



TECHNICAL AND PRICE PROPOSAL

RESPONSE TO

INVITATION TO NEGOTIATE (ITN) NUMBER 1325JCSA
FOR
ERP CONSULTING SERVICES
FOR IMPLEMENTATION AND UPGRADES FOR PEOPLESFT APPLICATIONS,
PEOPLETOOLS AND ORACLE SOFTWARE AND HARDWARE

SUBMITTED TO

UNIVERSITY OF CENTRAL FLORIDA



UCF's Purchasing Department, Orlando Tech Center,
12479 Research Parkway, Orlando, FL 3282

KIND ATTENTION

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SUBMITTED DATE

JUNE 3RD, 2014

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Cover Letter:

To,

June 3rd, 2014

The University Central Florida
UCF's Purchasing Department, Orlando Tech Center,
12479 Research Parkway,
Orlando, FL 32826

Kind Attention: Cali Jones

Re: ERP Consulting Services - Invitation To Negotiate (ITN) Number 1325JCSA

Advance Digital Systems (ADS) is pleased to submit this **Technical And Price Response** to The University Central Florida for ERP Consulting Services for Implementation and Upgrades for PeopleSoft Applications, PeopleTools and Oracle Software and Hardware.

Advance Digital Systems (ADS), an Oracle Certified Gold Partner, has worked with several clients faced with similar challenges and tailored our support in line with their needs. Based on our initial understanding garnered from the ITN – ERP Consulting Services, and our experience working with similar environments, ADS has identified an approach to support this opportunity now and in the future as the program progresses. Our Team offers University Central Florida the following key value propositions critical to standing up a successful program:

- ☞ A qualified team of PeopleSoft FSCM, HCM and Campus Solutions Subject Matter Experts who have developed and applied leading tools and methodologies across Federal, State, Local Government agencies and Higher Educational Institutions
- ☞ An experienced team that has implementation, enhancement, support and upgrades of PeopleSoft Campus Solutions, Human Capital Management, Financials, CRM, Interaction Hub, PeopleTools 8.52 and higher, Academic Advisement, Mobile Web Development with integration to PeopleSoft applications and analytical tools including.
- ☞ A functional team that has depth and breadth of understanding of a multi-location Higher Education requirements, goals, and constraints
- ☞ A team that is quick in understanding and applying UCF's System Development Life Cycle (SDLC) methodology, IT Security Policy and Standards and Enterprise Architecture Framework, if any
- ☞ A team that can provide comprehensive assistance with systems administration and database administration functions applying patches, upgrades, performance tuning, server configurations and security.
- ☞ A team that can provide assistance in fine-tuning performance, configurations and security, and standing up in managing, delivering and overseeing large and complex programs

We are proud of our experience required for this assignment, and hope you will agree that we will be an excellent choice to assist UCF's in this endeavor. Our team understands the complexities of assignments such as this, and will leverage our combined skills and experience in conducting a thorough analysis with a well-qualified staff in developing a practical program that fully meets UCF's requirements.

We acknowledge the receipt of Addendum #1 dated May 20, 2014 issued by UCF containing answers to the Questions. **Ref Section - ITN Other Requirements.**

We have carefully reviewed UCF's requirements, goals, constraints and are submitting this **Technical And Price Response**. As an officer of Advance Digital Systems and the point of contact for this solicitation, I am authorized to submit this **Technical And Price Response**. Should you have any questions about this proposal, please do not hesitate to contact at (703) 585-5020. Thank you for your consideration.

Sincerely,



Ash Kapur
Senior Vice President
Advance Digital Systems
Phone: (703) 585-5020
Email: akapur@advancedigitalsys.com

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A. ADS Experience and Qualifications:

Advance Digital Systems Inc. (ADS) delivers results with excellence and consistency. This is a fact shared by each client for which we have provided solutions, services, or counsel since the inception of our company. ADS is a seasoned and qualified provider of Enterprise Application solutions viz., Enterprise Resource Planning (ERP), Enterprise Asset Management, Customer Relationship Management, and Managed Services (Hosting, Application Service Provider, technical staff augmentation, Operations & Maintenance) to clients in the public sector. Our capabilities are based on our understanding of the client's mission, solid technical and management skills, highly qualified pool of resources, and our processes for delivery that improve continuously. We have a proven track record of partnering with our clients in meeting their ever-changing needs.

ADS was founded in 2002 by a group of industry leaders from the 'Big 5' consulting companies, whose combined professional and business experience spans more than 120 years in Information Technology in Senior Management positions. ADS core business model is providing best-practice services to a full Oracle PeopleSoft and Oracle solutions life cycle management services within Public Sector, Transportation, Higher Education and Commercial industries. ADS' core business model is backed by a proven approach of providing Solution Architects who are committed to the success of their clients.

Name	Core capabilities
 	<p>ADS is a qualified provider of PeopleSoft ERP Solutions in FSCM, HCM, CRM, ELM and EPM. ADS specializes in ERP and Managed Services for Federal, State, County, Local governments & Educational Institutions. ADS offers Implementation, Development, Upgrade, and Operation & Support services focused on PeopleSoft. Performing Assessment Services, Business Process Reengineering, Requirements Analysis, Implementation Services, Upgrades & Performance Analysis, Enterprise Technical Planning & Architecture Review, Operations & Maintenance, Business Intelligence Services, & Infrastructure Consulting, as well as sourcing through our Managed Services division. <u>ADS is an Oracle Certified Gold Partner.</u></p>

ADS staff consists of over 225 IT professionals, with an average of 15 years of work experience. We have over 110 PeopleSoft professionals, both functional and technical resources, dedicated to PeopleSoft FSCM and HCM practices. Our staff maintains certifications in over 30 specialized fields, and more than 70 percent hold advanced degrees. Our staff supports clients in various roles, such as Project Managers, Business Analysts, Business Process Re-engineering, and Enterprise Resource Planning SMEs, and deliver the highest quality to end-to-end full life-cycle mission critical programs.

A.1 Overview and History of ADS

ADS is a PeopleSoft Consulting Services Company offering an array of customized PeopleSoft related solutions and services to Educational institutions and Public sector agencies. We have the adaptability and commitment combined with the vast experience and profound expertise of a large organization delivering similar services.

ADS is a premier provider of ERP Solutions to clients in Federal, State, Local governments, Educational institutions and several other Public sector agencies.

Following table provides our capabilities and experience, working with public sector agencies & universities in the last 5 years related to PeopleSoft 9.x FSCM, HCM and Campus Solutions implementations:

Assessment

We have expertise to perform a critical assessment of new capabilities and enhancements to current features provided in the new release. We have the expertise and experience with new capabilities and enhancements, and will demonstrate our value to client, by increasing productivity and lowering operational costs.

Experience/Reference: At the University of Maryland University College (UMUC), we were engaged to review the Oracle/PeopleSoft Enterprise application system by conducting an Assessment, Fit/Gap analysis to identify gaps in their existing process with PeopleSoft HCM/FSCM 9.1

Experience/Reference: At Stanford University, we conducted an assessment study of PeopleSoft Financials 9.1 and PeopleTools 8.52 focusing on Budgeting, Project Costing, Payroll & Timekeeping, Procure to Pay, Travel & Expenses, and Decision Support (Business Intelligence and Reporting)

Business Process Re-engineering (BPR)

We have expertise to lead a BPR effort, by guiding client's to understand, the processes that are available in the newer versions of PeopleSoft. We will provide a consolidated report that describes the proximity of currently followed practices and processes at several clients, against the process provided by PeopleSoft. We can provide a multi-phase plan to move the client processes through Package-Enabled Process Redesign, rather than clean-sheet reengineering. Package-Enabled Process Redesign considers the business model (collection of best practices) that is built into each of the PeopleSoft suite of products.

Experience/Reference: At the University of California Lawrence Berkley National Laboratory, we upgraded and integrated their PeopleSoft Financials and Human Resources System under the Financial Systems Modernization Project (FSMP) to eliminate redundancies, streamline financial processes, improve financial reporting, and achieve a measurably improved enterprise system

Experience/Reference: At Mecklenburg County, NC we conducted a Fit/Gap analysis and revised several Business Processes to streamline the financial reporting

Operations & Maintenance

We have vast experience to revitalize any underperforming ERP Projects that suffered from regulatory concerns, poor project management or an inability to satisfy contract terms. We will work with client at various levels, and evaluate processes and projects on a case-by-case basis to determine the state of existing Operations & Maintenance procedures. We will provide a comprehensive maintenance plan comprising of preventive and emergency maintenances, and contingencies devised for emergency maintenances.

Experience/Reference: At Virginia Commonwealth University (VCU), we provided Enterprise Technical Planning & Architecture Review of their infrastructure, and through our PeopleSoft Architects and Database Administrators, we provided Operations & Maintenance, Business Intelligence Services, & Infrastructure Consulting services, Interaction Hub and Mobile integration involving HCM, FSCM and Campus Solutions

Custom Applications Development & Integration – ERP Bolt-on

We have the expertise in reducing the bottlenecks posed by ERP through our technology advantage. We can work with client and provide a comprehensive execution plan that complements PeopleSoft implementation, employing specific rules to reduce several manual processes followed currently.

