ➢ Phase required coordination of 35 person team throughout EU and Asia along with extensive international travel.

Draper Laboratories – Division of M.I.T.   **Dec. 2003 – April 2004**
PO, eProcurement Workflow Team Lead version 8.4
- ➢ Developed workflow routing solution for approval of ePro requisitions.
- ➢ Custom queries developed enabling proper routing based upon client's approval hierarchy.
- ➢ Approval routing based upon a combination of role level, item category, and requisition amounts.
- ➢ Additional rules added for parallel routing of notifications along with worklist routing.
- ➢ Developed SQR to automate route control assignment based upon project team members and their associated roles.
- ➢ Provided technical guidance for minimizing unnecessary customizations.
- ➢ Developed PO workflow approval solution involving 8 levels of approval.
- ➢ Modified POPO005 SQR to reflect desired client images and data.

Carolina's Medical Center   **Oct. 2003 – Dec. 2003**
General Ledger / Accounts Payable Co-Team Lead version 8.0
- ➢ Provided support for data conversion of 5 newly acquired hospitals and care centers.
- ➢ Verified configuration for newly added business units in AP and GL.
- ➢ Developed comparative and current period nVision income statements and balance sheets (12 total) for all new business units.
- ➢ Modified and executed test scripts ensuring system and data integrity.
- ➢ Developed SQR interface for loading PeopleSoft ledger data into external budgeting system.

Duke / Fluor Daniel   **July 2002 – Aug. 2003**
Accounts Payable / Purchasing Functional & Technical Lead, version 8.4
- ➢ Facilitated management and end-user meetings for configuration and design requirements gathering. Developed business process design and configuration design documents for the AP and PO modules.
- ➢ Converted existing vendor master file of 3k vendors and uploaded into PeopleSoft's 26 corresponding vendor tables.
- ➢ Setup all applicable configuration points and tables including business units, pay cycles, 1099 processing, vendor conversion, matching, reconciliation, reporting, chartfield inheritance, etc.
- ➢ Created various testing scripts for execution of independent processes within respective modules, integration to subsequent modules, and overall batch testing.
- ➢ Aided in structuring and implementing security design and solution.

➢ Mentored PWC / IBM consultants along with in-house developers on best practices for code development utilizing PeopleTools, SQR, and overall structure of Oracle DB objects.
➢ Aided in evaluation of all PeopleSoft fixes / patches including implementation and testing.
➢ Provided overall post go-live support for all modules and external PeopleSoft objects.
➢ Maintain SAP interface for Project Costing along with developing and enhancing additional reports and processes as needed.

The Allegis Group   **Jan. 2002 – July 2002**
Technical Financials Upgrade Analyst, version 8.0
➢ Created detail design documents developed from fit / gap analysis to reduce existing customizations.
➢ Re-Implemented required billing customizations for 8.0 including heavily modified invoicing and imaging. Development included the design of application software components, including programs, pages, reports and various other PeopleSoft objects.
➢ Facilitated design and code reviews requiring sign-off from project management.
➢ Created and executed unit test scripts for various processes. Test plans included scope definition, creation of data, testing and debugging also requiring management sign-off.
➢ Provided management with formal presentations of process changes for knowledge transfer.
➢ Aided in configuration of projects and contracts modules for accurate transfer of data to billing.
➢ Created various test data sets within contracts for interfacing into billing.
➢ Utilized existing functionality within Contracts for data entry alleviating duplicate data within Projects for amount based invoices. Prevented the need for an approximate 500 invoices per month to be generated manually.

United Space Alliance   **April 2001 – Oct. 2001**
Technical Procurement Upgrade Analyst
➢ Assisted in completion of fit gap development for procurement upgrade to 7.5.
➢ Re-implemented and streamlined Peoplecode customizations from 6.0 to 7.5.
➢ Modified requisition print and vendor contract processes to appropriately reflect customizations.
➢ Converted over 70 in house Crystal reports along with modification to associated queries. All associated objects for panel access were also modified and upgraded.
➢ Modified in house interfaces to reflect customizations and properly convert and load requisition data into IPCS

RPC   **Jan. 2001 – March 2001**
Technical GL/AR/AP Analyst
➢ Aided in development of complete preventive maintenance reporting process. Process enabled field workers to better track and schedule routine maintenance for oil rig machinery.
➢ Created various iterations of GL Activity reports along with Peoplecode driven panels for execution.
➢ Enhanced performance of existing reports by adding indexes to various tables and creating more efficient views.
➢ Modification of various BI and AR reports to correctly reflect data.
➢ Reduced the number of AP checks to one eliminating the need for separate checks for each subsidiary. Appropriate logos are printed based on business unit eliminating the need for pre-printed check forms.

Kaplan Companies   **Jan. 2000 – Oct. 2000**
Production Support Specialist/Technical Distribution Lead
➢ Implemented delivered PeopleSoft credit card authorization/settlement process involving Cybersource.
➢ Created bank reconciliation process through customized panels, new SQR creation, and customization of existing code.

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➢ In addition to delivered process, created customized interface for both authorization and settlement processes in anticipation of alienation of NT server. Customized interface achieved processing through use of third-party software IC Verify.
➢ Created several SQR procedures for data manipulation including a process to decrypt all encrypted credit card numbers for appropriate processing in customized interface.
➢ Developed all testing procedures and verification for credit card authorization / settlement processes.
➢ Acted as production support specialist and focused on troubleshooting an array of problems within the AR, AP, and BI modules. Utilized tools such as Application Engine, Application Reviewer and various customized log files for problem solving.
➢ Provided purchasing group with various SQRs enabling reduction of backorders for order management.
➢ Provided production support for problems within other environments as needed.
➢ Aided in transition from SQL Server to Oracle RDBMS. Required optimization of existing processes including SQRs, queries, and application engines.

Wake Forest University Baptist Medical Center
Functional/Technical Purchasing/Asset Management Lead   Feb. 1999 – Nov. 1999
➢ Created panel work around as substitution for full inventory implementation.
➢ Panel process enabled users to track received items through various stages of installation.
➢ Coded SQR to mass update status of installed items based on project id.
➢ Images of all surplus items were loaded into PS for online viewing.
➢ Process enabled surplus items to be tracked and maintained.
➢ Total process created loss prevention and eliminated redundant item orders reducing total costs by 100%.
➢ Responsible for individual customization of sqr form.
➢ Interface was written to load mainframe extracted flat files for asset management into PS.
➢ Modified transaction loader process to successfully turn staging data into assets.
➢ Created building/floor conversion with cross-reference of current building numbers with PS generated building codes.
➢ Restructured speedchart creation and utilization.
➢ Provided various new and modified sqr programs to provide end users with accurate information.
➢ Responsible for creating a variety of security classes and groups for security solutions.

Summa Healthcare
Technical Purchasing Reference   Sep. 1998 – Jan. 1999
➢ Provided supplemental SQR support for a major firm within the healthcare industry.
➢ Created in depth accrual reports utilizing SQR.

Wellman Inc.   Dec. 1997 – Sep. 1998
A/R - G/L Reporting/Financials Developer
➢ Served as A/R support developer in addition to being the General Ledger reporting lead. Responsible for developing all of the PeopleSoft 7.0 peopletools applications and reports for one of the world's largest polyester and recycling companies.
➢ Performed analysis of existing business structure for best fit into PeopleSoft A/R, including creation of new business units.
➢ Created and implemented various modifications to underlying document sequencing process for more appropriate fit.
➢ Produced an array of queries and reports utilizing all data within A/R providing management with information to which they were used to accessing.
➢ Created various customized inquiry panels and queries replacing the current reporting system within G/L for department heads. .

- Aided in analysis, planning and development of PeopleSoft end user security solution, including the creation of all user groups.
- Created tree structures for accounts, departments, and products through Tree Manager.

Lowe's Companies   **June 1996 – Dec. 1997**
PeopleSoft Analyst/Developer

- Served as PeopleSoft Query and nVision instructor for in house training of management. Developed tailored course curriculum for PS Query, Crystal, and nVision classes.
- Created PeopleSoft test scripts utilized in functional stress testing for 20 – 30 users.
- Designed and implemented PeopleSoft Query based reports for replacement of existing CICS inquiry screens.
- Developed queries based on customized views.
- Modified existing COBOL General Ledger interfaces, along with providing new code necessary for implementation of PeopleSoft General Ledger.
- Created and modified various other mainframe COBOL applications

Education:

- Appalachian State University
  - Bachelor of Science in Business Administration May 1996
  - Major: Computer Information Systems

Certifications:

- PeopleSoft 8.0 navigation course and certification for
- PeopleTools 8.12 attained November 2001.
- PeopleSoft 8.4 workflow certification attained January 2004.

Juan Covas
Sr. Functional PeopleSoft Grants Consultant

Summary:

Juan Covas is a senior PeopleSoft Functional consultant that has over seventeen (17) years' experience in research administration and has worked in multiple facets of the research life cycle. He was a key member in the implementation of the PeopleSoft 9.0 Grants Suite at Florida International University. Juan was responsible for creating business processes documentation and developing training materials. He conducted the majority of the training courses that he developed to the Grants Managers within the Division of Research. Juan currently has a key support role in troubleshooting and maintenance of the recently implemented PeopleSoft 9.0 Grants Suite which included the Grants, Projects, Billing, Accounts Receivable, and Contracts modules.

Skills:
- PeopleSoft 9.1 Grants Suite (Accounts Receivable, Billing, Contracts, Grants, and Projects modules)
- PeopleSoft 9.0 Grants Suite (Accounts Receivable, Billing, Contracts, Grants, and Projects modules)
- PeopleSoft 8.45 Financials (General Ledger, Travel and Expense, Commitment Control, Allocations, Tree Manager

Professional Experience:

Northern Arizona University   **Nov. 2013 - Present**
PeopleSoft Grants Consultant
- Support post go live Billing and Accounts Receivable modules
- Created queries to support Post Award office invoicing processes
- Produced configuration documents for the five grants modules
- Created business process documents for award set up, invoicing, receivables, and all required system modifications.
- Provided training in post award business processes and award closeout.
- Provided support to the Controller's office in the journaling processes created by the Billing and Receivables updates.
- Updated Indirect Cost capture allocations to send revenue to both Research office and the appropriate Dean's offices.

HighPoint Consulting Group   **Aug. 2012 – July 2013**
Consultant
- Worked in house on product development team for the production of a phone application for PeopleSoft Grants
- Worked with Product Director and Developer to refine design of financial mobile pages
- Worked with the Product Designer on designing the workflow requirements for the Grant mobile applications
- Create Test scripts for Financial module products.
- Create reports, SQL queries.
- Create training documents for using products.

Huron Consulting Group   **Oct. 2010 - April 2012**
Associate

- ➢ Served as Functional Specialist for five PeopleSoft Financials Grant modules (Accounts Receivables, Billing, Contracts, Grants, and Projects modules.) for the Children's National Medical Center in Washington, DC.
- ➢ Facilitated business requirement, design, and configuration sessions.
- ➢ Created reports, SQL queries, and training documents to facilitate organizational transition.
- ➢ Analyzed post production data and cleaned up the PeopleSoft Financials Grant modules.
- ➢ Facilitated many of the business process modification sessions, helping map essential business processes and conducted fit/gap sessions for required and existing processes, including Clinical Trials.
- ➢ Implemented configuration based on the information gathered in the Grants, Projects, and Contracts, Billing, and Receivables modules.
- ➢ Participated in the development of reports and SQL queries to support conversion validation and on-going production reporting needs.
- ➢ Assisted in the creation of training guides and job aides for the Sponsor Projects department to assist the client learn how to use and then conduct the daily business functions.

Florida International University   **Oct. 2008 – Oct. 2010**
Assistant Director, University Computer Systems, Division of Research
- ➢ Handled maintenance and troubleshooting of the accounts receivable, billing, contracts, grants, and project modules.
- ➢ Created and maintained business processes the Post Award office requires within the five Grant Suite modules.
- ➢ Worked with application developers to provide solutions that meet the needs of the users and database and security administrators to update and maintain critical functions to the Grant Suite and its users.
- ➢ Provided training for new services created for the Post Award group or University community at large.
- ➢ Created business processes documentation and developed training materials and conducted the majority of the training courses he developed to the Grants Managers within the Division of Research.
- ➢ Key support role in troubleshooting and maintenance of the recently implemented PeopleSoft 9.0 Grants Suite which included the Grants, Projects, Billing, Accounts Receivable, and Contracts modules

Florida International University   **Mar. 2004 – Oct. 2008**
Senior Business Analyst, University Technology Services
- ➢ Handled all of the university's expense, travel and grants modules within the PeopleSoft Financial system.
- ➢ Worked closely with the Controller's Office and the Office of Sponsored Research Administration to maintain and create solutions for new service requirements, those services include the university Procard (credit card) system, university travel, and the administration of financial transactions for grants, including contracts, awards and projects for both faculty and students.
- ➢ Worked with application developers to provide solutions that met needs of the users.
- ➢ Worked with database and security administrators to update and maintain critical functions.
- ➢ Provided training for new services created for the university community.

Florida International University   **May 2000 - March 2004**
Assistant Director, Metropolitan Center, College of Health and Urban Affairs
- ➢ Assisted with the oversight of both the Florida Institute of Government and the Metropolitan Center in the College's downtown Miami location.
- ➢ Assisted with the yearly budget process for both centers and maintained the budget throughout the year.

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55

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➢ Obtained training contracts worth $2 million a year and was responsible for a local government-training center.
➢ Worked with many organizations to develop business process flow charts, change management processes and develop training around new business requirements.
➢ Conducted training sessions whenever needed.
➢ Became a resource for faculty members involved in outreach with local government and non-governmental agencies within the tri-county area.
➢ Administered the proposal process for the Center and was the primary contact for the Center with the Office of Sponsored Research Administration.
➢ Involved in negotiating contracts with local governmental and non-governmental agencies.
➢ Supervised a staff of six and assisted director of center with administration of undergraduate and graduate assistants.

Florida International University   **July 1993 - May 2000**
Assistant Director, Division of Sponsored Research and Training
➢ Responsible for the database program used to collect all sponsored programs information.
➢ Facilitated the maintenance of the database servers with the Information Technology group.
➢ Transitioned the University from a customized database system for collecting proposal and grant information to a more robust online system provided by a large vendor.
➢ Helped University faculty with the proposal process and submission of contracts and grants from granting agencies.
➢ Facilitated contract discussions between the University's General Council and outside agencies for the University when a faculty proposal was accepted by an agency.
➢ Administered the Sponsored Research indirect cost account and a research seed program begun by the Vice President for Research.
➢ Began database systems to maintain proposed time and effort information, human and animal subjects' approvals, and research space issues given to the Sponsored
➢ Research office by the faculty at time of proposal submission and awarding of a contract.

Education:
➢ Florida International University
  ○ M.S. in Adult Education and Human Resource Development   2001
  ○ B.A. in History and Philosophy   1993

Jay Riffe
Functional Lead

Summary:

Jay Riffe has over fifteen (15) years' experience as a functional consultant on PeopleSoft's Human Capital Management (HCM) suite. In recent years, has become an expert in the Talent Management suite such as: Talent Acquisition Manager & Candidate Gateway; ePerformance; Profile Management; eCompensation Manager Desktop; eBenefits; and how Position Management affects the various modules.

- Proven ability to enter an environment, develop user requirements and discover opportunities for improvement through the use of system solutions based on the client's needs.
- Specialist in human resource skills tracking and management applications, specifically PeopleSoft HCM Collaborative apps. Participated in several implementations and upgrades in various industries including Higher Education, Public Sector, Healthcare, and Manufacturing.

Skills:

- **ERP Applications:** PeopleSoft Human Capital Management 9.1, 8.9, and 8.8; Talent Acquisition Manager and Candidate Gateway 9.1, 9.0, 8.9, 8.8, and 8.3; eCompensation Manager Desktop 9.1, 8.9, and 8.8; Profile Management 9.1, ePerformance 9.1, 9.0, 8.9; Position Management; eProfile (ESS); eBenefits, and ePay.
- **Recent Training:** Recruiting Solutions 9.1, ePerformance 9.1, Manager Desktop 9.1, Position Management 9.1 Implementation Considerations for eRecruit, eProfile, eBenefits, ePay, and eCompensation

Professional Experience:

Market Leader in Specialty Consumer Finance   **June 2013 – Present**
9.2 Talent Management Functional Lead

Lead Recruitment through Fit/Gap and functional analysis focused on the new application features delivered between 9.1 and 9.2. Fit/Gap and functional analysis will focus on application features the company is targeting for implementation, including the pursuit to remove much of the existing customizations and complex configuration in favor of leveraging more delivered functionality.

- Configure and maintain configuration of PeopleSoft Recruiting application and Position Management. Compose and update Configuration Guide.
- Develop and execute a data validation routine for the control and transactional data converted through the upgrade pass process.
- Develop detailed test plan and scripts which will cover Unit Testing, System Testing, Integration Testing, and User Acceptance Testing Phases. Participate and lead the testing phases for the PeopleSoft Recruiting application.
- Compose Functional / Technical Specifications for customizations deemed to be required. These specifications are expected to be complete functional designs bordering on the technical; they are composed with adequate detail to ensure that they are actionable by the project's developers.
- Led Fit/Gap Assessment for the Profile Management and ePerformance 9.2 modules.

The Church of Latter Day Saints   **Feb. 2013 – June 2013**
Functional expert in 9.1 Talent Management products & Candidate Gateway for a PeopleTools 8.52 Upgrade

- Tasked with taking the list of business requirements and writing functional specs and configuring the application to meet the needs of the business.
- Developed User Stories to document and link business requirements together using MS Team Foundation Server 2012.

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- ➢ Manager wanted to keep things as vanilla as possible so the consultant had to be comfortable in suggesting changes in business processes where needed.
- ➢ In addition to doing the configuration, the client looked for the consultant to help with training and best practices, including the implementation of Position Management and Persons of Interest and how they affected Talent Management processes.
- ➢ "Go-to" functional resource for this project: the client viewed this as complete reimplementation of the product and tried to add new functionality; the consultant helped with these decisions.