Experience/Reference: At Washington Metropolitan Area Transit Authority (WMATA) we performed a full-cycle upgrade of PeopleSoft FSCM by performing Requirements Analysis, Implementation Services, Upgrades and Performance Analysis

Business Intelligence & Data Warehousing

We believe Business Intelligence is a natural progression for an ERP system. We have expertise to establish a business intelligence data warehouse to unlock the data from PeopleSoft to provide a meaningful reports and business analytics.

Experience/Reference: At U.S. House of Representatives, we devised a roadmap to Implement a Business

Intelligence System utilizing Oracle Hyperion, and involved in Design and Implementation of such system, and Integration with PeopleSoft Financial Suite of Application. Also, implemented Oracle Hyperion Public Sector Planning and Budgeting applications.

Independent Verification & Validation Services

With our extensive experience in delivering Testing as a Service. We have proven methodologies, procedures, tools and metrics, to provide an objective assessment of process and customizations to our customers. We engage with clients very early in the project execution, to detect the defects for an early correction thus reducing the risks. We have vast experience in overseeing other System Integrator's (SI) PeopleSoft engagements by providing our Independent Verification & Validation (IV&V) Services.

Experience/Reference: At Washington Metropolitan Area Transit Authority (WMATA), we performed IV&V to assess aspects of the project that WMATA felt critical for their ongoing success of the project and support of the system, involving FSCM, HCM, eGrantsPlus a third-party human resources sourcing application integrating with PeopleSoft FSCM and HCM suite of applications.

Data Conversion Services

We have experience converting data from numerous legacy systems. We have a library of data conversion mapping tools, and we are equipped to advise customers on various data conversion strategies.

Experience/Reference: At Pension Benefit Guaranty Corporation (PBGC), as part of a two-hop upgrade process involving PeopleSoft 8.6 to PeopleSoft 9.1 involving FSCM and HCM suite of applications from Sybase on Linux to Oracle on Windows. The FSCM involved General Ledger, Purchasing, Payables, Billing, Receivables, Projects and Asset Management, while PeopleSoft HCM modules were Human Resources, Benefits Administration, Payroll, Time & Labor, Recruiting Solutions and Self Service

Key Differentiators

We have expertise in providing complete turnkey ERP (PeopleSoft) Solutions, from system integration and strategic Software Development right through to implementing IT solutions. Following are a few initiatives we feel will differentiate us from the rest.

PEOPLESOFT COMPETENCY CENTER

To expand our expertise in PeopleSoft related solutions, we have built a PeopleSoft competency center focused on developing and enhancing PeopleSoft technical and business expertise, to deliver a cost-effective and flexible PeopleSoft based solutions. Through this PeopleSoft competency center we resolve and cater to the client's PeopleSoft needs that include business strategy and ERP best practices. We provide consulting services focused on upgrades, maintenance, and integration of PeopleSoft systems. We have worked with Oracle Training and Consulting divisions, and have conducted several internal workshops for our staff, consultants, and clients who intend to develop their PeopleSoft skills.

UPGRADE LAB

In order to reduce ambiguity and optimal performance of the systems, we have an exclusive fully functional PeopleSoft Upgrade Lab that can simulate and conduct a **Test Move to Production Pass**. We can capture the timings of the move to production in preparation for the Production Cut Over. This will assure the University of Central Florida that Test Move to Production Pass is free of failures.

ADVANCE REQUIREMENT TOOL (ART)

In order to leverage our prior PeopleSoft experience, we have captured the formal requirements and fit/gap process into our home grown "Advance Requirement Tool (ART)". We will apply requirements management experience and our proprietary Advance Requirements Tool (ART) to quickly identify the standard and more specialized customer's system requirements. ART is designed to leverage the substantial requirements gathering efforts that ADS PeopleSoft implementation teams have gained from our numerous projects. ART has a

repository of features and solutions of universal requirements in Financial/Supply Chain Management, Human Resources (HR), Asset Management and Campus Solutions areas.

COMMITMENT OF SERVICE

Our differentiators are very important to us and it is our belief, they will help lead this project to a successful conclusion.

- ☞ **Senior Resources** – As an employee based company, we only hire senior, industry experienced consultants. Our resources average more than 10 years of PeopleSoft experience and 15 years of related functional / industry / consulting experience. Our team members on this project all bring expertise at the application, version and local government.
- ☞ **Tools** – All of our resources have access to our vast library of proprietary PeopleSoft upgrade and implementation tools that can be used to speed project timelines, mitigate risks and reduce costs.
- ☞ **Knowledge Transfer** - We believe in knowledge transfer throughout our projects, as well as during post-production; ensuring our clients understand and can continue to realize the benefits of the project long after we are gone.
- ☞ **Customer Satisfaction.** ADS believes in superior customer service by going beyond the letter and spirit of contracts. We are committed to going the extra mile to make all initiatives a complete success. This customer focus has won us both goodwill and accolades from our public sector clients who are also happy to be our references. We *define* superior customer service as follows:
 - Direct access to ADS Executives, great lines of communication
 - Rapid issue escalation and response time
 - Projects executed on time and on/or under-budget without exception
 - Providing only seasoned professionals who adhere to the highest ethical standards
 - Collateral and best-practices sharing
 - Thorough documentation and knowledge transfer
 - In the end, the UCF will recognize the business value with this implementation, justifying that the project goals were achieved.
- ☞ **Right Sized Company.** Unlike larger IT companies wrapped in rigid methodologies, ADS thrives on establishing and maintaining a collaborative working relationship with customers that cultivates flexibility and growth. Decisions are made rapidly and our management ensures that the company “flexes” to meet customer demands and not the other way around. Our personality is best described as **“Big enough to deliver and small enough to care, customers come first.”**
- ☞ **ADS’s Commitment** – At all levels, our organization, is completely committed to the UCF’s success on this project. We invest heavily in our clients to ensure we understand their environment, goals, future plans and nuances which make them unique, so that we may best serve them. The UCF will have direct participation from ADS Executive Leadership throughout this project, including participation at all progress and steering committee meetings. **We are committed to your success!**

A.2 ADS List Of Current / Recent Similar-Type Client Accounts

In this section, we are providing three (3) of Client engagements, which are similar in size and scope as of The University of Central Florida.

A.2.1 ADS Client Account 1: Virginia Commonwealth University (VCU)

Client Name	Virginia Commonwealth University (VCU)
Contact Name	Ravi Boregowda
Address	821 West Franklin Street, Richmond, VA 23284
Phone Number	(804) 300-0861

Email Address	rboregowda@mcvh-vcu.edu
Length of Service	September 2011 – Ongoing
<p>Advance Digital Systems (ADS) was chosen to provide <u>PeopleSoft FSCM Upgrade to version 9.1</u> at Virginia Commonwealth University (VCU). VCU has been utilizing PeopleSoft Financials and HCM since 2002. From 2011, ADS has been involved in the upgrade of their HCM Suite of Applications to PeopleSoft version 9.1, based on our proven expertise (<u>see section D below for HCM Upgrade experience</u>), as well we are chosen to provide upgrade of their FSCM to version PeopleSoft 9.1.</p> <p>We provided a comprehensive solution utilizing our Customization Reduction process that was effective and efficient. As part of the Customization Reduction, we aligned some of the VCU's legacy business process to PeopleSoft 9.1 delivered processes. In this engagement, our Upgrade Lab complemented onsite team's effort in timing the Move to Production pass. ADS used its Process Based methodology (Plan-Do-Check-Act) to sequence the upgrade to minimize the delay on the data move. We leveraged compare reports and Client documentation to modify the data load scripts to reduce errors in data store issues.</p> <p>We successfully went live and are currently providing O&M support. Our responsibilities to include, but not limited to;</p> <ul style="list-style-type: none"> • Provide functional support and issue resolution • Responsible to provide knowledge transfer • Responsible for Process Improvement • Provide System Performance Support • Configure the modules to align with VCU's business processes • Design reports needed to support monthly close process and address production issues • Conduct User Acceptance Testing (UAT) • Develop customized Crystal Report/XML Publisher reports • Support the on-going development activities in the areas of custom development, and interface development between Oracle Based Remstar, PeopleSoft and Maximo • Interface development between PeopleSoft and Maximo • Technical Design for the interfaces and custom development between and Maximo. <p>Modules supported: Project Costing & Budgeting with other FSCM modules including General Ledger, Accounts Payables, Accounts Receivables, Commitment Control, eProcurement, Strategic Sourcing, Inventory, Contracts, Grants, Asset Management, Billing, Cash Management, Purchasing, Banking, and integrating other peripheral systems.</p>	

A.2.2 ADS Client Account 2: George Washington University (GWU)

Client Name	George Washington University (GWU)
Contact Name	Humair Madhani
Address	2100 Foxhall Rd NW Washington, DC
Phone Number	(202) 716-1796
Email Address	hmadhani@gwu.edu
Length of Service	August 2009 - Ongoing
<p>Background: George Washington University (GWU) selected Advance Digital Systems (ADS) as one of its vendors to provide expertise and a range of services to support their Oracle/PeopleSoft Enterprise Suite of Applications including Financials, Human Resources, Campus Solutions and Enterprise Application Portal.</p> <p>GWU sought staff augmentation support in the labor categories such PeopleSoft Functional Analysts, PeopleSoft Developers, PeopleSoft Senior Functional Consultants, PeopleSoft Senior Developers, PeopleSoft Technical Architects, PeopleSoft Administrators, PeopleSoft Upgrade Specialists, PeopleSoft Trainers, PeopleSoft Project Managers, PeopleSoft Reports Developers, PeopleSoft UPK Developers etc.</p>	

Solution & Services: George Washington University (GWU) is an early adopter of PeopleSoft/Oracle's Campus Solutions product, serving as a beta for its development and implementing it early. Additionally, GWU use Oracle's PeopleSoft Financials, Human Resources and the Enterprise Application Portal.