K-12 City School District in the Midwest   **Jan. 2013 – March 2013**
9.1 Talent Management Functional Lead
- ➢ Provided all functional and semi-technical knowledge related to 9.1 PeopleSoft TAM applications to the project team.
- ➢ Provided practical 9.1 Self-Service expertise based on prior direct experience in designing and deploying the product functionality in complex, large scale environments.
- ➢ Assisted, as needed, the business analyst, security administrator, and information architect to perform their duties as it related to the TAM/CG implementation.

University of Florida & Shands   **June 2012 – Jan. 2013**
9.1 ePerformance and Talent Management Functional Consultant
- ➢ **Analyzed** and made **recommendations** regarding **ePerformance** and **TAM/CG** configuration using Profile Management, templates, customizations, and security to meet the client's business requirements in PeopleSoft 9.1.
- ➢ Configured Profile Management to use Content Items in Performance Review documents and applicants online job applications.
- ➢ Configured Document Templates, Section and Template Definitions, and Performance Criteria for ePerformance.
- ➢ Configured Resume, Screening, Job Posting, Job Opening, and Recruitment templates to meet university's healthcare business requirements.

International Food Retailer along the East Coast   **Feb. 2012 – June 2012**
9.1 Manager & Employee Self-Service and Talent Management Lead
- ➢ Reviewed current state operating environment to remediate issues in 9.1 for Manager & Employee Self-Service and implement Profile Management, ePerformance, and Talent Acquisition Manager/Candidate Gateway (TAM/CG).
- ➢ Worked with client to identify areas for process improvement through configuration, business process redesign and workflow.
- ➢ Created Assessments for each of the aforementioned modules as well as a Release Calendar and Project Plan for remediation.

Public Transportation Service Company   **Nov. 2011 – Feb. 2012**
9.1 Talent Management Lead
- ➢ Reviewed current state operating environment for an upgrade from 8.8 to 9.1 and worked with client to identify areas for process improvement.
- ➢ Created Business Process Descriptions and Flows for "Current State" and "Future State" definitions.

PeopleSoft training   **Oct. 2011 – Jan. 2012**
9.1 Training Lead
- ➢ Teaching and developing educational course materials for 9.1 Recruiting (TAM/CG), ePerformance, eProfile & eProfile Manager Desktop, eComp & eComp Manager Desktop, ePay, eBenefits, eDevelopment, and Position Management.

Major University in the Southeast   **Sep. 2011 – Oct. 2011**

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9.1 ePerformance and Talent Management Functional Lead
- Demonstrated and recommended best-practice business processes for ePerformance, TAM, and Profile Management.

University of Phoenix   **July 2011 – Sep. 2011**
9.x Talent Management and eCompensation Functional Lead
- Assessed and recommended leading-practice business processes, product set-up/configuration, integration, application security, workflow, testing, training, and operational support team roles & responsibilities.

University of Wyoming   **June 2011 – July 2011**
9.1 Talent Management Functional Lead
- Business Requirements Gathering, and Fit/Gap Analysis & Design
- Functional System Design, Specifications, and Configuration
- Developed System Test Plan and Scripts, Training Plan and Job Aids, and Business Process Documentation

K-12 City School District in the Northeast   **Dec. 2010 – June 2011**
9.1 Talent Management Functional Lead
- Functional expert in 9.1 Talent Acquisition Manager & Candidate Gateway
- Provided all functional and semi-technical knowledge related to 9.1 PeopleSoft TAM applications to the project team.
- Provided practical 9.1 Self-Service expertise based on prior direct experience in designing and deploying the product functionality in complex, large scale environments.
- Assisted, as needed, the business analyst, security administrator, and information architect to perform their duties as it related to the TAM/CG implementation.

Commercial and Personal Insurance Provider in 21 states   **Oct. 2010 – Dec. 2010**
9.1 ePerformance QA Functional Lead
- Analyzed and made recommendations regarding ePerformance configuration, customizations, and security to meet the client's business requirements in PeopleSoft 9.1.
- Used UPK to create test plans and test scripts as well as review training documentation.

Federal Department underneath Homeland Security   **April 2010 – Oct. 2010**
9.1 Talent Management Functional Lead
- Standalone rapid implementation of Talent Acquisition Manager (TAM) and Candidate Gateway (CG) for the first install of PeopleSoft TAM & CG version 9.1 for a U.S. Federal Governmental Agency. Used Oracle's Compass Methodology for SDLC.
- Performed Fit/Gap analysis on TAM and CG as well as Core Foundation tables required such as Job Code, Tax Location, and North American Payroll to add employees to the 9.1 standalone instance for User Security.
- Used a Smart-Hire Template to hire new employees into Job Data with a minimal amount of data entry.
- Added SetID, Companies, Business Units, and Departments to be used as defaults for the Smart-Hire template.
- Acted as the current Security Administrator to ensure the proper roles for hiring managers, recruiters, employees, and applicants are setup correctly for workflow.
- Configured Resume, Screening, Job Posting, Job Opening, and Recruitment templates to meet the agency's Office of Federal Contract Compliance Programs (OFCCP).
- Configured Profile Management to use Content Items in the online application (Resume template).
- Configured Posting Description Types and Library to house Job Posting data for an interface to USAJOBS.gov, the Federal Government's website to view and apply for jobs.

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- Created pre-screening knockout questions (Question Sets) to prevent applicants from completing the online application if they do not meet the basic requirements for the job opening (e.g., U.S. Citizen).
- Created screening levels and criteria to rank applicants based on their Priority Placement and/or Veteran's Preference.
- Developed functional specs for online and reporting customizations, including the Certificate of Eligibles.
- Developed System and User Acceptance test scripts and reporting testing defects.
- Prepared cutover tasks list to move the system to production.
- Provided post-production support.

Largest Catholic Health Ministry in the U.S.　　　　　　**Feb. 2010 – March 2010**
9.1 eCompensation Functional Lead
- Participated on the implementation of the largest PeopleSoft 9.1 Project at the time for the largest Catholic Health Ministry in the country.
- Performed Assessment on Compensation business processes.
- Captured Functional Requirements for Salary Market Analysis, Salary Plans, Annual Compensation Cycles, and Administering Pay with Business Process Flows and other documentation tools.
- Created test scenarios and test scripts for the initial Conference Room Pilot (CRP) to include Job Profiles, Salary Market Analysis, Job Pricing, and Administering Pay.
- Configured Job Codes, Salary Planning, and Profile Management – Profile Manager is a key element in the execution of any integrated talent management process - for the initial CRP based on decisions made by the organization.

Federal Housing Mortgage Company　　　　　　　　　**Nov. 2009 – Dec. 2009**
9.0 MSS and Talent Management Functional Lead
- Upgraded PeopleSoft HCM from 8.8 to 9.0 for one of the two largest mortgage companies in America.
- Performed Fit/Gap analysis on TAM/CG, ePerformance, and Position Management.

Rapid Transit Authority in the Pacific Northwest　　　**July 2009 – Sep. 2009**
9.0 Talent Management Functional Lead
- Upgraded PeopleSoft HCM from 8.8 to 9.0 for a mass transit authority in the Northwest.
- Performed Fit/Gap analysis on Workforce Administration, Position Management, and TAM modules.
- Configured the system to meet the client's business requirements.
- Created functional specs for modifications to the application where gaps existed according to the client's business process.
- Led testing effort by creating System and User Acceptance test scripts and reporting testing defects.
- Worked with the Security Administrator to ensure the proper roles were setup properly for workflow.
- Identified the deltas between version 8.8 and 9.0 to create UPK training materials.

Fortune 500 Grocery Store Chain　　　　　　　　　　**Jan. 2009 – May 2009**
9.0 Talent Management Functional Lead
- Configured Talent Acquisition Manager (TAM) and Candidate Gateway (CG) to implement Recruiting Solutions 9.0 for a major retail grocery chain in the Southeast to replace an existing internal recruiting solution.
- Designed and configured templates, questionnaires, and screening criteria to internally post job openings for retail and corporate operations. Modified the Text Catalog to provide page instructions online.

- Configured Status Area and Reasons to trigger different dispositions in the Interview and Offer stages.
- Led testing effort by creating & executing system test scripts and reporting testing defects.
- Created use cases to develop Train-the-Trainer training guides for recruiters, hiring managers, and applicants.
- Worked with the Security Administrator to ensure the roles are setup properly for Recruiter, Recruiting Administrator, Hiring Manager, and Applicant.

Gas Pipeline Company   **April 2007 – Oct. 2008**
8.9 ePerformance Functional Lead
- Configured Annual and Midyear Performance Reviews to tie to Salary Planning.
- Used Group Build to create Group IDs by Supervisor so managers can do employee performance reviews online.
- Configured Document Templates, Section Definitions, and Performance Criteria.
- Performed Fit-Gap analysis of requirements to package.
- Documented modifications to business processes, policies or system.
- Used UPK to create test plans and test scripts as well as review training documentation.

8.9 eCompensation Functional Lead   **Nov. 2007 – March 2008**
- Configured Base Compensation and Manage Budgeting (Salary Planning) to implement eCompensation and eCompensation Manager Desktop.
- Used Plan Salaries to calculate Base Compensation Budgets; View Budget Comparisons; Plan Group Increases; Load Salary Changes to Compensation Records (Job Data).
- Used Group Build to create Group IDs by Supervisor so managers can view and initiate changes for employees against an associated budget online.
- Configured the workflow approval process for Ad Hoc Salary Changes to use Supervisor ID on the Job record instead of Manager ID off of the Department table.
- Modified Roles and Permission Lists so that only managers had access to the data they needed to approve budgets.
- Directed the testing activity by developing test scenarios and scripts.

8.9 Talent Management Functional Lead   **April 2007 – Oct. 2007**
- Configured Talent Acquisition Manager (TAM) and Candidate Gateway (CG) to implement Recruiting Solutions.
- Gathered and defined Talent Acquisition Manager (TAM) and Candidate Gateway (CG) requirements for the client.
- Led prototyping sessions and demonstrated software functionality.
- Developed fit/gap documentation based upon requirements and functionality.
- Designed and configured templates, questionnaires, and Terms and Agreements for external applicants and employees.
- Led testing effort by creating test scripts and facilitating testing defect review meetings.
- Assisted in creating training documentation for recruiters and hiring managers.

Georgia Tech   **March 2007 – April 2007**
Manager Self-Service Functional Consultant
- Analyzed the university's business requirements to rollout Manager Self-Service (MSS) transactions such as Terminations, Retirements, Promotions, Demotions, Pay Rate Changes, Transfers, and other Data Changes on PeopleSoft; which included identifying workarounds, customizations and revisions to security.
- Worked with business analysts and developers to come up with a solution to roll out the MSS workflow approval processes. PeopleSoft-delivered, several of these transactions did not have an approval process and, hence, did not meet the university's needs.

Large Healthcare System in Kentucky   **Feb. 2007 – March 2007**
eRecruit Trainer
  ➢ Maintained a current, in-depth knowledge of the functions and features of the eRecruit and eRecruit Manager Desktop product to effectively transfer this knowledge to managers, supervisors, and recruiters in order for them to use the modules as effectively as possible.
  ➢ Delivered consistent, high quality, appropriate levels of training on the eRecruit product suite to a wide range of users.
  ➢ Courses delivered at corporate headquarters, client's sites, one on one, and remotely through Webex's.
  ➢ Worked with the system analysts, developers, and/or infrastructure team to test software for go-live. Provided feedback on application errors and worked with the project team for resolution.

B2B Commerce Company   **July 2006 – Jan. 2007**
8.9 Talent Management Functional Lead
  ➢ This client was upgrading from 8.3 to 8.9. They started implementing eRecruit in 8.3 and decided to scrap it.   Therefore, this was a new implementation of 8.9 Talent Acquisition Manager & Candidate Gateway from a third-party recruiting application, iCIMS.
  ➢ Analyzed and made recommendations for Talent Acquisition Manager (formerly Recruit Workforce and eRecruit Manager's Desktop) and Candidate Gateway (formerly eRecruit) configuration, customizations, and security to meet the client's global business requirements identified in PeopleSoft 8.9.
  ➢ Led Fit/Gap sessions to identify the client's requirements and system modifications to adapt the system such as the Job Opening and Job Offer to work globally across the U.S., Europe, and Asia.
  ➢ Configured Implementation Defaults, Sites, and Attachment Types based on the above.
  ➢ Set up Job Opening, Job Posting, Resume, Screening, Questionnaire and Recruitment Templates for the job requisition and job application processes.
  ➢ Reviewed resume processing vendor solutions from Resume Mirror and Resume Fox. The Resume Mirror solution included a plug-in for Microsoft® Outlook® and Microsoft Word® which allowed resumes received via email or opened in Word, to be processed through its resume parsing extractor so they could automatically be loaded into the Talent Acquisition candidate database.
  ➢ Created functional specifications for developers to make customizations where delivered functionality did not meet the client's requirements.
  ➢ Identified and created test scenarios and scripts for testing the system "soup to nuts" from the Job Opening through the Manage Hire business processes.

Medical Instrument Company   **Jan. 2006 – May 2006**
8.9 Self-Service Functional Consultant
  ➢ Analyzed the client's business requirements to reconfigure and test eBenefits and eProfile on PeopleSoft 8.9; which included identifying workarounds, customizations and revisions to security.
  ➢ Configured options in eBenefits to enable, by Event Class and Life Event Rules, how information entered through self-service is handled; for instance, New Hires and Family Status Changes. Also, added client-specific information to the Self-Service Text tables.
  ➢ Configured options in eProfile to enable, by transaction, how information entered through self-service is handled. For instance, Marital Status and Address Changes did not update the database directly because these changes affected benefit eligibility.

Texas A&M Medical Center   **Nov. 2005 – Dec. 2005**
8.9 Talent Management QA Functional Resource
  ➢ Analyzed and made recommendations for Talent Acquisition Manager and Candidate Gateway configuration, customizations, and security to meet the client's business requirements in PeopleSoft 8.9 identified in the Fit/Gap phase.

State University Consortium of Florida (FSU & FAMU)   **Aug. 2004 – Nov. 2005**
8.9 Self-Service Lead & Talent Management Functional Lead

- ➢ PeopleSoft 8.9 HCM Self-Service Lead involved in the implementation and deployment of Self-Service functionality to managers and employees for two major state universities.
- ➢ Client initially implemented eRecruit in 8.8. Upon completion, immediately upgraded to 8.9 taking advantage of new features in TAM & CG as well as other HCM modules.
- ➢ Performed a Fit/Gap on the deltas between 8.9 and 8.8.
- ➢ Analyzed Self-Service apps, such as: TAM & CG; eProfile; eComp; ePay; eBenefits; ePAF (Electronic Personnel Action Form), and Manager's Desktop to meet the client's business requirements.
- ➢ Configured options in ePay to enable how information is handled through self-service; for instance, Direct Deposit, View Paycheck, Voluntary Deductions, W-4 Tax Info, and W-2 Reissue Request.
- ➢ Analyzed Self-Service customizations and business process workarounds to fill the gaps (business requirements not met) identified above.
- ➢ Analyzed, configured, and tested Employee Self-Service and Manager's Desktop system requirements such as permission lists, roles, direct reports setup, job requisition authorizers, and workflow defaults.
- ➢ Coordinated testing efforts between eApps modules and Workforce Administration.

Brigham Young University (BYU)   **July 2003 – July 2004**
HRMS Functional Lead

- ➢ Guided functional users and technical developers in a higher education environment in the upgrade to PeopleSoft 8.8 from 7.5 with an active payroll population of over 18,000, which included students.
- ➢ The upgrade included: Human Resources; Salary Administration (Compensation); Position Management; Recruit Workforce; Base Benefits; and Payroll.
- ➢ Analyzed previous customizations (i.e., online mods, SQRs, and interfaces) and business process workarounds that could use PeopleSoft-delivered vanilla functionality by demonstrating the 7.5 to 8.8 deltas during the Fit/Gap Analysis phase.
- ➢ Analyzed Self-Service apps, such as: eRecruit; eProfile; eComp; ePay; and Manager's Desktop to meet some of the business requirements identified above.
- ➢ Developed a matrix for the Steering Committee to determine whether to implement eRecruit or a third-party eRecruit-like product.
- ➢ Conducted analysis with business representatives to understand their business requirements and translated them into security system requirements.
- ➢ Configured permission lists, roles, row-level security, and primary permission list preferences into user ids to coincide with department tree-level security and access.
- ➢ Assisted in creating test plans with Project Manager and functional subject matter experts. Coordinated testing efforts to test business processes from "Hire to Termination." Logged errors through intranet testing tracking system.
- ➢ Demonstrated to end-users on the pros and cons of using Position Management. Because of the dynamics of the organization, the client decided to forego this module and used existing job codes instead.

State University Consortium of Florida (FSU & FAMU)   **March 2003 – July 2003**
HRMS Functional Lead

- ➢ Designed and configured a prototype in PeopleSoft 8.8 for a Higher Education (E&G) environment with over 12,000 paid employees and students. The HRMS implementation included: Administer Workforce, Recruit Workforce, Position Management, Benefits Administration, Payroll, Commitment Accounting, Department Budgeting and Encumbrances, and Time & Labor. In addition, the implementation of the HRMS Collaborative (Self-Service) apps included: eRecruit, eProfile, eComp, eBenefits, ePay, Manager's Desktop, Workflow, and

PeopleSoft's Resume Processing End-to-End Solution. The overall implementation also includes PeopleSoft 8SP1 Student Administration and 8.4 Financials.

➢ Worked at all levels within the entity's structure to identify key business requirements in the Discovery (Fit/Gap) phase.
➢ Configured PeopleSoft, specifically the Self-Service apps, to meet the business requirements identified above.
➢ Identified the Enterprise Integration Points (Application Messaging) and setup to be used between the Student Administration and Financial modules such as: Payroll to GL; Time & Labor to Projects; Vendors to AP; etc.
➢ Provided guidance and assistance to team members and client staff in the use of the PeopleSoft modules.
➢ Used project management techniques and tools to establish and maintain work schedules to ensure the project milestones are planned and completed in a timely, cost effective manner.
➢ Anticipated changes required in project plans and processes and recommends alternative approaches to the Project Director by reporting possible scope changes immediately.

Largest Window Manufacturing Company in Western U.S.   **Oct. 2002 – Feb. 2003**
eRecruit Functional Lead

➢ Configured PeopleSoft 8.3 Recruit Workforce, eRecruit, and Manager's Desktop for the largest window manufacturing company in the Western United States, with nearly 2,500 employees in 14 Western states.
➢ The eRecruit implementation included: Administering Job Requisitions; Applicant and Requisition Activity; Recruiter's Desktop; Manager's Desktop; Workflow; and Resume Processing (Mohomine).
➢ Analyzed HR business processes and possess IT skills to manage the implementation of the Recruiting and Self-Service processes.
➢ Analyzed the client's requirements and guide developers into accomplishing business objectives.
➢ Assisted PeopleSoft developers, DBAs, and security administrators in troubleshooting issues such as: Mohomine; Verity (Applicant Index); Workflow Rules, Routing, and Roles; and Self-Service Roles and Permission Lists for the eRecruit and Manager's Desktop modules.

University of Pittsburgh Medical Center   **June 2002 – Oct. 2002**
Self-Service Functional Lead

➢ Upgraded PeopleSoft from 7.5 to 8.3 in a healthcare setting and implemented the 'e' modules: eRecruit and eBenefits. The upgrade included: Human Resources; Recruit Workforce; Position Management; Payroll; Training Administration; and Benefits Administration. The implementation of the 'e' modules included converting a third-party recruiting application, Greentree into these eRecruit business processes: Job Requisition and Applicant Activity; Resume Processing (Mohomine); Manager's Desktop; Workflow; and processing New Hires and Family Status Changes through Self-Service (eBenefits).
➢ Identified client's key business requirements.
➢ Configured PeopleSoft to meet those business requirements.
➢ Trained the client staff in the use of the PeopleSoft modules.
➢ Supported the client team post-implementation.
➢ Daily onsite project management in the functional area of the project.

University Hospital in Philadelphia   **Dec. 2001 – May 2002**
HRMS Project Lead

➢ Led a higher education (public sector-like) environment in the upgrade from 7.0 to PeopleSoft 8.3 HRMS with an approximate payroll conversion of nearly 19,000 employees. The re-implementation (upgrade) included the following modules: Human Resources (Fit/Gap on eProfile, including Personnel Actions); Recruit Workforce (Applicant and Requisition Tracking); Payroll (Fit/Gap on ePay); and Benefits Administration (Fit/Gap on eBenefits). In addition, also

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implementing eHR collaborative apps such as: eRecruit, including Job Requisition and Applicant Hiring; Resume Processing (Mohomine); Manager's Desktop; Enterprise Portal (including Single Sign-On capability); and Workflow.

➢ Identified previous customizations that could use PeopleSoft delivered vanilla functionality by demonstrating the deltas during the Fit/Gap Analysis phase.

➢ Provided interactive support between the functional subject matter experts and the technical developers during the Design phase; including making panel/page (records) and value (fields) modifications.

➢ Provided strategy and execution for unit, system, and parallel testing using PS Query skills to build complex queries and database links to validate and troubleshoot test plans during the Testing phase.

➢ Provided oversight and quality assurance in designing and setting up core system tables for HR and Payroll, plus Security which included: Tree Manager; Permission Lists; Roles; User Profiles; and Business Activities to support delivered Workflow components.

Major Restaurant Delivery Chain   **Aug. 2001 – Nov. 2001**
HRMS Project Lead

➢ Led an HRMS upgrade from PeopleSoft 7.0 to 8.0 for a business that operates domestically in 49 states, the District of Columbia and 10 international markets with a payroll population of close to 20,000. The upgrade included the following modules: Human Resources; Payroll (including multiple state localities); Base Benefits and Training Administration.

➢ The objectives of the implementation were to:

➢ Implement the system in the current location in this phase.

➢ Implement the same basic functionality that exists to support the current business processes.

➢ Keep employees involved in the process during the whole implementation.

➢ Transfer knowledge to client so they can confidently operate the system in production.

➢ Provide an application platform to support the client's business, whereby, client can add additional functionality in subsequent phases.

One of the largest North American Food Producers   **April 2001 – July 2001**
HRMS Functional Consultant

➢ PeopleSoft 8.0 HRMS implementation for one of North America's largest food producers with a payroll population of 68,000. The implementation included Human Resources (HR), Ben Administration (Ben Admin), and Payroll modules.

➢ Researched, developed and recommended alternative solutions to gaps.

➢ Identified pros and cons of alternative solutions and recommended the "best" solution.

➢ Developed detailed functional specifications according to project standards for those "best" solutions that required modifications to the system.

➢ Identified test cases and developed test scripts.

➢ Tested modifications to ensure that each performed according to specifications and test plans.

➢ Transferred knowledge to client staff.

HRMS and CRM Training   **March 2001 – April 2001**
PeopleSoft 8.0 HRMS
Siebel 2000 Core Consultant Course

State of Delaware (including Delaware University System)   **July 2000 – Feb. 2001**
HRMS Functional Consultant

➢ Conducted thorough testing of PeopleSoft Public Sector HRMS 7.5 prior to the upgrade of Human Resources (HR) and the implementation of Benefits Administration and Payroll for a state government agency.

- ➢ Member of a 4-person team responsible for creating and executing over 600 unit and system test scripts for approximately 160+ customizations on an employee population of 38,000 for a state government project.
- ➢ Used "Mock Conversion" data, a trial population of the employee base, to conduct test scenarios, allowing the test environment to reflect the production environment as closely as possible and identify errors that might have otherwise gone undetected.
- ➢ Defined the steps, input data, and expected results for test conditions.
- ➢ Recorded and retested errors.

Financial Services Company   **July 1999 – June 2000**
HRMS Functional Consultant
- ➢ Setup and conducted PeopleSoft HR/Payroll and Benefit functional workshops for a PeopleSoft HRMS 7.5 Upgrade Project.
- ➢ Provided working knowledge of process changes in PeopleSoft HRMS Release 7.5 from 6.02.
- ➢ Provided working knowledge of Workflow processes and assisted in the recommendation to use a Workflow alternative for the automatic distribution of certain reports.
- ➢ Provided working knowledge of Position Management and assisted in determining the recommendation presented to the Executive Steering Committee.
- ➢ Assisted with requirements gathering and documentation and redesigning Business Processes.
- ➢ Developed Test Plan, including detailed schedules for Unit, System/Integration, and Parallel/Acceptance testing phases.
- ➢ Designed an Access database to track test cases and errors.
- ➢ Coordinated the development of Test Cases/Scenarios, and Test Scripts using SQA Robot, an automated testing tool.
- ➢ Coordinated the testing of HR, Benefit, and Payroll pay-inbound, including Time Entry, IVR, and Intranet applications and non-pay inbound interfaces and customizations with internal and external vendors.

PSInet (formerly Metamor Solutions)   **Oct. 1998 – June 1999**
HRMS Functional Consultant
- ➢ Developed a Process Blueprint, organizing the company across five business units identifying the PeopleSoft HRMS 7.5 modules corresponding to the organization.
- ➢ Produced a high-level demonstration of the way HRMS information rolled up to the corporate level using PeopleSoft with minimal customizations.
- ➢ Configured the HRMS setup parameters including panel and record changes for the first business unit to go into production. Assisted with data mapping to convert from ADP PC Payroll to PeopleSoft HRMS 7.5. Also verified training materials to be used for end-users.

PricewaterhouseCoopers   **May 1998 – Oct. 1998**
HRMS Functional Consultant
- ➢ PwC Internal Implementation
- ➢ Identified the benefit and payroll fields critical for deduction and tax processing in PeopleSoft HRMS 7.5. The client previously had determined that PeopleSoft Benefits and Payroll were out of scope in PeopleSoft HRMS 7.0.
- ➢ Configured the application's setup parameters for payroll prototyping.
- ➢ Assisted with data conversion field definitions and data mapping to the legacy system.

Dept. of Treasury, Puerto Rico   **Feb. 1997 – May 1998**
HRMS Functional Consultant
- ➢ Provided planning and implementation consulting assistance on PeopleSoft Human Resources and Infinium HR/Payroll projects.

- Participated on a five-person functional team to implement PeopleSoft's Public Sector HRMS 6.01 for a governmental agency from the Project Initiation stage through Package Solution Definition. Used a proven methodology to manage the life cycle of the project.
- Team lead for System Testing. Established Test Plans, Testing Strategies as well as Test Scenarios, using SQA Robot, an automated testing tool.
- Team lead for BASys, a database tool to track business events including change requests to document requirements for Fit/Gap analysis. In addition, this tool was used to develop migration procedures and end-user documentation. This tool created 80% of the detailed design document for client approval.
- Familiar with IDEF-META, an integrated computer-aided manufacturing definition methodology tool for business modeling to design and document the "as is" and "to be" reengineered processes.
- Conducted JAD sessions to reengineer business processes including forms, reports, etc.
- Guided the client to a "best practice" solution in setting up tables for development and application prototyping.

Major Publishing Company in NYC   **Sep. 1996 – Feb. 1997**
HRMS Functional Consultant
- Provided planning and implementation consulting assistance on Oracle Human Resources including Time & Attendance and PeopleSoft Human Resources system projects.
- Participated on a five-person functional team in the critical "going live" phase of PeopleSoft HRMS 5.12 running on an Oracle platform for a major publishing company.
- Assisted in setting up various foundation tables and new hire information to confirm data conversion verification from a legacy system, InSci.
- Also assisted in parallel testing, preparing technical, end-user and training documentation.

Education:
- MBA   University of Central Florida, Orlando, FL
- BA   Communication; minor in Business Administration, Florida State University, Tallahassee, FL

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Bharat Nagireddy
Senior PeopleSoft Consultant

Summary:

Bharat Nagireddy has fourteen (14) years of consulting experience in Client Server Technologies and ERP PeopleSoft applications as Product Architect, Manager and Techno-Functional resource. He has participated in PeopleSoft upgrades and full-cycle implementation projects. Bharat is proficient at Business requirements gathering, process analysis and design, gap analysis, functional system design and specification, system configuration, development of system tests, procedures and documentation are some of the key roles he has led in the course of my experience.

- Subject Matter Expert PeopleSoft CRM Modules Order Capture, Order Capture Self Service, Support (Call Center), Support Self Service, Field Service Applications, Product and Item Management, Correspondence Management, Sales, Marketing, Account Management, Partner Management, Number Management, Enterprise Pricing, Catalog Management. PeopleSoft HCM Modules HR, Payroll for NA, TAM/CG, Profile Management
- Thorough understanding of all the phases of Project Development Lifecycle
- Technical expertise in using PeopleTools Application Engine, Component Interface, Integration Broker, Workflow and PeopleCode
- Excellent understanding of integration touch points between CRM and SCM & CRM and HCM
- Proven ability to design and implement Module enhancements in PeopleSoft CRM Products. Excellent history of successful customer project delivery and Project team management.
- Ideal Liaise between the functional and technical teams to develop technical solutions to meet functional requirements.
- Proven ability to help the users define requirements, manage expectations, ask key questions, and raise issues that may impact the firm and other ongoing work streams. Apply project lead or management experience and knowledge of Business Process Reengineering, testing, fit-gap analysis and application development and thorough knowledge of the full software development life cycle for PeopleSoft.
- Diverse industry experience includes Telecom and VOIP, Banking (Retail, Investment and Mortgage), Government Housing, Retail.
- Experienced in System Upgrades, ERP Implementations with EAI Solutions under different mainframe and client server systems
- Acknowledged for excellent trouble shooting skills by managers and team on every site
- Thorough understanding of conversion strategies in all mentioned modules
- Working knowledge of PeopleSoft Portal Technology
- Adept in analyzing functional requirements and identifying data sources, data structures, data cleaning needs, analytics and reporting requirements and preparing a roadmap for Data Conversion to PeopleSoft

Skills:

- **PeopleSoft:** PeopleSoft CRM 8.9/8.8 (Order Capture, Order Capture Self Service, Service Management, Support, Sales, Marketing, Partner Management, Number Management, Pricing, Catalog Management), PeopleSoft Enterprise Portal 9.0 /8.8, PeopleSoft HRMS 9.1/9.0/8.3/8.0 (HR, Payroll for NA, Base Benefits, TAM/CG, Profile Management, eRecruit, eBenefits, eProfile)

- **PeopleTools:** Application Designer, Application Engine, Application Messaging / Integration Broker, Component Interface, Process Scheduler, Upgrade Assistant, Tree Manger, Process Monitor, Import Manager, Operator Security,

PeopleCode, Workflow, Data Mover, SQR, Crystal Reports, n/Vision, Query
- **Reporting Tools:** SQR, Crystal Reports
- **RDBMS:** Oracle 8i/7.x, SQL-SERVER 2000/7.0/6.x, and DB2
- **Languages:** SQL, PL/SQL, COBOL, Java, VB Script, JavaScript

- **GUI:** Visual Basic 5.0/6.0, Developer 2000
- **Web Tools:** WebLogic 6.x/5.x, Tuxedo, HTML, XML, XSL
- **Operating Systems:** Windows NT/2000/98/95, UNIX (Sun Solaris), AS-400

Professional Experience:

Cigna Health   **Feb. 2012 - present**
Sr. PeopleSoft Technical Consultant
Production Support
- Responsible for post-production support after acquisition
- Fixed Integration Broker issues during hire request and post hire request
- Customized Prep for hire and added custom fields / code to pass data to employee job data
- Created a custom AppEngine program to load data the PSHUP table using CI
- Developed custom work center for payroll reconciliation
- Created custom Navigation Collection for the payroll reconciliation work center
- Developed custom query based and XSL based pagelets
- Lead for acquisitions and mergers
- Successfully completed two acquisitions with employee strengths of 5000 and 400 respectively, ahead of schedule and below budget
- Lead for data architecture / mapping and technical design and build of various interface / data conversion load programs
- Designed all conversion/load programs and Interfaces
- Designed and developed an App Engine to load employees using Person and Job Data CIs respectively
- Created an App Engine to mass update employee data using Job Data CI
- Loaded pay group and company data using Excel to CI
- Wrote SQR to covert and upload new employee direct deposit data
- Designed and developed conversion AppEngine to create new departments
- Created conversion / clean programs to import legacy UltiPro Data into custom PeopleSoft table
- Designed and developed custom reports / ready-only pages for users to access legacy data
- Developed a new conversion AppEngine to load employee Fed / State /Local tax data
- Worked on upgrade from 8.9 to 9.1
- Lead for applying bundles and patches post upgrade
- Lead / designed/ developed the integration with new job board vendor "Broadbean"
- Customized the plug in for integration "Resume Mirror"
- Integrated with Cigna Portal
- Modified the delivered HTML and Ajax component to provide uniform look and feel with Cigna Portal
- Worked on defect resolution

Environment: PeopleSoft HRMS 9.1 – HR, Payroll, Base Benefits, Time and Labor, TAM /CG, Portal

Philadelphia Housing Authority (PHA)   **Jan. 2008- Feb. 2012**
Sr. PeopleSoft Technical Consultant
Environment: PeopleSoft PORTAL 9.0/8.8
- Activated and set up single sign on between PORTAL / CRM / FSCM and HR systems
- Registered links on the left navigation for users for accessing components in HR, SCM and CRM directly from portal.
- Synced users between Portal and other PeopleSoft implementations like HR, SCM and CRM.
- Fixed issues with roles and user security to allow users to access different applications seamlessly.

ORACLE CERTIFIED PARTNER

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- ➢ Created header and footers with the company logo displaying on the homepage.
- ➢ Configured pagelets for displaying regular updates from the CEO.
- ➢ Developed new style sheets as per required look and feel.
- ➢ Designed developed custom integration between Field Service and T&L for capturing employee work hours and overtime
- ➢ Responsible for activating the EIPs between HCM and CRM & FSCM and CRM
- ➢ Synced worker data between HCM and CRM
- ➢ Worked extensively on AAF and created policies for CRM Support
- ➢ Integrated Field Service with FSCM ePro for material stock request
- ➢ Created custom Bo Rel Type called Family composition of Type Organization
- ➢ Integrated with NTN(Nation Tenet Network) for criminal and credit checks
- ➢ Custom integration between CRM and AR for processing monthly rents & updating client demographics
- ➢ Developed batch process for 50058 HUD compliance
- ➢ Integrated with Elite to maintain voucher issued to client to CRM
- ➢ Created internal and external audiences
- ➢ Generated fixed audiences for employee training
- ➢ Defined dynamic audience for HUD Housing Choice Voucher(HCV) Program using PSQuery
- ➢ create Dialog the HCV program using the graphical interface
- ➢ Linked email documents and Audience to the Dialog
- ➢ set up people profile and linked it to email document
- ➢ Data conversion to bring client , unit and rent detail information from legacy system(CSS)
- ➢ Create custom component to schedule technicians for service orders using custom schedulers
- ➢ Created online views improve system visibility and help management perform decisions
- ➢ Worked on PeopleTools upgrade from 8.47 to 8.49 and 8.49 to 8.50
- ➢ Provided 24X7 production support
- ➢ Coordinated and deigned with Oracle-GSD(India) to develop custom calendar for scheduling
- ➢ Responsible for customization, development, migration and maintenance of PeopleSoft on-line applications for Human resources, T&L applications using People Tools, People Code and SQR.
- ➢ Worked on various interfaces and integrations between HRMS and CRM modules and HRMS and the legacy system.
- ➢ Responsible for fit- gap for the 9.0 application upgrade (T & L module).
- ➢ Worked on various EIPs like Departmental Full Sync and Incremental Sync, Workforce sync between HRMS and Financials /CRM modules.
- ➢ Designed and developed custom component for new hire and its associated approval process.
- ➢ Used CI to insert new row in JOB table to bring over the Reports To from Position data when Position data is updated or a new row is inserted.
- ➢ Customization on Employee Status Change and New hire forms to update Job and Position data with Reports To.
- ➢ Developed custom components for employee performance review and rating.
- ➢ Developed pages for viewing all budgeted and vacant positions for each Dept. GM and linked it to the new hire approval process.
- ➢ Customized the employee termination process to automatically clear the vacation and sick leave accrued in case of a disciplinary action.
- ➢ Changed the termination approval process to include Labor Relations Manager for represented employees.
- ➢ Changed the employee Hire approval process, developed a new workflow to meet PHA's approval process.
- ➢ Added new employee separation action for layoffs and customized the payroll, benefit process to terminate the employee in case of layoffs.