ADS shall serve on these PeopleSoft/Oracle ERP projects as technology expert, to provide reports summarizing options and providing recommendations, serve as a technology advisor to understand, communicate, and propose solutions. Serve as a resource to research, implementation, troubleshooting and other technical tasks to support the efforts of GWU staff. Provide functional consultants to gather requirements, fit-gap, design and analysis. Our other services includes the following but not limited to;

- Provide continuity of consultants throughout the duration of the project.
- Implementation
- Development
- Project Management
- Architecture and Design
- Capacity Planning
- Installation and Configuration
- Performance and Scalability
- Conversion
- Training
- Implementation Support

A.2.3 ADS Client Account 3: US House of Representatives (House)

Client Name	US House of Representatives (House)
Contact Name	Kyle Griggs
Address	358 Ford House Office Building, Washington, DC 20515
Phone Number	(202) 226-0366
Email Address	Kyle.Griggs@house.gov
Length Of Service	
<p>Background: Since October 2010, the U.S. House of Representatives (House) has been using PeopleSoft Financials as its production financials application. The House is using version 8.9, tools 8.49, and the following modules: General Ledger, Commitment Control, Purchasing, Accounts Payable, Accounts Receivable/Billing, and Asset Management.</p> <p>Advance Digital Systems supports the U.S. House's PeopleSoft contract to cover the wide breadth and scale of PeopleSoft support required within the US House of Representative. ADS has been working with the House of Reps since 2011. ADS has performed on several tasks under this contract, managing each project in accordance with the required ISO standards, ITIL Service Management Framework and CMMI processes.</p> <p>Services & Solution:</p> <ul style="list-style-type: none"> • Support the House's ERP PeopleSoft Financials production application, as well as its continued development and testing, especially the PeopleSoft FSCM modules performing implementation, monitoring, processing, troubleshooting, reporting, and reconciling activities, and interaction with other modules • Assist with evaluating additional functionality and using current functionality in other ways to increase the benefits of the application for the House; and • Support the House's ERP PeopleSoft Financials integration with the Oracle Hyperion Enterprise Performance Management Public Sector Planning and Budgeting application and Financial Data Quality Management Adapter Suite • Support the House's ERP PeopleSoft Financials production application, as well as its continued 	

development, testing, and integration with a primary focus on the Accounts Receivable module, but also potentially with other PeopleSoft modules and related applications;

- Assist with evaluating additional functionality and using current functionality in other ways to increase the benefits of the application for the House, especially functionality related to debt management. Provide knowledge on configuration, processing, and reporting that can address the House's debt management requirements; and
- Assist staff with monitoring, analyzing, processing, troubleshooting, reporting, and reconciling Accounts Receivable activity
- Assist staff with the year-end close and financial audit activities. Analyze requests, extract data, run reports, verify information, and provide documentation;
- Assist with entry events and the interaction of the sub-modules feeding General Ledger; Support the House's ERP PeopleSoft Financials production application, as well as its continued development and testing, especially the General Ledger module; Assist staff with the year-end close and financial audit activities. Analyze requests, extract data, run reports, verify information, and provide documentation;
- Assist with entry events and the interaction of the sub-modules feeding General Ledger;

Financials: General Ledger, AP, AR, PO, eProcurement, Assets, Billing, Projects, Grants, Contracts, Cash Management, Risk Management, Deal Management, Commitment Control (KK), Strategic Sourcing, Travel & Expenses, Oracle Hyperion Public Sector Planning & Budgeting

A.3 ADS Statement Of Client Accounts Lost

Since inception of our company, ADS has not lost any Client Accounts through early termination or non-renewal of contracts.

A.4 ADS Organization Company's Chart

ADS is pleased to provide any required information about our company to the UCF, to evaluate our stability and ability to support the commitments set forth in response to the ITN. ADS is incorporated in the Commonwealth of Virginia, and has only one office located in Fairfax, VA. Our Organization Structure is described in Error! Reference source not found.

We have extensive experience working within demanding timeframes for our clients. We have demonstrated our ability to manage teams of specialists in a timely, responsive, and effective manner on many time-critical assignments. Our proven approach is based on the following principles:

Have a specific, single point of contact (POC) for all work - **Client Delivery Head**

- ☞ Have senior professionals involved in all work as necessary to ensure quality and timeliness
- ☞ Have appropriate technical staff available for each task assignment
- ☞ Provide a broad range of functional specialists to meet specific technical requirements
- ☞ Have available the technical resources within the firm and among our qualified subcontractors to provide the support needed to meet demands during peak periods of task assignments
- ☞ Draw on our existing knowledge of client operations and business processes.

The cornerstone of ADS's staffing plan is to assign senior professionals with specific expertise and experience relevant to this ITN. To fulfill this commitment, we will deploy a team of Senior IT Professionals who will meet and exceed UCF's ERP Consulting Services need. Error! Reference source not found. gives the onsite & offsite Teams reporting hierarchy.