Environment: PeopleSoft HRMS 8.3 /9.0 – HR, Base Benefits, Payroll, T&L, Recruit, PeopleSoft CRM 8.9 - CRM Field Service, Support, Product, Online Marketing

Hawaiian Telecom Project   **Jan. 2006- Nov. 2007**
Sr. PeopleSoft Technical Consultant
  ➢ Worked on CRM Support module for ECARE and CRM Order Capture
  ➢ Trained and supported Global development center in Manila and India
  ➢ Responsible for development resources allocation and utilizations
  ➢ Configured and Set up Business projects for Post order processing
  ➢ Wrote a batch process for republishing the error XML Messages from Integration Broker table
  ➢ Designed and developed the process flow for Cancel orders
  ➢ Developed a custom PONR interface for order validation
  ➢ Involved on the tuning of the application to improve response times for critical business processes across the applications customer 360 degree, Order Capture , CRM Support
  ➢ Involved in tuning of Business Projects and CRM Interfaces like Address Validation, TN reservation
  ➢ Involved in the design and implementation of miscellaneous interfaces between CRM and conveyed systems for Telecommunications via AWAS, AAIS-NB etc.
  ➢ Involved in planning for application upgrade
  ➢ Applied the relevant patches to Demo environment and manually applied the patches to DEV
  ➢ Acted as a point-of-contact with PeopleSoft GSC for opening and tracking online support cases for unresolved defects in the production environment
  ➢ Interfaced with the client end users and supported them during go-live
  ➢ Involved in resolving the issues with the client for orders in CRM work lists
  ➢ Trained the work list users on how to identify and resolve failed orders
  ➢ Wrote a batch process to automatically close cases from provider group work lists
  ➢ Supporting other CRM support interfaces like Line test, Remedy
  ➢ Worked on patterning of support cases for trouble identification
  ➢ Customized the sync to include data from custom HR fields and tables
  ➢ Developed an interface for managers to renew/terminate contractors
  ➢ Modified SQL behind JOB, NAME and other HRMS tables to improve performance
  ➢ Supported and resolved day to day issues after go live
Environment: PeopleSoft CRM 8.9 -Order Capture, Partners, Support, Support Self Service Correspondence Management

Philadelphia Housing Authority (PHA)   **Oct. 2005- Jan. 2006**
Sr. PeopleSoft Technical Consultant
  ➢ Responsible for activating the EIPs between CRM and Financials / HR
  ➢ Synced the inventory information between CRM and Financials
  ➢ Configured nodes and set up transactions
  ➢ Set up terms and policies for sending automatic notification to a supervisor if the a case has not worked on for a 36 hours
  ➢ Customized the service order so as to set the service order status close if all the associated activity statuses are set to completed or closed or canceled
  ➢ Customization to automatically close a case if all associated service orders are closed
  ➢ Custom Interface to integrate CRM field Service and AR
  ➢ Automatically create a Service Order when a case with emergency priority is created
  ➢ Modified the time and material lines to store the information received from AR
  ➢ Generate custom common delimited time data files for HR
  ➢ Worked on Workforce sync between HR and CRM
  ➢ Resolved issue related to workforce sync
  ➢ Interface to load the T&L data from CRM
  ➢ Migrate projects between environments and administer security to regulate access
  ➢ Support and resolve user issues
Environment: PeopleSoft CRM 8.9 for Field Service - CRM Field Service, Support, Correspondence Management, PeopleSoft HRMS 8.3 – HR, Time and Labor, Payroll

8X8 Inc., CA   **June 2005-Sep. 2005**
PeopleSoft CRM Techno-Functional Consultant
- ➢ Involved in working with business users for customization of the Order Capture module
- ➢ Configured and maintained the Order Capture Self Service login
- ➢ Created header and footer with the company logo
- ➢ Responsible interface designs for L&P portability and Credit Card Authorization
- ➢ Functional designer for FCC regulation on E911 compatibility
- ➢ Configured Custom Policies for instantiation of Business projects
- ➢ Configured and set various partners
- ➢ Defined discounts and giveaways
- ➢ Set up different pricing rules for partners
- ➢ Configured and set up Products, Product catalogs and catalog templates
- ➢ Set up custom Business Projects
- ➢ Defined roles and permission lists for guest user, consumers and customer representative
- ➢ Set up the web profile for a guest user
- ➢ Set up CRM application security
- ➢ Configured membership list, view lists and security profile

Environment: PeopleSoft CRM 8.9 for Order Capture – CRM Order Capture Self Service, Pricing, Partner Management, Number Management, Support, Catalog Management, Marketing, PeopleSoft Enterprise Portal

Lab Safety Supply, WI   **Dec. 2004-May 2005**
PeopleSoft CRM Techno-Functional Consultant
- ➢ Responsible for Integration with third party system WEBSHIP for freight terms and freight calculation using Stored procedures through PeopleCode
- ➢ Configured and setup the various phases, tasks and business projects
- ➢ Set up the component event model and defined rules
- ➢ Set up tokens, templates, template groups and packages
- ➢ Defined price rules, giveaways and formulas for various products
- ➢ Defined campaigns & waves based on the price and catalog codes
- ➢ Configured the price rule set up to trigger for different conditions based on the client requirements
- ➢ Developed Application Engine program to generate price rules based on the current campaign
- ➢ Modified the order search page to include custom fields and tuned the resulting SQLs for better performance
- ➢ Developed batch process to send shipping confirmations to the customers based on their preference
- ➢ Modified the delivered template and tokens as per clients requirements
- ➢ Modified the RBC_GENDATA to interface with a custom fax interface
- ➢ Modified the RO_SND_EMAIL task to send order confirmation to the customers
- ➢ Customized the order entry page including the shipping, billing, header and line sub pages
- ➢ Worked on hiding/un-hiding of fields, grids and links on various subpages like shipping and billing sub-pages
- ➢ Set up transfers to different pages within CRM and also between CRM and Financial modules
- ➢ Worked on customization of the order Summary page – added custom subpage, custom fields, work records and message catalog entries
- ➢ Modified Application Packages like, RO_CAPTURE, RO_CAPTURE_TYPES for displaying various additional customer information on the order entry page including customer and contact ids, detailed credit card information and customer attributes
- ➢ Created custom secondary page for displaying customer and contact notes for sold to, ship to and bill to roles

Environment: PeopleSoft CRM 8.8 for Order Management – CRM Order Capture, Correspondence Management, Marketing

Citi Group North America (CBNA), NY   **Jan. 2004-Nov. 2004**
PeopleSoft Consultant
- ➢ Maintained the Portal for the whole Concierge implementation
- ➢ Created and maintained custom templates that were used for the pages instead of the default templates
- ➢ Added links to the custom left navigation as needed by the users
- ➢ Created pagelets to display sales and referral counts and controlled it with user security
- ➢ Responsible for integration between CIS and PeopleSoft System
- ➢ Developed customized sale Opportunity(Lead/Referral)Generation Process as per the clients requirements
- ➢ Developed customized Pipeline for viewing Leads/Referrals
- ➢ Worked on Integrating a Third party system, Lead Track, for generating Mortgage Referrals
- ➢ Designed and developed an App Engine Program to load users (workers and sales users) into the Worker component using the CI
- ➢ Configured and set up the territory tree
- ➢ Developed Custom App Engine Programs to load users into the Teams Table for the territory tree
- ➢ Developed Custom code for selection of sales user for the Round Robin Process
- ➢ Designed and Created custom pages as per requirements
- ➢ Worked on scheduling SQRs through PeopleCode for printing custom reports
- ➢ Built and created custom templates for local navigation
- ➢ Developed a batch process for creating the Referral Teams in a given Financial center
- ➢ Worked on custom connector for Lead Track system
- ➢ Supported QC and fixed defects as and when reported
- ➢ Created test scripts, unit test cases and was involved in assembly test process
- ➢ Developed a Batch Process to Load users into the referral teams
- ➢ Developed an App Engine program to update the Sales Users
- ➢ Created custom workflow for reminding sales users to close follow-up on the their leads
- ➢ Wrote PeopleCode for Real Time, adding, deleting and suspending Sales users from the territory tree
- ➢ Developed a system to automatically calculate the transaction for ordering statement and ordering transaction copies.
- ➢ Developed a function point to add and modify the Power of Attorney for existing accounts

Environment: PeopleSoft CRM 8.8 for Sales Implementation - CRM Sales and Marketing

SBC Internet Services, CA   **Jan. 2003- Dec. 2003**
PeopleSoft CRM Techno-Functional Consultant
- ➢ Responsible for requirement gathering for Order Capture, Billing and Business Projects by interacting with Business Users
- ➢ Preparing High Level and Detailed Level Design documents (Both functional and technical)
- ➢ Designed and build Business Projects and the various phases, tasks and events associated with the completion of a Business Projects
- ➢ Set up the Component Event Model and defined the rules for triggering the business projects
- ➢ Set up the and configured the Work Order Management Work list
- ➢ Set up workflow rules to trigger related task when a business project is submitted
- ➢ Defined workflow email templates that were used for business project notifications which had manual tasks associated with them
- ➢ Created correspondence requests, defined the recipients, the content, and the delivery information for the correspondence
- ➢ Set up workflow actions based on correspondence type to send manual notifications, correspondence requests, and automated notifications

- ➢ Set up action requests for manual notifications that are sent to Wordlists
- ➢ Configured the Product Model. Set up the different product packages, defined services, features and their attributes
- ➢ Worked extensively with the BORM
- ➢ Defined Business Objects and Name Types for business objects
- ➢ Customized the PeopleSoft CRM toolbar configuration application class to set up the Order Capture toolbar
- ➢ Worked with Application packages and was involved in developing new hold rules for validation of service attributes
- ➢ Customized the Service Management functionality to meet SBC's requirements
- ➢ Prepared the ground work for interaction between the CRM system and Member Registration system
- ➢ Designed and developed the Member registration system on the CRM side
- ➢ Designed and developed real time transactions using PeopleSoft Integration Broker for the implementation of the Network allocation system
- ➢ Set up the Header Statuses that identify the statuses that the CSR sees on the header
- ➢ Developed the customer fulfillment process
- ➢ Wrote run time application process for creating the installed services, activation and deactivation of account on the CRM system
- ➢ Worked on the CRM Account framework and its Integration with external billing system
- ➢ Developed synchronous transactions for activation and deactivation of services on the billing tier
- ➢ Designed transactions for real time activation and deactivation of services on the Member Provisioning system
- ➢ Designed and developed a batch process, called CRON-DISCONNECT, which was scheduled twice a day to deactivate the services in CRM system, Billing system and the Member provision system
- ➢ Worked on the handle validation tool process used to check active orders for a give user id and domain
- ➢ Configured the Integration Broker setting online and set up the transaction configurations for async and insync inbound and outbound message
- ➢ Configured and set up the Message Channels and Messages for the Registration and MPS system on the Integration Broker and the Application Designer
- ➢ Developed a batch process to release IPs back to the network allocation system
- ➢ Supported QC and fixed defects as and when reported
- ➢ Created test scripts, unit test cases and was involved in assembly test process

Environment: PeopleSoft CRM 8.8 for Communications Implementation - CRM Order Capture, Service Management, Support, Web Apps

Interpublic Group of Companies, NY   **June 2002- Dec. 2002**
PeopleSoft Analyst
- ➢ Prepared the groundwork for upgrading to PeopleSoft 8.3, including evaluation of customizations, project plan and Fit-Gap Analysis
- ➢ Worked with functional analyst to eliminate some customizations and retain the others
- ➢ Upgraded the existing HRMS System, which involved clean-up of database using SYSAUDIT and DDDAUDIT, generation and review of compare reports and System Audits
- ➢ Prepared technical design specifications for the changes needed for the new release
- ➢ Designed SQL and SQR programs to assist developers and functional users in preparations for PeopleSoft 7.5 and data reconciliation
- ➢ Designed and developed Component Interfaces and Application Engine programs to migrate older integrations developed using Database/Message Agent
- ➢ Implemented the eBenefits module by creating/modifying the pages according to the business requirement

- Worked on eBenefits for Open Enrollment 2002. This involved testing eBenefits and developed pages for plan / program specific data
- Set up eRecruit and eRecruit Manager Desktop and customized it for internal hire
- Implemented multi-level approval, Flexible routing rules for HR approvers and recruiters in eRecruit.
- Implemented the eRecruit manager desktop for recruiters, which allow them to create multiple job requisitions, review related applicants, post to online job boards and add a new recruiter.
- Developed an Application Message, which directly updates the eRecruit tables in PeopleSoft from Lotus Notes Intranet Site
- Modified the eRecruit self-service application for employees and applicants to include screening questionnaire
- Performed troubleshooting the problem areas in the Payroll process, setting up employees working with pay sheets, performing pay calculations, pay confirmations and producing payroll reports
- Worked extensively in Security by designing and developing roles, permission lists and user profiles for development environment. Also, developed an App Engine program to generate random passwords and reset the users' password and mail to them at the end of cutover schedule
- Assisted the functional team in resolving system test issues and documented the resolutions, Reports, PVCS, UNIX and Windows
- Developed Inbound interfaces for an incoming XML files from benefits providers like AMX and AON using component interfaces
- Developed Outbound interfaces to benefits providers like AMX and AON using Application Engine
- Developed interfaces to Towers Perrin, that hosts the website for open enrollment, to load the data into PeopleSoft
- Developed benefit interfaces to the following external systems:
- JP Morgan for 401K Plan
- United Healthcare for Medical
- Covantage for COBRA and HMO
- MetLife for Dental
- Aetna for Dental
- VSP for Vision
- Mellon Investor Services for Stock and ESPP Investments
- Production Support of HR and Benefits systems including daily event maintenance

Environment: PeopleSoft HRMS Upgrade from 7.5 to 8.3 - HR, Payroll, Benefits, Time and Labor, eRecruit, eBenefits, PeopleTools 7.5/8.16, SQR, Oracle, DB2, COBOL, Crystal

Credit Suisse First Boston, NY   **Sep. 2001 -May 2002**
PeopleSoft Support Analyst
- Assisted PS Administrator in configuring the upgrade assistant, creating template, and executing the upgrade steps
- Participated in the Fit-Gap Analysis for Upgrade process
- Retrofitted HRMS panels with customization. This included HRMS, Payroll and Benefits Panels
- Analyzed queries that are run very often and resource intensive and created indexing strategies to better optimize the database performance. Dropped unused indexes that slow data modifications and wastes database space
- Modified the delivered SQR Program BEN040 to generate billing statements for all employees that incurred charges for the current billing period
- Involved in implementation of Self Service Modules like ePay and eProfile
- Activated and customized the W-2 reissue workflow in ePay
- Created roles for eProfile Desktop Manager to authorize full/part time, locations changes request for termination and other changes
- Modified the given workflows in eProfile for name change and marital status change

- Ensured that all delivered objects were upgraded, required customizations were reapplied, and reports and interfaces were reviewed and updated
- Developed state Street Bank interface for employees who are enrolled in 401k savings plan. This output interface generates a text file, which contains amounts that have been deducted from their salary towards their deductions as and when the payroll runs
- Developed Buck Bonus Interface: This interface creates the file going to buck for the Technology Quarter Bonuses. After Bonus payment, this interface is run and the file is sent to buck
- Modified PeopleSoft delivered SQR DDP001 to accommodate requirements of Wells Fargo and to create a direct transmittal file containing direct deposit data for the current pay period; the data file was then transmitted to the Wells Fargo
- Involved in the analysis, design and developing the interface programs which tracks the employee and dependent detail changes and generates flat files to notify the benefit providers about the changes through FTP or email
- Created an interface to extract employee 401k demographic and contribution data from PeopleSoft and formatted an output file for American Express
- Developed an interface to upload bonus or one time payments using an excel spreadsheet into PeopleSoft.
- Assisted the system test with trouble shooting issues and providing resolutions

Environment: PeopleSoft HRMS Upgrade from 7.5 to 8.0 - HR, Payroll, Benefits, ePay, eProfile

Asea Brown Boveri Inc., NJ   **Jan. 2001-Aug. 2001**
Technical Consultant

- Performed Business Process Design, PS Query, SQR, and Crystal Reports as well as advanced debugging techniques - Application Reviewer. Built, altered, and updated   application tables on Oracle database
- Assisted functional analysts and prepared data mapping for conversion and developed conversion strategy
- Wrote an SQR to change the length of each value of the GRADE field in SAL_GRADE_TBL, SAL_STEP_TBL, and SAL_RATECD_TBL from one or two characters to three characters
- Wrote an SQR to check all rows in SAL_RATECD_TBL have a parent in SAL_STEP_TBL
- Updated existing PeopleSoft labels in the Time & Labor Self Service Weekly Elapsed Time page (and in related pages that these fields appear) to accurately reflect the information
- Created a batch process to calculate the Union dues for the Union participants
- Developed flat files using SQR for Direct Deposit in to the Banks for employees
- Worked with the tables to define Payroll process and Payroll Taxes Windows to setup Payroll information and maintain the information as it changes in the Payroll Data Panels
- Created an interface, which creates the payroll Contributions (deductions) tape for Select Benefits Health and Childcare
- Extracted tax balances to make tax adjustments in coordination with the payroll for a tax year
- Involved in organizing the payroll process using Paygroups, Paycalenders and Payrun Ids
- Generation of various Standard Reports in forms such as SQR, Crystal Report Writer like Employees Summary, Absence history, salaries, Salary plans, and Deduction, Taxes for HRMS/Payroll
- Tracked the usage of the company's vehicles using the Time and Labor module of PeopleSoft and transmitted the data to "Fleet Anywhere", an internal system
- Loaded data from flat files to various tables such as BEN_PER_DATA, BEN_PLAN_DATA and JOB in PeopleSoft database using Import Manager and structured query reports
- Developed an inbound interface that reads file from AON (Health Care & Insurance benefits)

Environment: Implementation of HRMS 8.0 - HR, Payroll, Benefits, Time and Labor

A.H. Belo Corporation, TX   **Sep. 1999- Nov. 2000**
Production Support

- Developed a W2 interface for employees of all the 41 companies for Pro Business Inc

- Developed a W2 interface for KTVK for modification from SSA to Pro Business format
- Modified PAY003.SQR to add company logo to the check and the advice
- Added Personal Hours Box with start, earned, taken, adjustments and end balance
- Moved Location to line below name and added location code and signature
- Modified DDP003.SQR to print zero net checks as advices
- Developed an interface to send Towers Perrin employee demographics and earnings data for processing pension each month
- Responsible for designing and developing interfaces to benefit providers like UNUM for Long Term Disability Benefits
- Created new Pages to incorporate an employee's consolidated Work Schedule, adding new Time Reporting Code functionality to the delivered Punch Time and Schedule Shift Pages, and adding new functionality to determine the various Schedule Types for Employees
- Created Employee Pay Audit Report, Employee Payable time and Paycheck reports using SQR, Query, and Crystal Reports. Worked on Payroll programs like Bond Purchase program, check print program and united way interface
- Generation of various Standard Reports in forms such as SQR, Crystal Report Writer like Employees Summary, Absence history, salaries, Salary plans, and Deduction, Taxes for HRMS/Payroll
- Wrote an SQR to transfer the benefit plan details provided by the vendor to the PS Benefit Plan tables
- Created headcount reports using SQRs and Crystal Reports and attached them to the Process Scheduler using the appropriate Flags/Parameters for batch processing.
- Developed a report to print individual employee performance over the last three years in terms of the overall rating using SQR.
- Performed chart field validations with the financial systems for all TRC entries that have accounting information required of them
- Developed/Modified various Carrier Interfaces for external partners such as Cigna, MetLife, Prudential, Caremark, Aetna Implementation of new Benefits in PeopleSoft 8.3

Environment: HRMS 7.5 - HR, Payroll, Benefits, Time and Labor

Education:
- JNT University Hyderabad, India
  - BTech in Engineering

Frank Nguyen
Senior OBIEE Architect

Summary:

Frank Nguyen is a Senior OBIEE Architect with concentration in Integration of a variety of eCRM, Business Intelligent and ERP solutions from Hardware, Software, and Network layer to Application layer. He has twenty (20) years of IT experience as an Engineer, Developer, Consultant, Project Manager, Program Manager and Technical Director of multiple, small to very large data and system integrations in information technologies.

- Hand-on installation, setup and configuration variety of applications including Siebel CRM, OBIEE10g &11g, Exalytics & Exadata, PeopleSoft, Informatica ETL, DAC servers, Oracle Fusion including Cluster setup, Infrastructure Administration and Architecture, Performance Testing, Security design and setup (SSO/LDAP/Custom)
- Experienced Technical Project Management in end-to-end OBIEE implementation with full lifecycle
- Excellent interpersonal and networking skills. Has a good attitude and a mellow character
- Expertise in cultivating a professional working environment that fosters original, creative, innovative concepts and integrity
- Experienced serving industrial segments that include Hi-Tech, Biotech, Pharmaceutical, Medical, Finance, Insurance, Banking, Consumer Goods, Telco, Travel, Not-For-Profit Organizations, and Restaurants

Skills:

- Over 20yrs of Siebel & Oracle OBIEE Implementation experience with full-lifecycle end-to-end implementation
- Expert in Financial application (FIN), Human Capital Management (HR), Supply Chain Management, Project Service Management, Procurement & Spending Management
- Project Management Practices including SDLC, Rapid Deployment, Black Belt Methodology, CMMI Methodology, Rational UML and Agile Methodology
- Hand on Infomatica ETL and Oracle OBIEE DAC server and client Installation, Configuration as well as development
- Oracle DBA, MS-SQL DBA, DB2 DBA and TeraData Tuning/Optimization. Sybase IQ & IQ Multiplex Implementation
- Call Center Integration including technology components and solutions such as Genesys CTI, Cisco ICM, Avaya CTI, AT&T G3 switch, Nortel Meridian Switch
- Expertise in implementing ERP applications such as Oracle EBS Application 11g and 12g, PeopleSoft 8 & 9, Essbase & Hyperion 11
- Mainframe systems including IBM OS390, IBM CICIS, Picks Systems
- IT Enterprise Architecture such as TOGAF, Zachman, SDLC/PMF, CMM and IRSC4
- Systems & Data Integration including WebLogic, WebMethod, IBM MQSeries, Mercator, BusinessBus, Vitria, Informatica ETL, IBM Data Propagator
- SAN & WAN Integration including Cisco Routers, Fiber Channel Switches Networks, Fiber Optic Networks, NAS and NFS network, Gigabit Networks
- Mobile computing technology including PDA, Handheld and Tablet devices

Professional Experience:

The University of Miami   **July 2013 – Present**
OBIEE 11g Solution Architect

- Installation and Configuration of Weblogic 10.3.6 and OBIEE 11.1.1.6.9 including Opatch upgrade

78

- Setup and configure Active Directory with Kerberos and Shibboleth using SAML2 Identity Asserter and Active Directory Authenticator
- Design and configure Authorization for data level security, object security using designated variables and filter values through RPD dimensions and facts tables
- Implementation of OBIEE & OBI Applications for Campus Solution, configuring and customizing installation parameters to meet specific requirements for ETL (DataStage, Shibboleth, Active Directory, Weblogic, OBIEE Presentation & BI Server)
- Logical/physical data design and modeling of the RPD metadata supporting custom hierarchies, star schemas, bridge (fact less fact) tables and column extensions to existing fact and dimension tables.
- Presentation layer design and modeling – 4 subject areas deployed via Answers for ad-hoc reporting
- Developed Dashboards/Reports (Prompts, Drill down, Hyperlinks, Visual Analysis, Ad-hoc, Slice/Dice ,Alerts (iBots), Graphs, Guided Analytics, custom CSS configuration)
- Perform daily Webcat/RPD migrations & promotions
- Design Multi User Development environments including Merge processes
- BI Server (RPD) configuration (i.e. connection pools, cache configuration, data level security, LDAP authentication, write-back, act as/proxy access, variables and initialization blocks)
- Report Security configuration for web catalog objects and object level security
- Supported repository migrations for development cycles, and patching maintenance
- Deployed optimization techniques for improving performance of ETL and reports (SQL tuning, cache configuration, optimize joins, indexing and best practice report configuration)
- Designed and deployed a custom incremental load solution delivering data refreshes per the customer's SLA, constructing the design within the PeopleSoft source system to support incremental data capture
- Platform migration of OBIEE, DataStage and ETL on Linux Red Hat 5/Oracle 11G R2 environment
- Designed automated data validation metrics and ETL performance reporting subject areas for technical KPIs
- Gathering and analyzing client requirements, leading design sessions
- Responsible for training and knowledge transfer to the client technical team of 10, including system administrators, DBAs, solution architects and reporting/business process analysts encompassing all aspects of OBIEE/OBIA, ETL & ActiveDirectory setup, configuration, design, development and maintenance

Praxair, Inc.   **July 2012 – March 2013**
Sr. Exalytics & Exadata Solution Architect and Administrator
- Worked closely with Oracle Consulting Services Group (OCS) to provide architecture, solution and layouts roadmaps to client (Praxiar) including migration/promotion strategy through project life-cycle
- Worked closely with Oracle Advance Customer Support (ACS) Engineer to install, configure and setup Oracle Exalytics including Essbase components in a high-end cluster through fiber channel and Gigabit networks.
- Individually hand-on in setup, configured and managed Exalytics (TimesTen database and OBIEE 11g Exalytics cluster) environments (Dev & QA) to support agile project deployment cycles.
- Designed, developed and built both Analytics ad-hoc and dashboard Reports
- Designed, developed and built RPD and Web Catalog Business Intelligent objects and reports (for analytic and reporting)
- Designed, developed and built Business Intelligent data model, aggregates, surrogated & system keys
- Provided estimate and capacity sizing needs to client on Exalytics & Exadata
- Configured Kerberos SSO in OBIEE 11.1.1.6.6 BP 1 Exalytics Cluster environment for Dev, QA, Prod

- Manually generated aggregates scripts by using aggregates persistent and summary advisor utilities
- Automated as well as manually run aggregates scripts to build aggregates in TimesTen and Exalytics databases
- Worked closely with both support web and product engineer to log defects and bugs and Oracle delivery manager to have the fixes turn around quickly to keep project moving
- Worked closely with infrastructure group to implement a robust scheduling system to run ETL batches, purge cache, run Summary Advisor and build aggregates in TimesTen database
- Worked with Directors and project managers to provide solutions or alterative processes adapting to rapid deployment and agile lifecycle
- Analyzed Sources data for possible data cleansing and re-construction works.
- Provided high level estimation of the works against timeline and resources and a detail plan in MS project format.
- Worked alone as well as closely with other ETL developers to design and construct custom ODI mappings to bring data from JD Edwards EnterpriseOne FINS (AP, AR, GL, Billing, etc.) to OBIEE 11g/DW Exadata by batch loads per dimensions and facts
- Analyzed long running SQL statements & Data Analysis, Modeling and Design for bringing addition data from JDE EnterpriseOne to Exadata DW
- Provided recommendations, best practice processes to bring summary data vs. detail data feeds from JDE and Excels
- Worked directly with Oracle product engineers to apply proper configuration parameter to Exalytics pre, during and post data refresh processes
- Constructed scripts for nightly scheduling refresh of data using TIDAL software
- Imported Essbase cubes as a resources into OBIEE RPD
- Installed setup and configured Essbase components as part of Exalytics installation and configuration steps
- Setup user account and permission (security) through integration services
- Configured Weblogic SSO and SSL for Hyperion and Essbase Platform
- Installed and configured Essbase Studio client and created some cubes
- Managed and Troubleshoot all Essbase related issues

Battelle Memorial Institute   **April 2012 – July 2012**
OBIEE Solution Architect
- Completed analysis of data and estimates for the porting summary and detail data from custom report system such as Custom PeopleSoft and JD Edward applications to OBIEE including providing schedule timeline, technical complexity and resources required to perform the end-to-end works
- Provided inputs to infrastructure security as well as data security design – Site Minder LDAP SSO and Authorization for Row-Level Security
- Advisor and performed installation and configuration OBIEE 10g and 11g on RHEL 5.1 system thru out the entire project lifecycle (Pre-dev, Dev, QA, Prod).
- Performed complex SQL & Data Analysis, Modeling, Design and custom build schema to bringing addition data from PeopleSoft/JD Edward to OBIA 7.9.6 and DW
- Provided recommendations to best practice to bring summary data vs. detail data from PeopleSoft & JD Edwards to OBIA & DW
- Provided recommendations to best practice to bring and build order summary data vs. detail data to OBIA & DW (same for Inventory and delivery summary data vs. detail data)
- Designed, developed and built both Analytics ad-hoc and dashboard Reports (for analytic and reporting)
- Designed, developed and built RPD and Web Catalog Business Intelligent objects and reports
- Provided best in class solution to perform a report on Real Data and Historical Data on same report using segmentation in OBIEE 11g.

EBay, Inc.   **Jan. 2012 – April 2012**
EMGC 11g AMP Fusion Middle Ware Siebel 8.1 Consultant
- Installed, configured and stood-up over 130 servers for QA, PROD and DR based on MAA configuration
- Installed & configured AIX, Linux, Weblogic, OBIEE for Kerberos Authentication with Windows 2003 AD/LDAP
- Stabilized over 130 sever agents reporting over SSL connection to a 6 OMS nodes through a Cisco SBL
- Conducted knowledge transfer for the implemented Architecture and EMGC 11g technical training to production support team followed with L1 & 2 support processes
- Create OOTB and Custom Siebel Business Monitoring Metrics including system monitor and workflow application services monitor
- Generated detail system and user reports to showcase the EMGC 11g functionalities
- Installed and configured EMDIAG tools as well as trained the team how to use it
- Configure SSL/SSO to authenticated EMGC Agents thru Siteminder (Access Manager)

Starbucks Corporation   **Nov. 2011 – Dec. 2011**
OBIEE 11g System Architect/System Analysis
- Analyzed and performed health checks the current production environment for best practices and performance impacts and/or improvements
- Documented and recommended areas for improvement and/or impact (This is the deliverables)
- Performed CPU, Memory and Disk I/O activities analysis for optimal hardware utilization and capacity planning
- Designed, developed and built both Analytics ad-hoc and dashboard Reports
- Designed, developed and built RPD and Web Catalog Business Intelligent objects and reports (for analytic and reporting)
- Designed, developed and built Business Intelligent data model, aggregates, surrogated & system keys

Cox Communications   **Aug. 2011 – Nov.2011**
OBIEE Development Manager
- Completed estimate for the 10g to 11g Estimate (schedule, technical complexity and resources)
- Got over 10+ OBIEE 10g projects going into production without impacting the 11g upgrade
- Established 10g to 11g compatibility testing framework to support over 50+ other 10g projects to be upgraded
- Established 10g to 11g Cox Standard and Best Practices documentation as well as a SWAT team for reviews
- Architected and designed 11g RPD to meet Cox Standards & Best Practices
- Demonstrated to developers how to build complex reports in OBIEE 11g and BIP 11g for comparisons
- Upgraded the 10g to 11g onto development platform and moved to QA environment
- Lead a team to build OBIEE 11g cluster for Dev, QA and PROD including License negotiations with Oracle
- Worked with PMO teams to manage the ongoing 10g releases and reviews. Communicated any roadblock, issue, and changes that the teams need to be aware
- Worked with "Top-Notch" consultants from top consulting services companies like Accenture, Cap Gemini including BICG, Cognizant, Genpact and provided management directions and decisions
- Setup, Installed and configured OBIEE 11g/OBIApps 7.9.6 cluster supporting the EBS 11.x and 12.x Financial, Supply Chain Management and Order Management Modules including Procurement and Spending Modules
- Integrated OBIEE11g/OBIApps 7.9.6 with EBS security and SSO

- Installed & configured AIX, Linux, Weblogic, Hyperion, EBS and OBIEE for Kerberos Authentication with Windows 2003 AD/LDAP
- Performed FIT/GAP analysis for Estimation of how much customization needed for both the upgrade to OBIA
- Provided estimates to build reports for EBS Modules such as Order Management, Inventory Management & Delivery Management (Supply Chain Management)
- Designed, developed and built both Analytics ad-hoc and dashboard Reports
- Designed, developed and built RPD and Web Catalog Business Intelligent objects and reports (for analytic and reporting)
- Designed, developed and built Business Intelligent data model, aggregates, surrogated & system keys
- Demonstrated OOTB OBIEE11g/OBIApps7.9.6 on both platform – EiS Technologies & Oracle with Vendors

Euro RSCG New York, NY   **May 2011 – Aug. 2011**
OBIEE 11g Sr. Architect & BI Technical Manager
- Managed 12 employees/consultants
- Owned both OBIAPPS and Data Conversion Projects with multiple data sources including Mainframe and Linux
- Designed ETL loads with more than 100 million rows
- Designed, developed and built both Analytics ad-hoc and dashboard Reports
- Designed, developed and built RPD and Web Catalog Business Intelligent objects and reports (for analytic and reporting)
- Designed, developed and built Business Intelligent data model, aggregates, surrogated & system keys
- Lead several other teams to successfully conduct the analysis and migration works
- Hand-on installation, setup and configuration of the OBIApps 7.9.6 including Informatica ETL for PeopleSoft
- Hand-on installation, setup and configuration of OBIEE 11g in a cluster environment
- Installed & configured AIX, Linux, Weblogic, PeopleSoft & OBIEE for Kerberos Authentication with AD/LDAP
- Part of the technical team to analyze the functionalities meeting business processes and provide estimate for both fit and gap works
- Performed resource management and program management with weekly report to upper management (two CFO of the company – Euro Worldwide and EuroLife)
- Provide technical solution recommendation to Business VPs, CIO and CFO for a roadmap of 3yrs program management commitment from both business and technical teams (signed off by both CFO)
- Conduct building OBIEE 11g RPD & Reports to perform a demonstration of the solution to the CFO, CIO and various management teams
- Conduct training on the new platform and solution to other technical teams through the implementation and migration, conversion
- Provided cost estimate to implement the solution to management teams
- Part of PMO management team report directly to CFO on daily basic
- Completed and delivered FIT/GAP analysis, Current target architecture and solution, Estimate cost short term and ROI long term, Resource utilization and needed, demo of recommended solutions & frameworks

Department of Justice   **July 2010 – May 2011**
Architect/Development Tech Lead
- Acting as both Architect and SME Lead, my job is to design, develop and build both Analytics ad-hoc and dashboard Reports; design, develop and build RPD and Web Catalog Business Intelligent

objects and reports (for analytic and reporting needs), put together a showcase using Siebel CRM & OBIEE functionalities to department leaders/stakeholders.

➢ Provide the recommendations to monitor and tuning the system with specific steps and tasks to pin-down the system clogged. As a result of a month work, working with different groups and team members, the system performed as expected again. Team members agreed on causes and corrected appropriately in time.

➢ To continue the services to the department, I was assigned on to a different task for building an end to end solution showcase to different divisions using the Litigation Case Management System (Siebel) as the front end and OBIEE 10g as backend report including BI Publisher for any real time report as needed. My responsibility is to install, configure and setup OBIEE 10g system quickly and build several report s directly from the LCMS system to show the capability of OBIEE10g from both user functionalities and system integration capability (to other systems) to provide an end to end solution. Within two and half months, I have built two environments with full security enabled (SSO) and integrated with other systems including several reports directly from LCMS system.

➢ Design, develop and build both Analytics ad-hoc and dashboard Reports; designed, developed and built RPD and Web Catalog Business Intelligent objects and reports (for analytic and reporting) I then also provided demonstration of full OBIEE 10g functionalities such as building the reports from the ground up from RPD to Dashboard as well as Integration capability showing real data for target KPI & Factual on a Pivot Table, Gauge and Pie chart to their department leaders and stakeholders.