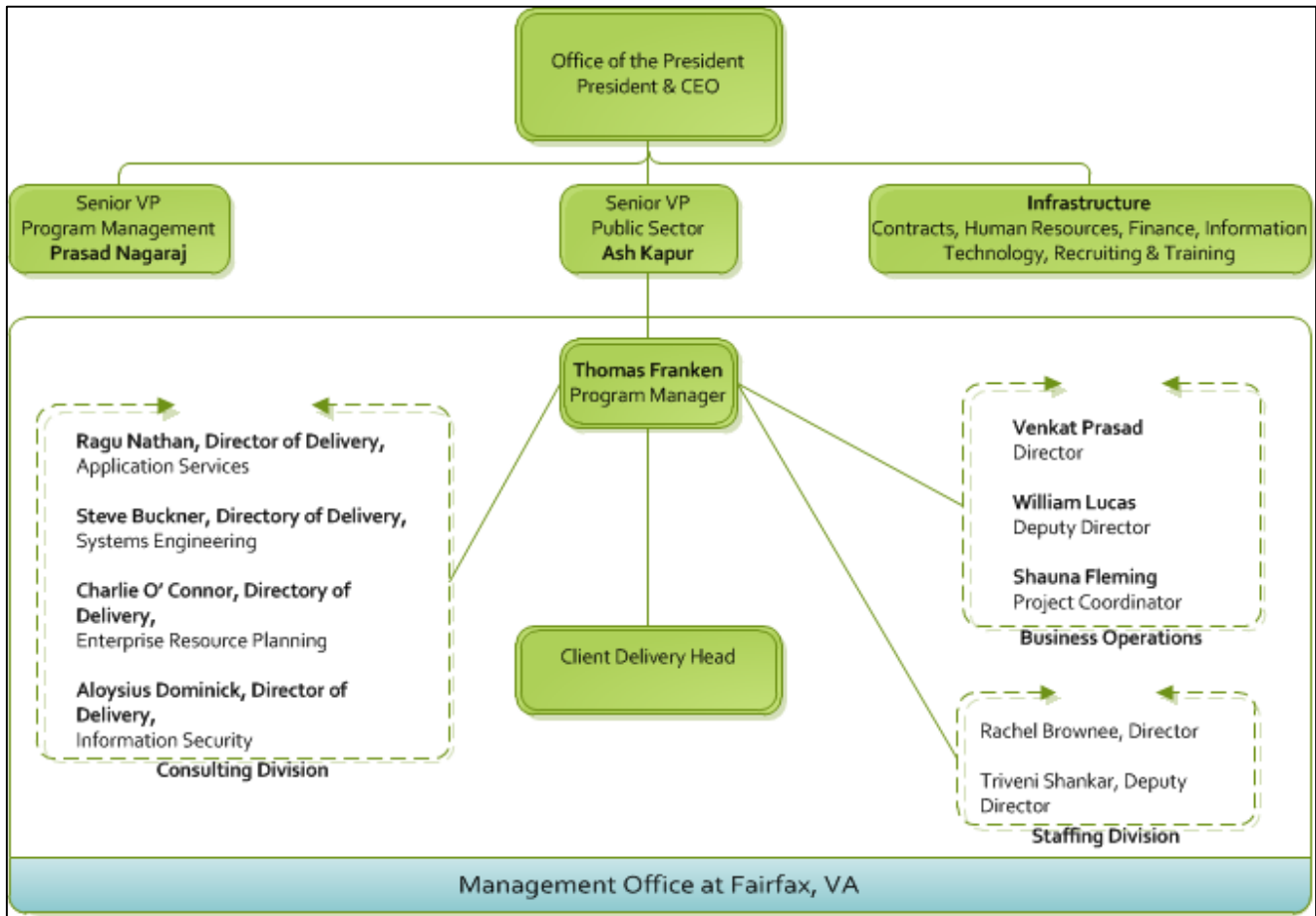


Figure 1: Organization structure

A.5 ADS Statement Of Number Of Years' Experience In Providing Services

ADS is providing IT Consulting Services since 2002, and specifically ERP Consulting Services utilizing products from Oracle, PeopleSoft, Microsoft and SAP for the last 10 years. We are a seasoned and qualified provider of ERP Consulting (PeopleSoft/Oracle) Consulting Services and Solutions to clients in the Public and Private sector including Higher Educational Institutions. As an organization, innovative solutions and delivery of quality services are high priorities to ADS. We have extensive experience with the implementation of the Information Technology Infrastructure Library (ITIL) and Capability Maturity Model Integration (CMMI), as part of our IT support services. We have experience tailored to any specific Agency using ITIL and CMMI best practices with its comprehensive checklists, tasks and procedures.

B. ADS Services Offered:

B.1 List Of ADS Employees

We have carefully reviewed the Invitation To Negotiate (ITN) Number 1325JCSA for ERP Consulting Services and Scope Of work, and are proposing the following personnel from our PeopleSoft Staff.

Labor Category	Name Proposed Personnel
1. PeopleSoft Project Manager	Paul Hunt
2. PeopleSoft Technical Consultant	Mallik Akula
3. PeopleSoft FSCM Functional Consultant	Katherine Wyatt
4. PeopleSoft HCM Functional Consultant	Aeliegh Rothwell
5. PeopleSoft System Administrator	Nakul Sharma
6. PeopleSoft Campus Solution Consultant	William Reiss
7. Database Administrator	Hyun S. Kim
8. PeopleSoft Trainer & UPK Developer	Krystyna Joniak
9. PeopleSoft Security Specialist	Angela Williams

Detailed resumes of these proposed individuals, are provided at the end of the proposal under **Appendix 1- Resumes Of Proposed Staff for UCF Account**. These individuals proposed above, will be available to work at UCF.

B.2 ADS Staff Skill Sets and Subcontractors Or Sub-Consultants Plan

Advance Digital Systems (ADS) will not subcontract any work resulting from this award to any contractors. Resumes listed in Appendix – A are all currently employed with ADS.

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C. ADS proposed Consulting Scope And Cost To The University:

C.1 ADS Understanding of the University's Service Requirements

University of Central Florida and its 12 colleges provide opportunities to 60,000 students from all 50 states and 140 countries. UCF is the nation's second-largest university, and is called a "Top Up-and-Coming" national university by U.S. News & World Report, a best-value university by The Princeton Review and Kiplinger's, and one of the nation's most affordable colleges by Forbes.

UCF is Inviting To Negotiate seeking ERP Consulting Services for Implementation and Upgrades for PeopleSoft Applications, PeopleTools and Oracle Software and Hardware services. As part of this, UCF intends to engage a PeopleSoft Consulting Organization to assist UCF in implementation, enhancement, support and upgrades of PeopleSoft Campus Solutions, Human Capital Management, Financials, CRM, Interaction Hub, PeopleTools 8.52 and higher, Academic Advisement, Mobile Web Development with integration to PeopleSoft applications and analytical tools, OBIEE and Hyperion. Additionally, as part of Systems Administration and Oracle Administration, it needs assistance in performing several Systems and Oracle Database Administration related activities related to patches, upgrades, fine tuning database, and performing server & security configurations. Assistance with database administration functions relating to upgrades, performance tuning, configurations and security.

C.2 ADS Proposed Methodology

Advance Digital Systems (ADS) has a reputation of delivering quality consulting services for over 12 years. We excel in providing consulting support, delivery of value-added solutions, and the ability to work with our clients to make logical and sound business decisions based on analysis of many complex variables.

Our approach: Throughout our long history of exemplary services to our clients, we have created a simple approach to building a successful delivery environment: create a partnership with our clients, create realistic expectations by developing a common set of goals, communicate early and often, and bring the right resources at the right time – using technology to enable success. Our methodology to fulfill the requirements, while maintaining project scope and cost is as per follows:

1. True Partnership by Inclusion
2. Effective Staff Deployment
3. Lower Attrition Rate – retaining Key resources for longer duration
4. Pro-Active Systems Management

Following sub-section describe each of the above points in detail.

C.2.1 True Partnership by Inclusion

Our approach is based on inclusion and ownership, a true partnership for a successful mission. UCF stakeholders will be involved from start to finish—defining mission requirements and business and operational needs, developing an assessment of technology and solutions, redesigning business processes and procedures, implementing change, achieving performance, modeling a learning organization, and declaring and owning program success. Our strategic approach to communications will establish bilateral exchange of information and ideas to ensure that needs and perceptions of interested parties are heard and addressed. Our communications approach focuses on making sure that involved parties know what to expect and are aware of the benefits they may accrue, and that management remains cognizant of diverse interests and the evolving positions of stakeholders.

C.2.2 Effective Staff Deployment

We are a technology expert organization, seasoned and qualified provider of Information Technology staff to clients in the Federal, State, Local Government and several other Public sector organizations, and Higher

Educational Institutions. We have been working with clients such as Federal Reserve Board, Washington Metropolitan Area Transit Authority (WMATA), US House of Representatives (US House), DC-Water, James Madison University, Virginia Commonwealth University, George Washington University, University of Maryland etc., on several Task Orders providing quality resources within the stipulated time and schedule of the Task Order. In addition to this, our resources that have been deployed for these clients have been performing above customer's expectations, and are key resources in several initiatives for these clients. Subsequent sections further provide our Successful Recruitment Strategy and Retention policy.

Meeting UCF Requirements: Recruitment Strategy - Our structured Recruitment Approach, described in this section, is based on the industry standard best practices. Our proven staffing approach has benefitted many of our clients to meet their staff augmentation needs. This will be further customized to the unique environment and operating requirements at the UCF. We are an organization of experienced IT Professionals, who have extensive working experience in multiple domains and understand the needs of a project execution team. In addition, we have experienced recruiters and subject matter experts who proactively streamline the hiring process based on the needs of each client, while also adapting to a changing market.

We will work with UCF's Program Manager on the candidate's requirements. Our sourcing of candidates starts internally, where we will match the UCF's requirements from the resources between projects. In a situation, we are unable to find a suitable candidate from our Bench strength, we will initiate the identification process and source candidates from multiple avenues. Following is the procedure:

- i. **COMPREHENSIVE SCREENING:** Our recruiters will apply their skills and experience in identifying the right candidate based on the requirements provided by the UCF. Our recruiters will seek our Technical team's help in understanding the technologies and variations that may exist in the technology in filtering the candidates identified.
- ii. **FORMAL INTERVIEW PROCESS:** We will conduct a formal telephonic interview in assessing the candidate's competency in technology expertise and communication. Once the candidate passes this initial technical screening, we will present the candidate to UCF for their evaluation process.
- iii. **CLEARANCE VERIFICATION:** ADS practice is to conduct background checks on all candidates before extending an offer of employment, verifying education, previous employment, performance, and capabilities. Upon selection by the UCF, we will hire external agencies to scrutinize the selected candidate's background, and additionally seek multiple references from the candidate in verifying the candidate's past.

C.2.3 Lower Attrition Rate – retaining Key resources for a longer duration

Our Staffing Deployment Strategy is described in the earlier section. **All Key Staffs and otherwise, identified and dedicated to an engagement will not be re-deployed to other engagements or projects.** Second, our recruitment policies, coupled with an industry standard approach have helped us towards retaining these qualified personnel for a longer duration with ADS. Third, we will be innovative and devise plans to retain exceptionally qualified staff at UCF. The approach identified above results in:

- High performing teams
- Reduced disruption and time spent in assimilating individuals into teams
- Creating benchmarks for team composition
- Increasing overall team performance

CONTINUITY STRATEGY: We have a well-defined retention policy backed by an excellent performance tracking system, and they are inseparable. Quality tracking/assurance begins with our own internal performance measurement. Our approach to performance measurement is **Management by Objective.** Subsequent sections below describe our approach, and **we will apply one or more** of these in retaining qualified personnel for a longer time.

- i. **RECOGNITION:** ADS's staff resources quality is measured through direct communication with the client. Our Account Managers will have regular discussions with the UCF during the course of the

engagement to gauge technical competency, attitude and attendance.

- ii. **PROMOTE:** ADS follows an innovative approach for resources to remain at ADS and we encourage our resources to enroll in a Continuing Education Program for their career advancement. We will promote certain resources, those who have shown exemplary skills, to the next level to handle additional responsibilities. It is proven that such resources, who get the additional certifications required for position and start to perform better.
- iii. **MENTORING:** ADS interacts with the UCF's Program Manager and receives feedback about the team members. We have a two-pronged approach on mentoring keeping the project schedule in mind. The action plan may be a simple vigor talk, a detailed discussion about the positives and negatives and a corresponding correction plan, or a detailed multi-stage and measurable action plan. We conduct open-house discussions or a two-way mentoring or a 360-degree feedback session, where resources express freely their experiences and factors that help them improve their performance.
- iv. **PROFESSIONAL DEVELOPMENT PLAN:** ADS professional development plan include the goals, required skill and competency development, and objectives our proposed resources needed to accomplish continuous improvement and career development. We will collaborate and work with UCF's Project Manager closely in identifying the necessary skills and resources to support our staff's career goals and the client's business needs. In the current scenario, we will define a development plan for our proposed resources post our discussions with the UCF's Project Manager. We have established **Practice Management Centers** in Enterprise Resource Planning (PeopleSoft/Oracle) Information Assurance, IT Systems & Security, Project Management, Data Warehousing, and Business Intelligence. We have qualified personnel in these practice areas and have built assets that help our clients to deploy solutions rapidly.

C.2.4 Pro-Active Systems Management

This section describes our approach towards applying patches, updates and upgrades to the system currently in use in UCF PeopleSoft environment. The section is further categorized to address the Upgrade Methodology and Customization Process Implementation, if any, at UCF.

C.2.4.1 Upgrade Methodology

The PeopleSoft Enterprise product has expanded significantly in functionality, scalability, usability, and reduced cost of ownership over the past few releases, including significant leaps made in the recent PeopleSoft FSCM/HCM 9.2 release.

This section guides you through the major areas we consider to meet UCF's project objectives. Based on current release of PeopleSoft Enterprise Software, we cover the upgrade best practices and aims to provide you with a framework for best possible upgrade agenda for the UCF.

From our vast experience in similar engagements, we consider many factors for the upgrade; such as support periods, functional capabilities, technical infrastructure, and underlying business needs. Based on these factors, we design the most appropriate upgrade strategy.

Before pursuing this upgrade project for the UCF, it is imperative that we fully understand the upgrade process, potential upgrade paths, and most importantly criteria for UCF's objectives.

Upgrade Process: An upgrade project is in many respects similar to an implementation project; however, upgrade projects can be significantly more efficient than implementation as we leverage UCF's previous implementation efforts and outputs. In addition, upgrades will be executed within the current change management system used by the UCF.

Within the upgrade project, several key areas of work begin with project definition and continue through the training of personnel on the new solution.

The following picture presents our approach to UCF's PeopleSoft FSCM Upgrade 9.x Process that we will follow at a high level.

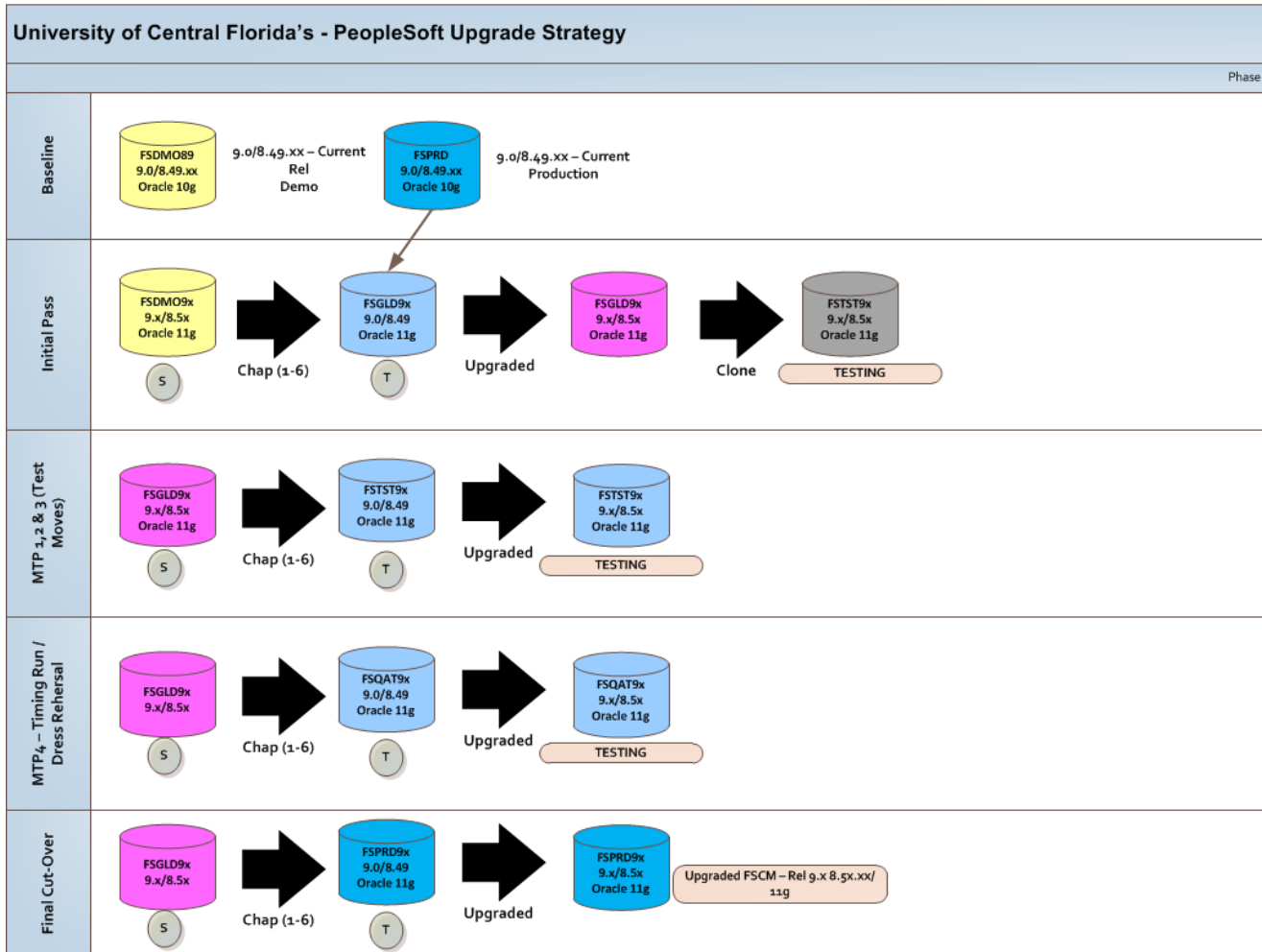


Figure 2: UCF's PeopleSoft FSCM Upgrade to 9.x (say 9.x)

The three (3) major phases that we follow for UCF's PeopleSoft Upgrade include:

1. The Initial Pass
2. The Move to Production Pass (identified as MTP 1, 2, & 3 Test Moves) and Move to Production Pass (identified as MTP4) at least once to perform Timing Run/Dress Rehearsal
3. The Final Cut-Over Move to Production Pass

The Initial Pass: The first pass is called the "Initial Pass", in this pass, we create a copy of UCF's production database, and then we install the new release demo database, delivered with the new PeopleSoft release. Once compare analysis is complete, the new release is incorporated into the Copy of Production to create the first "Upgraded Copy of Production". In the Initial Pass, the New Release Demo database is the source for all new release objects and system data, and the Copy of Production is the Target. The Upgrade Copy of Production is considered as a Gold Copy and will be utilized as a source for the entire subsequent Move to Production Passes and Final Pass.

Test Move to Production Pass: After completing the Initial Pass, we begin a series of "Test Move to Production Passes". In these passes, we create a new copy of your production database called the "New Copy of Production", using the Upgraded Copy of Production from the Initial Pass (Gold Copy) as the Source for all

new release objects and system data, then the new release is incorporated into the New Copy of Production to create a new “Upgraded Copy of Production”. In the Test Move to Production Passes, each iterative New Copy of Production is the Target.

We repeat the Test Move to Production Pass until we are comfortable and UCF is satisfied with the output of the functional business decisions and the pass runs smoothly against a current copy of UCF’s database. Iteratively, we create an updated new copy of production based on your most recent production data for each pass.