➢ Build reports for ATR division using OBIEE 11g substitute for some of the functionalities that Business Objects could not provide. In addition, I also need to show how the OBIEE 11g integrate with JDev, APEX and WebCenter thru Web Services. Within the first two weeks I was able to bring up the OBIEE 11g on an Advance 64 bit Linux platform, and within 4 weeks I had several reports with their real data displayed on Dashboard and BI Publisher 11g. My job is to design, develop and build both Analytics ad-hoc and dashboard Reports; designed, developed and built RPD and Web Catalog Business Intelligent objects and reports (for analytic and reporting). Hence, I started to work on integration with JDev, APEX and WebCenter thru Web Services Calls. In addition to the integration, I also develop two reports with a Write back capability which allowed users to insert and update data thru OBIEE 11g front end.

Freddie Mac - McLean, VA   **July 2009 – July 2010**
OBIEE Architect/Administrator/Developer
➢ Served as a subject matter expert (SME) on OBIEE and OBIA 7.9.6 to business groups including expertise in OBIEE components such as Oracle BI Server, Oracle BI Answers, Oracle BI Interactive Dashboard, Oracle BI Publisher, Oracle BI Scheduler, Briefing Book as well as Tech

➢ Lead in the design and development of RPD, data model, dashboards and reports. Installed and configured OBIEE 10.1.3.4.1 on all environments – Dev, SIT, UAT, Performance and Production including Hyperion Essbase integration.

➢ Designed and implemented Dashboard user-base report security integration with PeopleSoft application security. Supported project team un-conditional to meet project timeline/schedule. Installed and configured SSO/SSL end to end on all environments.

➢ Setup version control with clearcase and allow developer to check-in/checkout in a MUDE environment. Performed Stress/Performance Testing before going live.

➢ Performed code, webcat and rpd migration and releases in a Linux environment. Trouble-shoot and resolved date-to-day issues.

➢ Owned and supported all environments including Production and Disaster recovery processes. Worked closely with all involved parties to lead, drive and participated in daily deliverables.

➢ Worked closely with ETL/DAC team to implement and deploy out of box OBIA 7.9.6 application including design and customization of those process jobs to meet business requirements. Installed and configured OBIA 7.9.6 and DAC server/client on RH Linux 4 platform. Worked with ETL/DAC developers to design and deploy both out of box and custom "container" from Dev thru

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Prod deployment. Coordinated with all involved parties for loading and testing data population including regression testing.

➢ Imported Essbase cubes as a resources into OBIEE RPD. Setup user account and permission (security) through integration services. Configured Weblogic SSO and SSL for Hyperion and Essbase Platform. Installed and configured Essbase Studio client and created some cubes. Managed and Troubleshoot all OBIEE, OBIA, Hyperion and Essbase related issues for FreddieMac.

➢ Built and develop RPD and Webcat reports including star and snowflake schema, create joins, hierarchy and Alias as part of development works. Performed L3 support for production issues, fixed bugs/defects during all lifecycle of the project. Reviewed and developed RPD and Webcat reports as needed to support additional requirements that considered as enhancements during the project. My day-to-day job is to design, develop and build both Analytics ad-hoc and dashboard Reports; design, develop and build RPD and Web Catalog Business Intelligent objects and reports (for analytic and reporting)

➢ My additional deliverable was also to design Informatica ETL mapping and workflow jobs including DAC execution plan which was part of OBIA 7.9.6 package. Designed autosys script to perform both one time load and nightly incremental loads in UAT and production (including manual if needed). Drive report testing for template, dashboard, user security base on role id, data validation with business to close the UAT sign off.

United Airlines   **April 2009 – June 2009**
OBIEE Architect/Project manager

➢ The current scope of OBIEE project is to convert some of the current Brio reports to OBIEE and then later probably other reports as well. As an OBIEE Architect on this project, one of the top priority is to setup the environments and at the same time mentoring the team to answer any of the questions that they have during the migration, setup plan/strategy for migration, working with project manager and other architects to identify any pitfalls, then come up with mitigation plan to make sure the project is successful.

➢ The deliverables are to setup, install and configure the environments on Red Hat Advance Linux – sandbox, development, QA and Production as well as developer's laptop/desktop and MUDE. Configuring OBIEE with chain SSO/LDAP authentication, OBIEE/SSL encryption, User to Group authorization, user to group assignment, nightly batch synchronization for user list from LDAP, setup Scheduler, Usage Tracking, Publisher, Cache Purging Event Table, OBIEE Cluster, Merge and check-in/check-out processes, version control during development and migration. Develop and design overall environment architecture that meets UAL standards and needs/requirements including row and column data security and object security.

➢ In addition to Architect role, the other responsibility is to mentor and lead the development, infrastructure and BA teams to develop rpd and presentation reports as well as setting up the environments. Provided best practices and set RPD standards for development team to follow. Provide the best practice RPD architecture with different subject areas designs to meet both physical and logic Data Warehouse or non-Data Warehousing needs. Hand-on assessment and analysis of other reports tools to migrate to OBIEE and estimate what is the risk and cost/time associated with the project.

➢ Performed Query optimization and tuning on Tera data, DB2 and Oracle using Toad and DB Artisan in conjunction with OBIEE logs. Create various views and indexes on Tera data and DB2 for specific report needs. Design a "Logical" Enterprise Data warehouse against the Tera data warehouse and recommended the Tera team to reversed build at the physical model including Aggregate tables, views and indexes.

➢ Moreover, an ongoing demos and rpd/report development to provide proof of concepts to upper managements and business areas to address the company needs as well as to prove that the OBIEE can perform and meet the current reporting needs from variety data sources for both near real time and historic data sets. Therefore, my deliverable is to design, develop and build both Analytics

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ad-hoc and dashboard Reports; design, develop and build RPD and Web Catalog Business Intelligent objects and reports (for analytic and reporting needs)
➢ Provide demonstration of Siebel CRM suite specific to loyalty to UAL executives and upper management to provide 360 degree the overview of UAL customer for integration between Siebel CRM, OBIEE and Essbase (Hyperion) products. Perform some customizations to accommodate the demo/Proof of concepts to provide a feast able solution that works for UAL using UAL data.
➢ Mentor the BA team to conduct interviews and work with BA team on requirements gathering and templates where they can be more productive but also deliver the right information to development team

University of California at Berkeley   **Feb. 2009 – April 2009**
OBIEE Architect
➢ University of California at Berkeley is one of the many Universities that have adopted Oracle Business Intelligent Enterprise Edition to address the ongoing need of their BI reporting in the education arena.
➢ One of the typical package solutions that Oracle provides is the OBIEE Fusion Intelligent named after the PeopleSoft Fusion Intelligent Package developed by the PeopleSoft engineering using OBIEE tool.
➢ The product well-known for its rich content in Human Capital Management (HCM), Enterprise Performance Management (EPM), Campus Solution (CS) Warehouse and Student Registration.
➢ Part of the responsibility is to setup the out of the box environments including performing a quick data load thru Data Stage to demo the out of the box functionalities to the upper management at UC Berkeley.
➢ In addition, I have to design, develop and build both Analytics ad-hoc and dashboard Reports including design, develop and build RPD and Web Catalog Business Intelligent objects and reports (for analytic and reporting needs).
➢ Follow of the demo will be a project and budget commitment to roll out across campus with some customization where it is needed.

Wal-Mart   **Oct. 2008 – Feb. 2009**
OBIEE Architect/Project Manager
➢ Convert the current reports written in Java into OBIEE as quickly as possible, therefore, it's called Fast Track. The Fast Track project was owned and run by HP Consulting Services team.
➢ Identify any risk (both technical and non-technical) associated to the project and educate the HP and Wal-Mart teams to mitigate them in an appropriated fashion.
➢ Convert the current reports written in Java into OBIEE reports. The reports were divided into four areas such as Sales Floor, Inventory Management (IM), Backroom Scheduling and Front End register related. Each area has about 20 to 30 scorecards and each scorecard has about 30-40 reports.
➢ Develop the Front End scorecard (both rpd and presentation), which was the most challenging area where the design and development of Front End was on the fly and very late in the game comparing to Sales Floor, IM or Backroom.
➢ Design, develop and build both Analytics ad-hoc and dashboard Reports including design, develop and build RPD and Web Catalog Business Intelligent objects and reports (for analytic and reporting needs). By end of Jan 31, 2009 the Front End scorecard was signed off and ready to release into pilot and production environments at the same time with other areas. Design and development in parallel is the main silver bullet against the timeline requirement.
➢ Securely manage login sessions based on user id, department, and their roles against the data that they allowed to see and downloaded. In addition, the authentication of the OBIEE application through the Clear Trust sessions and SSO/LDAP.
➢ Leading the security design between multiple teams, the security requirement was accomplished and was deployed into the pilot by Jan 31st 2009.

Novartis US – Consumer Health   Aug. 2008 – Oct. 2008
OBIEE Architect/Project manager
  ➢ Novartis is one of the leading pharmaceutical companies worldwide. Probably, Novartis is the second largest pharmaceutical in the world. The project is located in Parsippany, NJ where the consumer health organizations headquarter is at.
  ➢ The project is to focus on implementing out of box Oracle Application HR 7.9.5 reports including Compensation, Human Resource Performance, Retention and Workforce Profile/Management.
  ➢ The idea is to keep simple as out of the box as possible so that the project can be completed in the short time, and as time goes by additional reports will be added. Part of the project is to setup, install and configure out of the box Oracle HR 7.9.5 package in a UNIX environment including the DAC server and client on Windows, and also identify the (report) data mapping requirement for the data load.
  ➢ Part of daily job is to hand-on installation, configuration and setup Oracle HR 7.9.5 Application in a UNIX environment. Perform Out of the box data load and mapping for both PeopleSoft 8.9 using both Informatica and DAC server/client.
  ➢ Perform DAC server and client configuration, setup, data load and administration. Redesign Informatica ETL & DAC mappings base on new requirements.
  ➢ Perform custom build for ETL and DAC for additional requirements to meet the PeopleSoft HR Performance Management, Compliant Management, Retention Management, and Workforce Management.
  ➢ Perform additional customization for Talent Management and Compensation Subject Areas.
  ➢ In addition to that, the deliverable is also to design, develop and build both Analytics ad-hoc and dashboard Reports including design, develop and build RPD and Web Catalog Business Intelligent objects and reports (for analytic and reporting needs)

Cox Communication   April 2008 – Aug. 2008
OBIEE Architect/Development Lead
  ➢ Provide consulting services for OBIEE system installation, configuration and setup in a Linux environment including OBIEE Cluster, Scheduler, MUD check-in/checkout processes, and migration from Dev to Test to Prod environments processes. Configure OBIEE/SSO/LDAP authentication. Working closely with project manager and business partners on expectations and deliverables.
  ➢ Perform and hand-on security role and row level base custom design & development for the new OBIEE application base on business unit and departmental structure dimensions.
  ➢ Perform and hand-on Oracle HR 7.9.5 Application installation, configuration and setup.
  ➢ Perform Out of the box data load and mapping for both PeopleSoft 8.9 and eBusiness Suite 11.5x and 12 applications using both Informatica and DAC clients.
  ➢ Perform DAC server and client configuration, setup, data load and administration. Redesign Informatica ETL & DAC mappings base on new requirements.
  ➢ Perform custom build for ETL and DAC for additional requirements to meet the PeopleSoft HR Performance Management, Compliant Management, Retention Management, and Workforce Management.
  ➢ Perform additional customization for Talent Management and Compensation Subject Areas.
  ➢ Perform additional design needs for eBusiness Suite version 11.5.x and 12 for Payroll, AR, AP, and Supply Chain and Product Sales subject area.
  ➢ Perform Analysis for current report for Call Center calls as well as segmentation the calls and design for those outbound and inbound calls reports.
  ➢ Perform Architecture design for data load and import into Data Warehouse for the reports. Redesign reports as needed base on group demands and functionalities/usages. Tracking monthly calls against billable calls base on agent performance.
  ➢ Provided Architecture and Administration in maintaining the OBIEE 7.9.5 HR and EBS environment in term of Performance and Scalability.

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➢ Perform both Dashboard and RPD development for HR and EBS and Campaign Modules. Consulting on OBIEE/Siebel Analytics on Administration and infrastructure environments for both windows and Linux. Performing cache purging and seeding design and development. The day-to-day job is to design, develop and build both Analytics ad-hoc and dashboard Reports including design, develop and build RPD and Web Catalog Business Intelligent objects and reports (for analytic and reporting needs)

➢ Responsible to provide estimation of timelines, resources and budget for the conversion from Business Objects to OBIEE. Is the development lead responsible for any questions that are arise from developers, administrators and other architects/leads on the project and assignment.

Medtronic Corporation   **April 2007 – March 2008**
Siebel OBIEE System Architect/Support Lead

➢ Overall System Architect as well as Support Lead to support Development, Testing and Production environments and infrastructures.

➢ Jobs involvement includes installation, setup and configure Oracle Business Intelligent (OBIEE 10.1.3.3) Dev, Test and Prod environments including OBIEE cluster.

➢ Upgrading, merging and deploying OBIEE repository, web catalog and rpd files from one environment to the other using intelligent in-house methods as well as archive and replication methods.

➢ Perform promotion releases and version control of the OBIEE releases onto each environment.

➢ Troubleshooting and resolving all related development, Test and Production issues on priority orders including mobile clients, delivers reports, security, expression, aggregations and user data visibility base on rdt values, sales keys, product keys and other primary keys.

➢ Daily activities include monitoring the Health of all Siebel servers in all environments and its own cluster, performing backups and archives, established disaster and retention strategies with custom automated scripts.

➢ Writing custom scripts to monitor the servers, the logs and ftp files, backup and restore files.

➢ Perform crash-dump analysis and troubleshooting crash while maintaining a high availability environment for Siebel users.

➢ Working with multiple business groups and individuals to perform production releases thru SDLC – Software Development Life Cycle – include unit test, system test, performance test and UAT test.

➢ Perform overall assessment and estimation of the engagement in term of expectation for cost, timeline and resources to get the OBIEE application deploy in production in time with other applications which is part of the Gen5 Centerpiece SAP upgrade. Performed analysis of all dependencies, implications and rationales of the implementation landscapes to bring the success level higher and risks are low.

➢ Design and build OBIEE data level security base on external database content security namely CONSEC model to deliver an intelligent authentication mechanism with Row-Level security. The design incorporates Single Sign On, LDAP authentication, RDT values, Product Keys reflecting user id and departmental id/organization id.

➢ Perform Architecture and Design reviews, approve design and system architecture and sizing base on business needs and user requirements. Modify requirements as appropriate while working with both developers and business users to achieve the best technical outcome of the design that would meet the requirements and expectation.

➢ Configuration and build the reports, Meta data and rpd namely for all relevant subject areas include but not limited to aggregation, calculation, hierarchy, joins and logical stars and snowflake schema. Using Answer to model and build the designated Ad-hoc reports. Build reports base on the RPD presentation, Logical and Physical layers using Rational UML Methodology. As the day-to-day job is to design, develop and build both Analytics ad-hoc and dashboard Reports including design, develop and build RPD and Web Catalog Business Intelligent objects and reports (for analytic and reporting needs)

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➢ The projects also involved in migrating reports from other applications/tools (Business Objects and Cognos) to OBIEE. Part of the rpd/report development was also to review/analyze the BO reports to migrate to OBIEE.

Siebel Related Projects:
LPL Financial Corp   **Jan. 2007 – April 2007**
Siebel Technical Program Manager/Siebel Architect/Business Analyst

Lexis-Nexis   **June 2006 – Jan. 2007**
Siebel Technical Project Manager/Siebel Architect

Anheuser-Busch   **March 2006 – June 2006**
Sr. Siebel Analytics & CRM Administrator

Fidelity Investments   **Oct. 2005 – Feb. 2006**
Siebel Technical Manager

Procter & Gamble   **April 2005- Oct. 2005**
Sr. Siebel Infrastructure Architect

Schneider International   **Oct. 2004 – March 2005**
Sr. Siebel Infrastructure Architect

 Abbott Labs   **Sep. 2004 – Oct. 2004**
 Sr. Siebel Architect / Administrator

Siebel Systems, Inc.   **Nov. 2003 – Aug. 2004**
Sr. Siebel Application/ Analytics Consultant

RCI – Resort Condominiums International   **June 2002 – Oct. 2003**
Technical Director

American Red Cross   **Dec. 2001 – June 2002**
Siebel Architect

Home Shopping Network   **Sep. 2001 – Dec. 2001**
Sr. Siebel Solution Architect

 Compaq Computer   **June 1997 – Sep. 2001**
Sr. eCRM BI Technical Consultant

Education/Training:
   ➢ 3 years in DeAnza College in Computer Science
   ➢ 1 year in Saint Leo University
   ➢ Project Management Training
   ➢ Six Sigma Training
   ➢ Oracle DataMart & Data Warehousing Training

Certification:
   ➢ Siebel Certified Consultant
   ➢ Siebel Customer Certified Consultant
   ➢ Microsoft Certified System Engineer (MCSE)

Mike Martin
Senior OBIEE Consultant

Summary:

Michael Martin has over fourteen (14) years of experience in providing end-to-end business intelligence solutions by dimensional modeling designs, developing and configuring OBIEE Repository (RPD), Interactive Dashboards, OBIEE Answers, security implementations, Analytics Metadata objects, Web Catalog Objects (Dashboard, Pages, Folders, Reports) and scheduling iBots.

➢ Strong experience in developing and customizing Reports and Forms using Oracle Reports 10g/6i/4i Discoverer 10g/4i/3i and XML Publisher 5.6.3/5.6.2, OBIEE 10.1.3.x , OBIEE 11.1.1.7.1. Strong expertise configuring OBIA 7.9.6.2./7.9.6.4

➢ Experienced in Installation, Configuration, and Administration of Informatica Power Center Client/Server, Oracle BI Applications and OBIEE/Siebel Analytics

➢ Expert in upgrading OBIA applications 7.9.6.2 to 7.9.6.4 for all   modules which includes upgrading the Informatica Power Center Repository and migrating DAC 10.1.3.4. to 11g

➢ Developed Complex mappings in Informatica Power center from varied transformation logics like Unconnected /Connected lookups, Router, Filter, Expression, Aggregator, Joiner, Union, Update Strategy and more

➢ Expertise in DAC(Datawarehouse Administration Console) architecture and creating/assembling subject areas, custom execution plans and defining new Index/Table actions

➢ Very strong experience in developing OBIEE Repository (.rpd) at three layers (Physical Layer, Business Model & Presentation Layer), Interactive Dashboards with drill-down capabilities using global & local Filters, Security Setup (groups, access / query/report privileges), configured Analytics Metadata objects (Subject Area, Table, Column), Web Catalog Objects (Dashboard, Pages, Folders, Reports) and scheduling iBots

➢ Very knowledgeable with PeopleSoft 8.9, 9.1 ETL integration into OBIEE

➢ Strong knowledge in Dimensional modeling (Star Schema and Snow Flake Schema).