Test Move to Production Pass (Timing Run/Dress Rehearsal): Prior to the Final Pass we will conduct a Dress Rehearsal to capture the timings of the Move to Production in preparation for the Production Cut Over.

Final Move to Production Pass: When UCF is ready for the “Final Move to Production Pass”, we freeze the production database and the new release is incorporated into the production database itself. In this Final Move to Production Pass, the output of the Initial Pass (Gold Copy) is the Source and the production database is the Target.

1. Eliminating Orphan Objects

System Audit (SysAudit) and Database Audit Report (DDDAudit) are the starting point of the upgrade process. To generate DDDAudit report, there are over 10 queries to be executed in a sequential manner, while SysAudit query runs over 15 Integrity checks. Every Integrity check has over 10 queries to be executed in a specific order.

DDDAudit report provides us the inconsistencies that exist between PeopleTools record and index definitions and the database objects, while the SysAudit reports provide the orphaned PeopleSoft objects.

At the first level, our resolution processes for each of the problems identified in the report, in SysAudit and DDDAudit, per query adheres to the Oracle defined PeopleSoft Data Management resolution processes. Additionally, we will conduct an extensive analysis of these reports and adapt one of the following methods in providing a comprehensive solution to the problem.

2. Business Process Reengineering (BPR)

It is a joint effort between the UCF and the Development Team to build a BPR document. Although, it will rely on the guidance from product experts on the ADS Project Team to understand the processes that are available within the PeopleSoft Applications and how they work. With the term BPR, what we really mean is a subset known as Package-Enabled Process Redesign, rather than clean-sheet reengineering. Pure BPR implies starting fresh to create radical improvements to an organization’s processes, with fewer constraints. Package-Enabled Process Redesign, however, takes into account the delivered capabilities of the PeopleSoft suite applications. That is, Package-Enabled Process Redesign considers the business model (collection of best practices) that is built into each of the PeopleSoft Financial/Supply Chain Management Applications.

Typically, older versions of PeopleSoft systems contain features that were created in response to past situations that may no longer exist. Years of maintaining and adding accretions to legacy systems usually result in systems that incorporate complex processes. A Redesign simplifies many of those complex legacy processes by accepting and tailoring the PeopleSoft Application processes, with the assurance that hundreds of other organizations are also using those same processes successfully.

As shown in **Figure 3: BPR Workflow**, BPR begins with the foundation laid by the fit-gap analysis, which determines those requirements that cannot be met by the PeopleSoft Applications without customization or other complex changes. Because one of our principles is to minimize or avoid customization altogether, those requirements become candidates for BPR, in order to move to best practices embedded within the PeopleSoft Applications. We will redesign those processes with guidance from the SME experts. We will provide recommendations for new PeopleSoft suite processes that can replace the UCF’s as-is processes. BPR is not an abstract exercise. By combining BPR with the Conference Room Pilots, UCF personnel are able to try out the redesigned processes immediately and see exactly how those processes work within the applicable PeopleSoft

suite package and can decide upon that. ADS Upgrade team will configure and test the application to implement the new process and the UCF's Team will document the redesigned process as implemented.

3. Customization Reduction Plan

Continuous and uncontrolled software customization has the potential to increase risks, increase costs (both development and maintenance), and extend upgrade schedules. For UCF's success, we will minimize custom development and leverage out-of-the-box functionality throughout project life. Our PeopleSoft team has extensive configuration and personalization experience to avoid customizations with a successful track record of finding other alternatives.

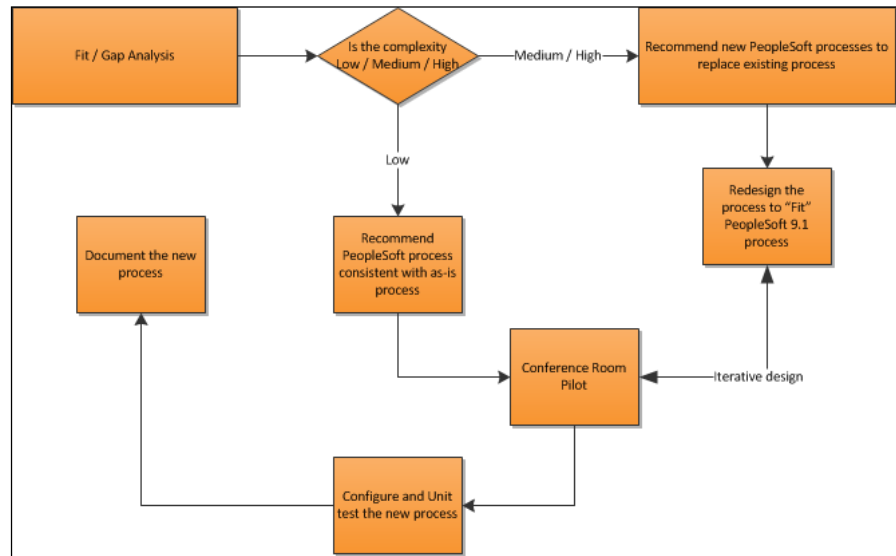


Figure 3: BPR Workflow

The complexity of software customization ranges from very simple to very complex depending on the functionality required. When assessing the complexity of a customization, we consider the availability of a skeleton / template to use as a model; number of functional components, business requirements, and processing rules impacted; number of transaction steps (lines of code) required, and amount of static versus dynamic processing required.

4. Updating Training Materials

We have extensive knowledge in developing training in PeopleSoft Upgrades and will develop and execute the Knowledge Transfer Plan to assist the UCF's Test Team in their preparation for testing and validating the upgrade. We will focus the delivery of training in the following areas: delta functionality between PeopleSoft 8.9 and 9.x and re-designed objects. Our approach is intended to provide a Quality Assurance review of End User Training development plan, as things that work for the Test team will definitely not work for the end users. The Knowledge Transfer is structured to ensure the Test Team is equipped with the proper knowledge and skills to effectively perform the testing activities. We strongly encourage the UCF to select Test Team members who will become the eventual Trainers for the End User Training. This ensures that the knowledge stays with the UCF, and reduces the cost of any future training requirements.

Our Job Impact analysis aims to provide the UCF with employees, job, job descriptions and other impacts that have been uncovered throughout the project, and validated prior to end user training. We provide a refined Impact Analysis after the end-user training and as part of the post go live documentation. Our experience shows the number and areas of impact diminishes as we progress towards go-live, but some impacted areas still exist, and as the Integrator we provide advisory services the UCF as part of our Change Management approach.

5. Post Upgrade Activities

Upon successful completion of the upgrade, we will perform several additional steps to ensure comprehensive completion upgrade.

1. **Secure Functional User Buy-In:** Functional validation of the system is a key task. We will use functional users to accomplish this objective. In the interest of the UCF, the functional users' complete testing and validating the process will have a greater impact in acceptance of newer processes.
2. **Testing Scope:** A comprehensive testing effort is one of the key steps to finishing the upgrade and going live on the new release. We conduct, a full, integrated test that includes user acceptance and performance

testing, and exercise all the business processes that organization will use. We encourage UCF users to choose to use automated testing tools; in most cases, this automated approach should be augmented with human testing as well.

- 3. Deciding to Go Live:** Once the PeopleSoft is tested thoroughly in the MTP4 stage, we will perform a sanity check to ensure all the loose ends are coupled and receive concurrence from the UCF's stakeholders. Ultimately, the decision to start running the business on the new solution must be made internally. We will provide sufficient time to UCF to perform User Acceptance Testing to make sure that the UCF team has enough information to enable a defensible **Go** or **No-Go** decision to be made. The go live checklist created earlier in the upgrade process will be leveraged to verify that the success criteria have been achieved during the project. We make sure that all affected groups from both business and IT are represented in this decision.

6. Train End Users

While many of UCF's teams existing skills will serve you well in your upgrade project, it is extremely important that we provide training on the new features, business processes, and other changes that will help your staff become more efficient and effective with the new version.

- 1. Train End Users on the New Solution:** We encourage and ensure your end users must be trained from the ground up to use the new application solution. However, during UCF upgrade project, you will likely have experienced users who are already familiar with the basics. This fact can both assist and impede your upgrade project effort. Your end users, most importantly those who will be testing the system, must have good information about how the resulting solution will be different, whether the changes are functional, user interface, or technical in nature. These considerations will prevent issues from being reported that are the result of misunderstandings, and better position overall acceptance of the new solution. We also provide applicable trainings, such as the PeopleSoft Enterprise User Productivity Kit (UPK).
- 2. Get Specific Technical Training:** We ensure the UCF's project team and support team must be proficient in the new technologies introduced in the latest release. Team members must also understand the new architecture and performance best practices. We perform an assessment to reconcile the skills needed to support the development and maintenance of the new release. This consideration is especially critical for a successful upgrade initiative.
- 3. Optimize Training Processes:** One of the best ways to reduce the number of issues you have to track, research, and resolve is to train your users at an optimal time in the upgrade process. Although many of the core functional and administrative business processes are similar between releases, our training will give your users the information they need to distinguish true issues from intended changes. For this reason, the timing of this functional training is important. While you may want key users to be trained early on to give input to the project and assess impact, most users prefer training closer to going live on the new system so they don't have to remember what they have learned over a long period of time without being able to apply this knowledge.

7. Training Activities

Our Knowledge Transfer Plan will define the methods and tools used to develop and deliver training to the UCF end users. The approach to End User Training development is to ensure end users are equipped with the proper knowledge and skills to perform daily tasks based on their unique job roles effectively. The Training Program is designed to first transfer "big picture" knowledge of how the overall process is carried out, focusing on specific changes from the "as-is" to the "to-be" business and incorporating the UCF business objectives. We will leverage User Productivity Kit (UPK) for the development and updating of training materials and artifacts, such as user guides, instructor materials, eLearning applications, On-Line Help, and job aids. We will then provide the prescribed training courses. In addition, we will present the UCF with a train the trainer program so you are able to fully train your end users.

The primary objectives of the training program are to:

- Provide the UCF employees with a level of training and education to perform their jobs efficiently after the upgrades to PeopleSoft modules have been rolled out
- Minimize the impact on operations to mitigate potential negative impact on the business.
- Provide support to end users before, during, and after the upgrade.
- Provide users an understanding of how their jobs will be carried out with the changes to the system.
- Prepare users with the required skills to work competently and confidently in their job role.
- Provide skill in using the documentation and job aids as well as on-the-job support.
- Maximize the transfer of knowledge from the trainers to users.
- Provide training that is meaningful to the participant and least disruptive to normal business routines.
- Provide an opportunity to work in a “practice” environment.

8. Verification of Integration Points

In the past we have integrated PeopleSoft with other ERP based system, as well as a non-ERP based system. We have deployed staff based on the project schedule, by ramping-up the team accordingly. We will work with the UCF’s stakeholders and UCF’s IT Staff to ensure the integration points between PeopleSoft is complete, tested and verified. Our Upgrade Methodology is most comprehensive, as it will ensure all the integrations with Microsoft Office products that UCF may be currently maintaining. In addition, with our extensive testing and test strategy, we will ensure all finer points are captured and addressed.

C.2.4.2 Unified Methodology (OUM) for Development

ADS follows Oracle Unified Methodology (OUM) which provides a framework to create and implement PeopleSoft –based business solutions. Our OUM cuts across inception, elaboration, development, production and support phases of a Software Development Lifecycle.

The proposed Project team is balanced and is sufficiently equipped to steer the project initiative to the fruition. The steering committee will ensure administrative support and technical resources for the teams, such concerns as facilities, training, budget, and so forth. We understand that the UCF is assigning a Project Manager, who will be responsible for reporting progress and directing the project to a successful completion to the UCF’s stakeholders. We will support the Project Manager to apprise the stakeholders of the project progress by means of weekly meetings and project artifacts that gets distributed as per the Communication Management Plan. The project plan will have comprehensive information of team members, roles & responsibilities of the team members, backup plan, communication plan & structure, risks, project execution plan, configuration management, test strategy, milestones, defect measurements, defect prevention strategy, quality metrics & goals aligned to UCF.

At the minimum, we will support the Project Manager to communicate the following to the steering committee for the project initiatives:

S. No.	Project document	Periodicity
1.	Communication plan & structure	Defined at the start of the project and distributed. Updated if there is any change in communication plan and distributed thereon.
2.	Project Schedule	Updated daily, available online, distributed weekly
3.	Risk Assessment Status	Updated daily, available online, distributed weekly
4.	Project Progress Status	Updated daily, available online, distributed weekly
5.	Bug Report Status	Updated daily, available online, distributed weekly

ADS methodology is a process based one. We define the process as a connect series of action, activities, changes etc., performed by agents with the intent of satisfying the vision and mission of an Organization. Once processes are defined they need to be controlled. Our definition of process control is the process of planning and regulating, with the objective of performing a process in an effective and efficient way.

ADS Process based methodology, simplifies an ERP implementation in a repeatable and manageable fashion. This is accomplished by defining degrees of control over processes, and then using metrics to manage the control process. The output produced by a process has to conform to operation norms that are derived from business objectives.

1. Phases

This approach will be adapted to the customizations and development of new functionalities as envisioned by the UCF. Workflows within an OUM project are categorized into five phases: Inception, Elaboration, Construction, Transition, and Production. These phases are described below:

Inception – The overriding goal of the Inception phase is to reach concurrence among all stakeholders on the lifecycle objectives for the project. The Inception phase is critical for all projects as the scope of the effort, the high-level requirements, and the significant risks must be understood before the project can proceed. The Inception phase is used to kick off a project, review the strategic direction of the business, and confirm, document, and prioritize the high-level business requirements for the project. It is also the time to begin assembling and integrating the project team, to scope the entire engagement, and create the initial project plan.

Elaboration – The goal of the Elaboration phase is to create the detailed requirements, partition the recommended approaches and system processes, create any necessary prototypes, and baseline the architecture of the system. This effort results in a stable basis for the design and implementation effort in the Construction phase. The architecture evolves from the most significant requirements, those that have the greatest impact on the architecture of the system, and an assessment of risk. The stability of the architecture is evaluated through one or more architectural prototypes. During the Elaboration phase, the project team's understanding of the client's business requirements is verified to reduce development risk.

Construction – The goal of the Construction phase is to take the system processes from detailed requirements models, through configuration of standard packaged software functionality, development and testing of custom components, and integration to a system that is ready for a first release that goes into production. This first release is often called a beta release. In short, we complete the development of the application system, to validate that all components fit together, and prepare the system for the acceptance test and deployment. The application system is completed within a pre-defined number of iterations. Updates are made to each of the models (Use Case Model, Design Model, Architectural Implementation, etc.), as the requirements are progressively refined. When all of the planned iterations have been completed for each partition, the complete application system is tested. The tested system is the end work product of the phase.

Transition – The goal of the Transition phase is to install the system processes being implemented onto the production system, perform acceptance testing, and launch the live application. During this phase, the new system is accepted by the organization, the organization is made ready for the new system, and the system is put into production. If the new system replaces an old one, a smooth cutover to the new application is provided. The Transition phase can span several iterations and includes testing the system in preparation for release and making minor adjustments based on user feedback.

Production – The goal of the Production phase is to operate the newly developed system, assess the success of the system, and support the users. This includes: monitoring the system; acting appropriately to validate continued operation; measuring system performance; operating and maintaining supporting systems; responding to help requests, error reports and feature requests by users; and managing the applicable change control process so that defects and new features are prioritized and assigned to future releases.

PROCESSES

All OUM tasks are also organized into *processes* that group related tasks together. Project team members are assigned to these groupings according to their specialization and background. OUM's Implement Focus Area includes the following processes:

BUSINESS REQUIREMENTS

Requirements Analysis	Testing	Documentation
Analysis	Performance Management	Organizational Change Management
Design	Technical Architecture	Training
Implementation	Data Acquisition and Conversion	Transition & Operations and Support

Figure 4: Implementation Focus across Phases illustrates how the processes are executed across the five phases of the Implementation Focus Area:

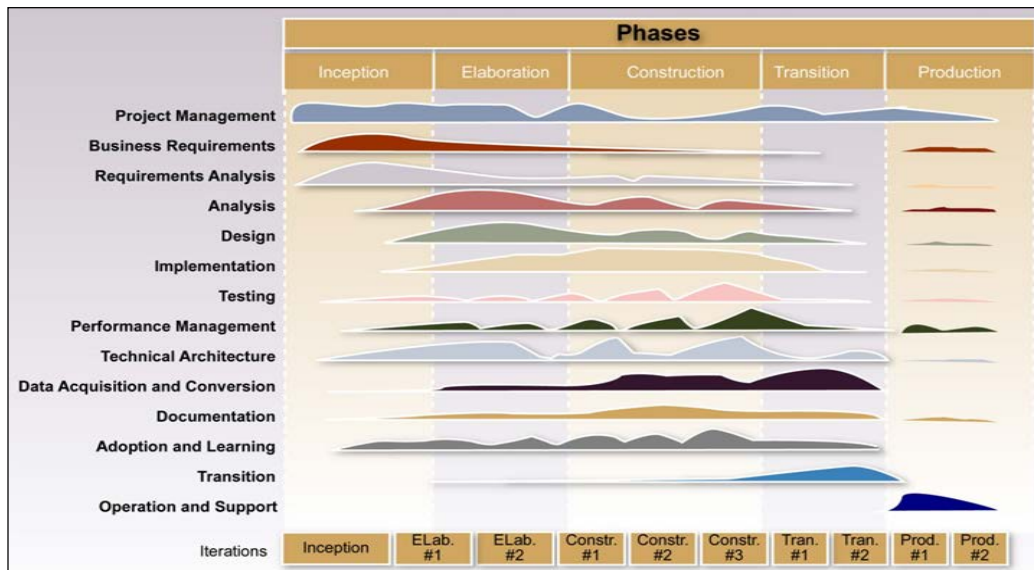


Figure 4: Implementation Focus across Phases

The diagram above illustrates a typical OUM project, with a typical number of iterations. The relative amount of effort performed in each process, per iteration, is represented by the height of the colored bars for each process. The number of iterations performed and the amount of effort required for a particular project will vary depending upon a number of factors including: scope, technical and programmatic risk, system size, and team size.