➢ Expertise in Administration tasks including Importing/Exporting mappings, copying folders over the DEV/QA/PRD environments, managing Users, Groups, associated privileges and performing backups of the repository.

➢ Expertise in Administration tasks including OBIEE security model roles and groups with integration into external directory Active Directory and OIM

➢ Experience in Administrative OBIEE production system and handling day-to-day issues

Skills:

➢ **Oracle Applications:** General Ledger, Accounts Receivables, Accounts Payables, Order Management, Inventory, Install Base, Fixed Assets, Cash Management, Purchase Order, Advanced Pricing, Service Contracts, Purchasing, AOL, System Administrator.

➢ **Application Tools:** Reports 10g/6i/4i, Discoverer 10g/6i/4i, Forms 10g/6i, XML Publisher 5.6.3/5.6.2, OBIEE 10.1.3.x.

➢ **Databases & Tools:** Oracle 10g/9i/8i/7.x, TOAD, SQL Navigator, SQL*PLUS,

➢ SQL* Loader.

➢ **Scripting Languages:** UNIX Shell scripts, K shell, C shell.

➢ **Languages:** SQL, PL/SQL, JAVA, XML, C, C++.

➢ **Operating Systems:** Sun Solaris, UNIX, Linux, Windows NT/XP/2000/98.

➢ **ETL Tools:** Informatica 8.x/7.x/6.x; Hyperion Solutions technologies: Brio – development; Hyperion BI+ Reporting Studio – development; Hyperion BI+ HFM System 9 administration, development; Hyperion Enterprise - administration, development; Hyperion Essbase System 9 - administration, development; Hyperion FDM

(Upstream Weblink DM) –   development
administration; Hyperion Planning -

Professional Experience:

Powell Industries   **Jan. 2013 – Present**
Architect/ Developer

- Performed the Installation and OBIEE Administration of the complete Analytics platform environment OBIA 7.9.6.4 and OBIEE 11.1.1.7.1 install required connectivity for seamless integration into the 11g DataWarehouse.
- Developed custom OBIEE dashboards using the out of the box star and fact tables from Analytics 7.9.6.4
- Configured Oracle Incentive Compensation Analytics, Sales Analytics using Oracle Data integrator (ODI) to move data from source to target
- Modify existing ETL jobs in Oracle Data Integrator (ODI)
- Develop data extracts from the data warehouse environment using ODI
- Created variables, sequences, user functions, scenarios, procedures, interfaces and packages in ODI
- Developed custom OBIEE dashboards and BI publisher reports from 3th party database source including RPD development
- Created OBIEE/RPD Dimension Hierarchies to achieve the drill down functionality as per Business Requirements
- Successfully implemented Oracle Financial Analytics and integrated FA with Supply chain and Order Management Analytics (SCM).
- Integrated data from Finance and other enterprise systems and transformed data using Informatica (ETL).
- Successfully Implemented Oracle HR Analytics and created separate execution plans for the daily refresh of the datawarehouse
- Setup OBIEE 11.1.1.7.1 security roles and groups with integration into external directory Active Directory and OIM, including SSO
- Configured the csv files required for the source independent load and source dependent load.
- Developed the repository model for the different work streams with the necessary logic that involved creating the Physical, BMM and the Presentation layer. Also created hierarchies, variables, and event poll strategies in the repository
- Developed complex stored procedures and call them in Informatica mappings to do the post ETL updates.
- Experience in performance tuning at the Database level by creating aggregate tables, Bitmap, B Tree Indexes, RPD level by creating Database hints in physical Layer, Tuning Reports.
- Defined the Primary, Foreign keys and created Simple and Complex joins between various Dimension and Fact Tables.
- Successfully merged the DAC subject areas for Financial Analytics with Supply Chain and created a single Execution Plan.
- Created task dependency, assembled the subject areas, build the execution plan and successfully tested the full & incremental load of Financial Analytics using DAC and Informatica.
- Involved with Oracle SME in developing queries to validate the data in Oracle Business Applications Warehouse (OBAW) against the source Oracle E-Business Suite (R12).
- Used Hints, Indexes and other tuning techniques to increase the performance of slowly running OBIEE 11.1.1.7.1 reports.

Allscripts   **Nov. 2011 – Dec. 2012**
OBIEE Architect/ Developer

- Senior OBIEE architect for converting salesforce.com reporting into OBIEE also as part of the ETL process migrating and mapping Sales Analytics CSV data into OBIEE metadata repository by configuring Informatica and DAC
- Installed and configured OBIA 7.9.6.3 including OBIEE, DAC, Informatica to support the following Analytics Sales and HR. (Linux Environment)
- Configured Oracle Incentive Compensation Analytics, Sales Analytics using Oracle Data integrator (ODI) to move data from source to target.
- Created several OBIEE dashboards to show complex lineage from source (salesforce.com) to target (Oracle Warehouse), this process include creating a new RPD and merging into the original 7.9.6.3 RPD to create reporting from OBIEE Answers
- Created all technical supportive and maintenance documentation for OBIEE environment including informatica/DAC ETL flow
- Implemented performance-tuning of OBIEE Dashboards/Reports and made changes to database by implementing the materialized views, partitions, re-building of indexes, overwriting the SQL execution path
- Designed and developed several OBIEE Metadata Repository (.rpd) by importing database tables into physical layers, forming dimensional and fact table schemas in BMM layer and customizing table and column definitions in presentation layer
- Developed multiple Drill-Down Dimensional Hierarchies in Business Model Layer and customized Presentation catalogs in Presentation Layer

Citizens Bank   **Dec. 2010 – Nov. 2011**
OBIEE Architect/ Developer
- Installed, Configured and Administration of OBIEE 11.1.6 upgraded to OBIEE 11.1.1.7.1 for DEV, TEST, UAT and Production
- Installed and configured Oracle BI Applications 7.9.6.2 including DAC, Informatica to support the following Analytics Financial, Projects and HR.
- Implemented performance-tuning strategy at OBIEE level such as cache management, aggregate table, schema re-customization
- Developed OBIEE Metadata Repository (.rpd) using OBIEE Server Admin tool by importing the required objects (Dimensions and Facts) with integrity constraints into Physical Layer using connection pool, developing multiple Dimensions (Drill-Down, Hierarchies) & Logical & Facts / Measures objects in Business Model Layer, and creating the Presentation catalogs in Presentation Layer
- Developed customized OBIEE reports and interactive dashboards with various contents and functionalities including drill-down, navigation, advance filter, conditional format, union reports etc.
- Developed several OBIEE BI publisher Reports to support existing OBIA financial dashboards as an enhancement .
- Wrote all AIM documentation to support the OBIEE environment including ETL
- Conducted training sessions for end users on OBIEE and OBIA Applications

Signal Defense Solutions   **Sep. 2009 – Nov. 2010**
OBIEE Architect
- Installed , configured and Administration of OBIA 7.9.6.2 this was a one man implementation where all BI components DAC, Informatica, BI Applications and OBIEE was installed to support the following Analytics.
- Financial Analytics - configure CSV files for Oracle Financial Analytics by mapping values from source systems to the domain values
- Financial Analytics - Configure DAC and Informatica for Financial Analytics ETL execution plan

91

- Supply Chain and Order Management Analytics - configure Domain Values and CSV Files for Oracle Supply Chain and Order Management Analytics
- Supply Chain and Order Management Analytics - Configure DAC and Informatica for Supply Chain ETL execution plan
- Procurement and Spend Analytics - configure CSV files for Oracle Procurement Analytics by mapping values from source systems to the domain values
- Procurement and Spend Analytics - Configure DAC and Informatica for ETL execution plan
- HR Analytics - configure Domain Values and CSV Files, create DAC and Informatica ETL execution plan
- Analyzed, Designed and Developed OBIEE Analytics Metadata repository (RPD) that consists of Physical Layer, Business Mapping and Model Layer, and Presentation Layer.
- Debugged BI Server, Presentation Server, DAC Server and Informatica Server including Client tools for performance and connectivity
- Conducted training sessions for end users on BI Applications

McDonalds, Chicago, IL   **April 2008 – Sep. 2009**
OBIEE Architect/ Developer
- Gather requirements and conduct interview sessions with end users.
- Translated Business requirements into technical requirements.
- Developed OBIEE dashboards and reports for E-BIZ 11i modules AR, AP, PCA and GL
- Participated regularly in Walkthroughs and Review meetings with Project Manager, QA Engineers and Development team.
- Upgraded OBIEE 10g to 11g including Metadata
- Created new requests and opened Answers for adhoc reporting to the End users.
- Developed Reports / Dashboards with different Analytics Views (Drill-Down / Dynamic, Pivot Table, Chart, Column Selector using Oracle BI Presentation Services.
- Customized Dashboard pages like Liquidity, Profit and Loss, Cash Flow, Income Statement and Balance Sheet in General Ledger Dashboard.
- Customized GL Detailed Trial balance report, GL Period to Date Balances reports in General Ledger using FSG's.
- Designed, implemented and tested security privileges on Dashboards and reports.
- Involved in Unit Testing and Performance Testing for reports.
- Prepared the training materials for the end users.
- Conducted training sessions for end users on BI tool.
- Environment: Oracle Applications R12 General Ledger, BIApps 7.9.6.2, OBIEE 10.1.3.4.1, Financials Analytics, Oracle 10g, SQL*PLUS, SQL*Loader, TOAD

Freddie Mac   **May 2007 – March 2008**
OBIEE Architect/ Developer
- Performed the Installation and configuration of the complete OBIEE environment and the required connectivity for seamless integration with the data warehouse.
- Installed and Configured OBIEE, DAC and Informatica on Unix/Linux Environment.
- Implemented OBIA 7.9.6.1 Financial , Order Management, Procurement, Spend Analytics and HR Anaintegrated data from Finance and other enterprise systems and transformed data using Informatica (ETL).
- Integrated OBIEE with EBS for Single Sign On (SSO).
- Setup Multi User Development Environment (MUDE) in OBIEE.
- Created new OBIEE requests and opened Answers for adhoc reporting to the End users.
- Designed and Developed Informatica Mappings from Scratch to Load the Data from Source System to Staging system and Warehouse System.
- Developed Reports / Dashboards with different Analytics Views (Drill-Down / Dynamic, Pivot Table, Chart, Column Selector, with global and local Filters using Oracle BI Presentation Services.

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92

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➢ Designed Schemas using Fact, Dimensions, Physical, Logical, Alias and Extension tables in OBIEE Administrator tool.
➢ Configured OBIEE iBots to deliver Analytics content based on schedule and automated iBots queries to obtain daily and weekly reports.
➢ Designed, implemented and tested security privileges on Dashboards and reports.
➢ Monitored Incremental and Full load Work Flows through Data Warehouse Administration Console (DAC) and Informatica WorkFlow Monitor.
➢ Customized Purchase Requisitions, Purchase Orders, Purchase Receipts and Employee expenses OOB dashboard pages in Procurement and Spend Analytics.
➢ Customized OBIA dashboard pages like Liquidity, GL Balance, Cash Flow and Balance Sheet in General Ledger dashboard.
➢ Customized OBIA dashboard pages AR Balance, Payments Due, Invoice Details and All AR Transactions in Receivables Dashboard.
➢ Customized OBIA dashboard Overview, Margins, Revenue, Products and Customers in Profitability Dashboard.
➢ Designed and Developed New Dashboard pages in General Ledger, Payables, Receivables, profitability, Procurement and spend and supplier performance Dashboards in OBIEE.
➢ Environment: Oracle Applications R12 General Ledger, Account Payables, Accounts Receivable, Inventory, Order Management, Install Base, BIApps 7.9.6, OBIEE 10.1.3.4.1, Informatica 8.6.0, DataWarehouse Administration Console 10.1.3.4.1, Financials Analytics, Order Management Analytics, Procurement & Spend Analytics, Oracle 10g, SQL*PLUS, SQL*Loader, TOAD, Unix.

United States Marine Corps   May 2006 – April 2007
OBIEE Architect/ Developer
➢ Responsible for the installation of OBIA 7.9.5.
➢ Installed and Configured OBIEE, DAC and Informatica on Unix/Linux Environment.
➢ Developed complex mappings using Informatica Power Center Designer to transform and load the data from various source systems like Oracle, flat files and loading to Oracle target database.
➢ Setup Multi User Development Environment (MUDE) in OBIEE.
➢ Worked using Catalog manager to migrate web catalog between different instances.
➢ Created Dimensional Hierarchies and implemented Business Logics for Facts.
➢ Created and modified session variables, repository variables and initialization blocks in the repository building in OBIEE..
➢ Created reports in Answers and embedded them in Dashboards according to the requirements.
➢ Designed Schemas using Fact, Dimensions, Physical, Logical, Alias and Extension tables in OBIEE Administrator tool..
➢ Imported and Exported Execution Plan in DAC from one Instance to other Instance.
➢ Worked on the testing and validating the Repository in OBIEE.
➢ Customized Dashboard Pages Like Total Spend Overview, Trends, Exceptions, Purchase Requisitions, Purchase Orders, Purchase Receipts and Employee Expenses in Procurement and Spend Dashboard in OBIEE. .
➢ Responsible for the design and development of execution plan in DAC which will call the Informatica workflows and updates the Image tables.
➢ Monitored Incremental and Full load of Data through Data Warehouse Administration Console (DAC) and Informatica WorkFlow Monitor.
➢ Developed Order and Invoice Revenue by Product OBIEE dashboard for Procurement Analytics.
➢ Developed Order Revenue Growth Over Previous Year OBIEE dashboard for Procurement Analytics.
➢ Developed Cumulative Order Revenue versus Last Quarter OBIEE Dashboard for Procurement Analytics.
➢ Oracle Applications R12/11.5.10, General Ledger, Account Payables, Accounts Receivable, Inventory, Order Management, Install Base, BI Apps 7.9.5, OBIEE 10.1.3.4.0, Informatica 8.1.1,

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DataWarehouse Administration Console 7.9.5, Financials Analytics, Order Management Analytics, Procurement & Spend Analytics, Oracle 10g, SQL*PLUS, SQL*Loader, TOAD, Unix.

Standard Parking   **May 2005 – April 2006**
OBIEE Architect/ Developer
- ➤ Designed and Developed OBIEE financial dashboard pages in general ledger, payables and receivables.
- ➤ Implemented dynamic dashboard prompts to zoom into particular segments of the business in a performance-optimized manner.
- ➤ Used various Transformations like Lookup, Expression, Filter, and Joiner for cleansing and consistent data.
- ➤ HR Analytics - configure Domain Values and CSV Files, execute DAC and Informatica ETL
- ➤ Created OBIEE reports in Answers and embedded them in Dashboards according to the requirements.
- ➤ Optimized performance by tuning the Informatica ETL.
- ➤ Designed and developed various Dashboards that are Dynamic & Interactive with drill-down & drill-across capabilities with local & global filters.
- ➤ Developed an Interface for the Standard Items of Sales Orders Import in Order Management.
- ➤ Designed and developed Customer Interface, Auto Lockbox Interface.
- ➤ Developed an interface program using API for loading item On Hand quantity balances.
- ➤ Designed and Developed AP Check Printing Report, Invoice Detail Report by Supplier, Payment Schedule Report by using XML/BI Publisher.
- ➤ Developed AP Supplier Contact report that will provide detailed contact information about Vendors/Suppliers for communication purposes by using XML/BI Publisher.
- ➤ Designed and developed custom Dashboards.
- ➤ Developed Contract History Report using Discoverer in Service Contracts.
- ➤ Developed Give Service Report using XML/BI Publisher in Service Contracts.
- ➤ Environment: Oracle Applications 11i (11.5.10) General Ledger, Accounts Payables, Account Receivables, Order Management, Service Contracts, Install Base, BOM,WIP, Inventory, OBIEE 10.1.3.2.1, Informatica 7.x, XML/BI Publisher, Oracle 9i, Discoverer 10g, Financials Analytics , Windows 2000/NT, SQL*Plus, TOAD, Reports 6i , Kintana, UNIX

Oracle Software Corp.   **July 2004 – April 2005**
Oracle OBIEE Developer
- ➤ Design, Development, Implementation and Technical support of complex business custom extensions for Oracle Financials, Manufacturing modules.
- ➤ Designed, Developed and Tested Physical Layer, Business Layer and Presentation Layer of Siebel Analytics
- ➤ Install and Configure OBIEE Disconnect. Design and create dashboards, custom star schemas, and custom sourcing reports, customize Siebel Analytics metadata, create SQL scripts for local SQLAnywhere database, customize dashboards and customize informatica ETL loads in support of Disconnected Analytics
- ➤ Designed and recommended solution for custom processes flow integrated with standard applications.
- ➤ Involved in Open Sales Order conversion based on client specifications.
- ➤ Imported Items from legacy system into Oracle Inventory using the Standard Item Interface Program.
- ➤ Configured OBIEE iBots to deliver Analytics content based on schedule, automated iBot queries to obtain daily and weekly reports
- ➤ Used TCA API's for creating Parties, Party Accounts, Contacts, and Account Sites.
- ➤ Involved in Unit Testing and Performance Testing for reports.

- Involved in preparation of various documents like MD050, MD070 (functional & Technical Design) documents.
- Created and have setup Resources using public packages.
- Responsible for techno design documentation of the reports.
- Environment: Oracle Apps 11i General Ledger, Order Management, Inventory, Accounts Receivables, System Administrator, Oracle 9i, Reports 6i, Discoverer 4i, SQL, PL/SQL, SQL*Loader, Sun Solaris OS 2.8, Unix Shell scripting, PVCS

Teradyne Corp.   **July 2003 – June 2004**
OBIEE Developer
- Developed OBIEE Reports / Dashboards with different Analytics Views (Drill-Down / Dynamic, Cascading Style Sheets, Pivot Table, Chart, Column Selector, Tabular with global and local Filters) using OBIEE Analytics Web.
- Designed Customer Products Summary Report in Install base using Reports 6i..
- Worked on Service Contract interface program by using the standard API's.
- Generated Inter Company Transaction Detail Report, Open-Debit Memo Report in General Ledger using Reports 6i.
- Customized Supplier Payment History Report in Account Payables to meet client requirements.
- Created new custom reports in Discoverer 10g.
- Environment: Siebel Analytics ,Oracle Applications 11i General Ledger, Account Payables, Account Receivables, Service Contract, Install base, Shipping, Oracle 9i, Reports 6i, Discoverer 10g, SQL,PL/SQL, TOAD, Sun Solaris, Unix

Inter-Tel Inc.   **May 2002 – June 2003**
Siebel Analytics Developer
- Designed, Created and Tested Report in Siebel Analytics Dashboard and created the adhoc report according to the client needs. .
- Design Analytics Star Schemas for custom Analytics Dashboards. Design and create Informatica Workflows, Mappings and other supporting data migration programs. Populate designed Star Schemas using Informatica ETL. Create Analytics Metadata to support customer specific requirements
- Customized GL Detailed Trial balance report, GL Period to Date Balances reports in General Ledger using FSG's.
- Closed Order Outbound Interface, AR Customer Conversion, developed new reports and worked on customizations of OM Reports.
- Used standard open interfaces for Order import, AR Customers Conversion.
- Environment: Oracle Applications 11i, General Ledger, Account Payables, Account Receivables, Service Contract, Install base, Shipping, Oracle 9i, Reports 6i, Discoverer 4i, SQL,PL/SQL, TOAD, Sun Solaris, Unix

Hewlett Packard Corporation   **Feb. 1999 – April 2003**
Siebel Analytics Developer
- Worked on Journal Import to bring legacy journals from AP, AR and Posting in Oracle General Ledger.
- Involved in Vendor Conversion from legacy system to Oracle System.
- Designed and developed Aging Buckets report in Accounts Receivables using Discoverer 4i.
- Designed and Developed PO Exception Report, Requisition without PO Report in Purchasing using Reports 4i.
- Designed and Developed Checks Invoice Details report in Accounts Payables using Discoverer.
- Customized Open Payable invoices by Vendor using Reports 4i in Account Payables.
- Developed the PL/SQL validation program for the Vendor Interface process.
- Environment: Siebel Analytics, Oracle Applications 11i/11.5.9 Account Receivables, Account Payables, Purchasing, Reports 4i, Discoverer 4i, Oracle 8i, SQL* Loader, UNIX & Windows XP

Education:
- Southern Illinois University
  - Bachelor of Science ~ Computer Science

C. Consulting Scope and Cost to University

3.2. C. #1. Demonstrate an understanding of the services the university requires under this contract.
3.2. C. #2 Explain the methodology the proposer will employ to fulfill the requirements discussed in section 1.1. while maintaining project scope and cost.

Knowledge and Experience Level

Implementation Methodology

EMS-IC utilizes an abridged version of the Oracle Unified Method. Our methodology is a flexible and scalable so that it supports a broad range of project types. As such, it must be flexible and scalable. The methodology allows us to base the project on a core set of activities that can be added to as needed, versus most methodologies that require activities to be eliminated in order to streamline a project.

Our methodology has the following advantages to the University of Central Florida:

1. **Flexibility** – This approach can be applied to many types of information technology software development and implementation projects. (Agile or iterative).

2. **Quality** – Our approach is iterative and incorporates testing and validation throughout the lifecycle, rather than extensive testing only at the end of the project.

3. **Cost Effective** – We help control project expenses by using a flexible structure that allows you to perform only necessary tasks.

4. **Reduced Project Risk** – The focus of each iteration in our methodology is to identify and reduce the most significant project risks. In this way, we help address the most critical project risks as early as possible in the project. This results in a reduction of schedule and budget risks.

Minimizing Customizations

EMS-IC has invested in developing reusable SOA frameworks leveraging a variety pre-built web service solutions. We have delivered EBS upgrades and implementations in a new transformational way by creating solutions that allow you to remove modifications to the core ERP during an implementation or upgrade, while satisfying your unique business needs. One of the advantages to this approach is that customizations built in this way can be migrated to newer versions of the ERP with minimal if any changes to the solution.

Because of our SOA skills and understanding of the challenges facing higher education today, EMS is often selected by Oracle to represent and demonstrate solutions built on Oracle's platform and Enterprise Applications (EBS) to showcase their SOA to the university market.

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Design or Redesign of current Business Processes

In practice, we are able to leverage Oracle's model- and repository-driven tools to build on Oracle's ERP solutions and extend, integrate, or redesign applications into custom solutions and vertical business processes. Our methodology and delivery model focus on the use of reusable frameworks developed through data models and process models, not through coding of any kind to the core applications.

EMS-IC's position is more ambitious in enhancing and re-creating Oracle's enterprise applications suite with a component-based services model, we are building process enhancement packs (PEP's) in conjunction with Oracles developer tools and SOA suite. This methodology and approach will change the upgrade and implementation approach for institutions moving to versions 12i functionality. This will fall in line with Oracle's Fusion Application Strategy that will consist of a web services based approach.

Strategic Planning

EMS-IC has assisted their clients with all applications and technologies that Oracle has acquired over the last 15 years. We work strategically with many of our clients to develop a 3-5 year technology plan by leveraging and/or cross-pollinating many application platforms from Oracle.

We have addressed clients with multiple applications and technologies and guided each of them on future facing strategies that encompass better utilization of various technologies or applications from Oracle.

Knowledge transfer to client resources

EMS-IC has practiced its knowledge transfer to the WVU staff relative to SOA training and integration. We have put in place a methodology, which allows university staff to shadow EMS-IC experts in all aspects of the development lifecycle. This training and knowledge methodology has helped the internal staff at WVU tremendously. In fact, we assisted remotely even after our contract ended to ensure that WVU and Kate Hazen's team was successful. This partnership approach has been mutually beneficial for both parties.

Financial Guarantee of Performance/Fit

EMS-IC will be happy to provide UCF a one week "no questions asked" guarantee on all consulting assignments.

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3.2. C. #3. The proposal shall specify billing rates for the various personnel who will be involved in the activities.

Area of Expertise	On Site		Off Site	
	Less than 6 months	Over 6 months	Less than 6 months	Over 6 months
Project Manager	$ 225.00	$ 215.00	$ 205.00	$ 195.00
Oracle/PeopleSoft Functional Consultants - Campus Solutions/Grants	$ 205.00	$ 195.00	$ 185.00	$ 180.00
Oracle/PeopleSoft Functional Consultants - Financials	$ 195.00	$ 190.00	$ 185.00	$ 180.00
Oracle/PeopleSoft Functional Consultants - HCM	$ 195.00	$ 190.00	$ 185.00	$ 180.00
Oracle/PeopleSoft Campus Technical Programmer/Developer Consultant -	$ 195.00	$ 190.00	$ 185.00	$ 180.00
Oracle/PeopleSoft FIN/HCM Technical Programmer/Developer Consultant -	$ 185.00	$ 175.00	$ 170.00	$ 165.00
Oracle Database Administrator	$ 165.00	$ 155.00	$ 145.00	$ 140.00
Oracle Enterprise Portal Consultant	$ 195.00	$ 185.00	$ 175.00	$ 170.00
Oracle/PeopleSoft Security and/or Workflow Administrator	$ 195.00	$ 190.00	$ 180.00	$ 175.00
SQL Server Database Administrator	$ 145.00	$ 135.00	$ 125.00	$ 115.00
Testing Lead Consultant	$ 185.00	$ 175.00	$ 165.00	$ 155.00
Technical Architect/ Tuning Consultant	$ 195.00	$ 185.00	$ 175.00	$ 165.00
Learning Management Systems Developer	$ 125.00	$ 120.00	$ 110.00	$ 105.00
3rd Party[2] Application and Web Developer	$ 145.00	$ 135.00	$ 125.00	$ 120.00
Salesforce System Developer	$ 135.00	$ 125.00	$ 115.00	$ 110.00
On-Demand Sr. Specialist	$ 200.00	$ 195.00	$ 185.00	$ 180.00
On-Demand Specialist	$ 185.00	$ 180.00	$ 175.00	$ 170.00

Note: The Fee Schedule above represents an "Up To" hourly rate ceiling which does not mean that all prices are at the maximum rate. This will allow more room for very rare high-end specialist.
EMS will always strive toward submitting the most competitive rates for the consultants listed above.
Note: We have added additional PSFT categories under Functional/Technical in order to leverage lower hourly rates.

99

3.2. C. #4. Describe in detail the costs to UCF under the terms of an agreement, if any, resulting from this ITN. A separate Statement of Work (SOW) agreement will be issued for selected services and quantity of hours after vendor selections are made. Include information about variable costs including travel.

3.2. D. Prior Experience with a Large, Complex, Multi-Campus Higher Education Institution

3.2. D. #1 Proposers addressing the systems administrator functions or the database administrator functions as described in section 1.1 must provide a list of current or very recent clients and projects explaining the system architecture and the project scope.

a. Vitera
   i. Responsible for the effective planning, provisioning, installation/configuration, operation, and maintenance of systems hardware and software and related infrastructure 24/7/365 environment
   ii. Responsible for implementing Office 365 and data migration from outlook
   iii. Updated disaster recovery procedures
   iv. Support of iSCSI/Fiber SAN, high-end network switches (Cisco), Dell Servers, etc.
   v. Daily support of VMWare needs.
   vi. Support of Windows 2008, 2012
   vii. Support of Project Server 2010/2012.
   viii. Performed optimizations and maintenance of MS SQL, Oracle, MySQL Databases.
   ix. Responsible for daily maintenance of Exchange 2010 and Office 365 during implementation and migrations.
b. Labtech
   i. Installation of the ConnectWise PSA software, as well as providing tier 3 technical support.
   ii. Software runs on an IIS web server and interacts with other external packages such as Microsoft Exchange and various managed services platforms.
c. University of Oklahoma
   i. Maintenance and administration of administrative and academic systems in a manner consistent with established policy and procedures with attention to current industry best practices.
   ii. Responsible for operational issues, providing first level of escalation support for all user-identified issues associated with our software licensing, Altiris, Systems Center Configuration Manager, AppV, Microsoft Remote Desktop Services, and VMware View systems.

3.2. D. #2 Proposers addressing the systems administrator functions or the database administrator functions as described in section 1.1 must provide a list of current or very recent clients and projects explaining integrations with third party application and the project scope.

a. TMS
   i. Provide for real-time PeopleSoft transactions
   ii. Deploy on-premise or VPN operation
   iii. Enhance support for on-premise operation, allow for operation on TMS or non-TMS supported hardware and operating system

> iv. Redesign of the architecture of the new PeopleSoft Real-Time Connector will:
> v. Conform to existing TMS Adapter process numbering scheme
> vi. Support existing TMS Adapter Command Instruction Set
> vii. Support all major OS platforms (Windows/Linux/Unix)
> viii. Support the identified PeopleSoft Modules in version 8.9, 9.0, 9.1 and 9.2
> ix. Enforce that no local configuration data be stored; rather all configuration data will be supplied centrally by TMS through its current Command Instruction Set.

b. Hillsborough County Clerk of Circuit Courts
> i. SSRS(report services) and/or Report builder 2.0, SQL, SQL Server Management Studio 2008, Microsoft Visual Studio 2008, and SSIS packages
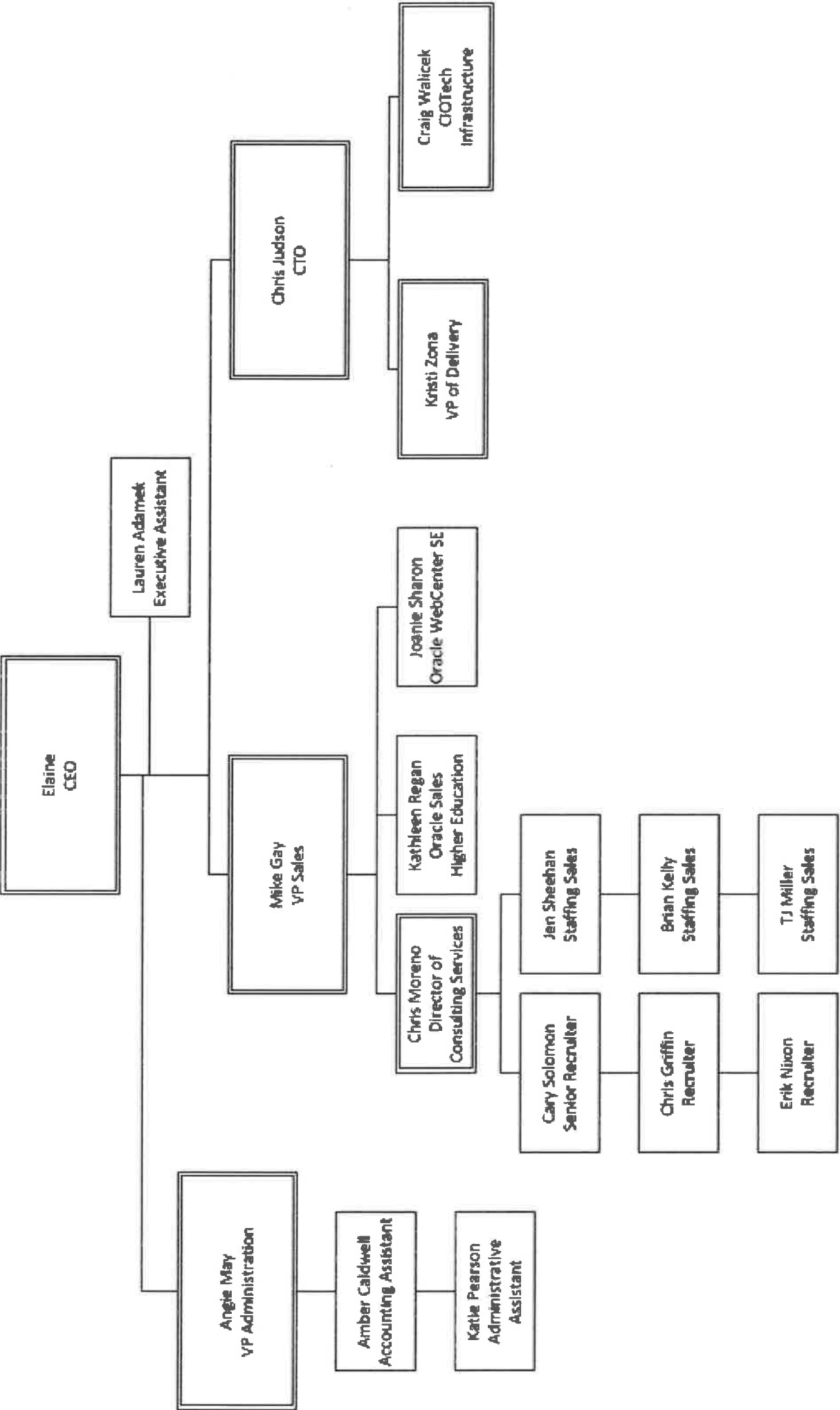
3.2. D. #3 Proposers addressing the PeopleSoft application and tools functions as described in section 1.1 must provide a list of current or very recent clients and projects explaining integrations with third party application and the project scope.

a) UNC Chapel Hill
b) Carnegie Mellon
> i. ConnectCarolina is a project that is working to provide the University with a fully-integrated administrative infrastructure supporting efficient and effective business operations. It is part of the Enterprise Applications division of Information Technology Services (ITS).
c) Miami-Dade Aviation

3.2. E. Demonstrated Ability to Meet Requested Project Time Lines

3.2. E. #1 Proposer must provide a list of current or recent similar-type projects as described in section 1.1. demonstrating their ability to estimate adequate resources and accurate timelines with successful deliverables.

All projects similar in scope are listed in the table "Clients" found on page 5.

101

Organization Chart

- **Elaine** — CEO
  - **Lauren Adamek** — Executive Assistant
  - **Chris Judson** — CTO
    - **Kristi Zona** — VP of Delivery
    - **Craig Walicek** — CIOTech Infrastructure
  - **Mike Gay** — VP Sales
    - **Chris Moreno** — Director of Consulting Services
      - **Cary Solomon** — Senior Recruiter
        - **Chris Griffin** — Recruiter
          - **Erik Nixon** — Recruiter
      - **Jen Sheehan** — Staffing Sales
        - **Brian Kelly** — Staffing Sales
          - **TJ Miller** — Staffing Sales
    - **Kathleen Regan** — Oracle Sales Higher Education
    - **Joanie Sharon** — Oracle WebCenter SE
  - **Angie May** — VP Administration
    - **Amber Caldwell** — Accounting Assistant
      - **Katie Pearson** — Administrative Assistant

WBENC | Women's Business Enterprise National Council

National Women's Business Enterprise Certification

hereby grants

EMPLOYER MANAGEMENT SOLUTIONS, INC.

to

dba

EMS Consulting- Intelligent Chaos

who has successfully met WBENC's standards as a Women's Business Enterprise (WBE).

This certification affirms the business is woman-owned, operated and controlled; and is valid through the date herein.

Expiration Date: 08/13/2014

WBENC National Certificate Number: 244240

NAICS Codes: 541512, 541511

UNSPSC Codes: 80000000

WBENC National WBE Certification was processed and validated by Women's
Business Development Council of Florida, a WBENC Regional Partner Organization.

Authorized by Nancy Allen, President & CEO,
Women's Business Development Council of Florida

State of Florida
Department of State

I certify from the records of this office that EMPLOYER MANAGEMENT SOLUTIONS, INC. is a corporation organized under the laws of the State of Florida, filed on July 2, 1998, effective July 1, 1998.

The document number of this corporation is P98000059529.

I further certify that said corporation has paid all fees due this office through December 31, 2014, that its most recent annual report/uniform business report was filed on February 28, 2014, and its status is active.

I further certify that said corporation has not filed Articles of Dissolution.

Given under my hand and the
Great Seal of the State of Florida
at Tallahassee, the Capital, this
the Twenty-eighth day of
February, 2014

Ken Detzner

Secretary of State