The ADS Process Approach: ADS approach of collecting the best practice information, via project documentation and interviews, and validation meetings.

2. ADS Process Based Methodology Defined

The model shown in the **Figure 5: ADS Process Based Methodology** is a generic process model. Our processes are always organized around a goal, and the main output of that process is the result of the goal. As shown, the data entering the process is processed, and the processed data is measured and reviewed.

This approach underpins the Plan-Do-Check-Act (PDCA) of any Quality Management System (QMS), and provides a clear definition of the purpose of the process. With such clarity, our methodology allows us to verify and validate the process action for a successful achievement and provide recommendation for the improvement. The output produced by a process has to conform to operation norm that are derived from the business objectives. When a PeopleSoft module is implemented, if it conforms to the set norm i.e. Industry best practices, may be considered effective. If the activities are also carried out with a minimum effort, the process can also be considered efficient. We will be applying this ADS methodology aligned with ADS Unified Method, adhering to UCF's System Development Life Cycle (SDLC) methodology and UCF's Information Technology Security Policy and Standards.

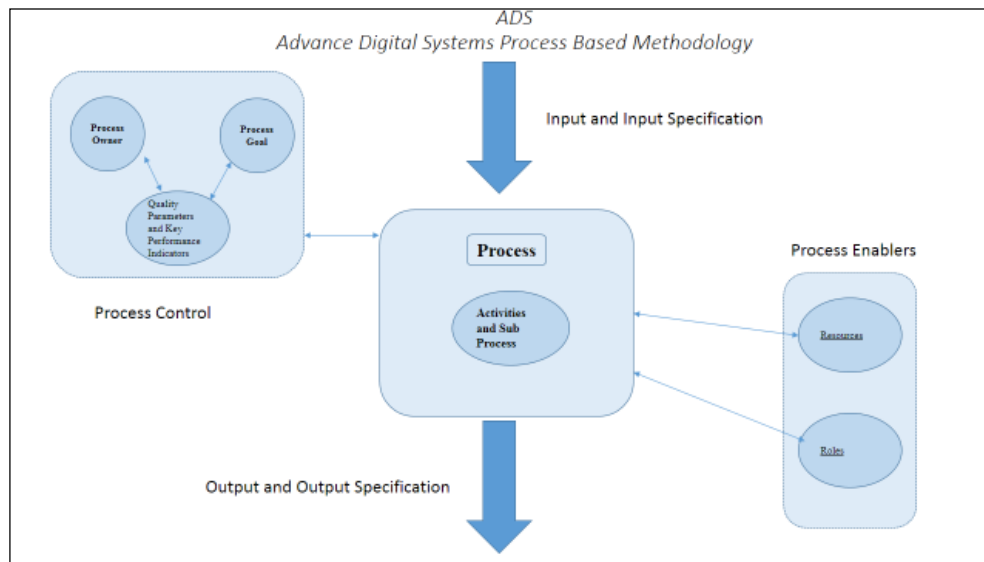


Figure 5: ADS Process Based Methodology

3. Deliverables at Several Phases or Sub-phases

Following are relevant deliverables at various phases of the Life Cycle at UCF. These may be in the form of multiple documents or multiple sections in a single document. Our project team will support the Project Manager in providing a comprehensive list of deliverables based on a detailed assessment at UCF, at the start of the project, and refines them as the project progresses.

Phase	Deliverable	Description
Project planning, after Fit / Gap Analysis	Work Breakdown Structure	(WBS) defines a project's tasks, processes, responsible parties, etc. Establishing the WBS is the first step in defining the project and in establishing the baseline.
	Project Schedule	This documents the integration of activities, durations and resources.
	Project Plan	This document the project's scope, tasks, schedule, allocated resources, and interrelationships with other projects
	Quality Assurance Plan	The purpose of the Quality Assurance (QA) Plan is to ensure that this system satisfies contractual agreements, meets or exceeds quality standards, and complies with approved systems development life cycle (SDLC) processes.
	Change Management Plan	Defines the strategies to improve user acceptance by leveraging the communication plan and stakeholder assessment. The plan defines intervals in the project where key activities need to be conducted and review the results to determine the pulse of the user community. The plan also defines appropriate corrective action where change is not being readily accepted.
	Communications Management Plan	This document defines the distribution structure that defines to whom project information will flow, in what format, in what manner (written reports, meetings, emails, etc.) and at what frequency (weekly, monthly, etc.). It may also describe methods for accessing information between scheduled communications and other communication mediums, such as newsletters.
	Risk Management Plan	This document will identify, analyze, and mitigate the potential risks to the project. It contains Risk Assessment Report, Results from qualitative and quantitative risk analysis processes, Risk responses strategies, such as avoidance, mitigation, transference and acceptance and Contingency plans

Requirement Analysis	Functional - Requirements Traceability Matrix	This document provides a bi-directional traceability of Functionality from Requirements through Testing.
	Technical – Requirements Traceability Matrix	This document provides a bi-directional traceability of Technical details from Requirements through Testing
Design Phase	Migration Analysis	This documents the object numbers, types and sequencing of steps in porting over. The document also tracks version control of the objects
	Fit Gap Report	The Fit/Gap report provides a list of all requirements that are factually know not to change between versions as well as those that do not meet current and future version. The report outlines what alternatives can be used to eliminate the Gaps
	Customization Reduction Roadmap	Based on the 9.x version, the functional and technical teams detail which customization have a high, medium versus low probability of being eliminated. Data supports the rankings and solution criteria for elimination of reduction in complexity through enhancements

C.2.5 Timely Completion

In this section, we provide our best practices in the form of a checklist acquired from our past experience in similar PeopleSoft engagements from PeopleSoft version 8.4 through PeopleSoft 9.2. We are confident that adhering to these best practices will ensure the project / implementations taken up at UCF will be completed within budget and within time. The best practices described below are from perspective of various resources working in a project.

PROJECT MANAGEMENT

- ☞ To aim for an early planning, collaborative approach, customizations
- ☞ To build a strong project management foundation on the basis of accountability
- ☞ To adhere to timeline, scope, tasks, resource management
- ☞ To involve and depend on the end-users in all phases of implementation / upgrades, especially during system test and UAT, as they know processes best and were able to easily identify issues
- ☞ To build a team of extremely knowledgeable and talented technical developers troubleshooting, issue resolution, development, migration

FUNCTIONAL CONSULTING

- ☞ **To set-up a system as vanilla and as simple as possible**
- ☞ To have defaults set up to maximize the benefit and reduce the amount of repetitious or redundant data entered
- ☞ To conduct a review and assessment all PeopleSoft Functional tables
- ☞ To inactivate any codes that is no longer needed and perform data cleanup to remove any demo data in the tables
- ☞ To develop a business process procedure to ensure that tables are updated appropriately and timely to preserve data integrity within the system
- ☞ To conduct a thorough review and assessment on using multiple Business units or SetIDs
- ☞ To extent possible use same codes for SetIDs, Business Unit IDs, Department IDs across databases

TECHNICAL CONSULTING

- ☞ To perform a full Dress Rehearsal of the Go-Live activity
- ☞ To mitigate the interference to functional testing to the maximum possible extent
- ☞ To perform an End-to-End Cross Functional Testing
- ☞ To aim for an early planning, collaborative approach, customizations
- ☞ To build a strong project management foundation on the basis of accountability
- ☞ To adhere to timeline, scope, tasks, resource management

- ☞ To ensure DBA's have sufficient practice sessions before the final move to production

DATA CONVERSION

- ☞ To allow enough time to migrate queries between PeopleSoft Application versions
- ☞ To weigh the pros and cons of applying conversion, keeping in mind that just reapplying modifications may take less time than doing it again
- ☞ To retest the core functionality, after conversion, before making new modifications. This is to ensure that the conversion errors are flushed out, and to ensure we identify any PeopleSoft bugs.
- ☞ To use extensive user involvement after conversion trials to ensure data is converted as required
- ☞ To consider reapplying modifications to PeopleSoft Panels (Pages) rather than bringing customizations forward through upgrade process.
- ☞ To review all set-up tables after the initial conversion for errors or missing information
- ☞ To have a thorough understanding of the current items in hand to ensure that scheduling of Query migration are to get the query trees in order
- ☞ To be knowledgeable about the new security views

SYSTEM ARCHITECTURE

- ☞ To review each PeopleSoft modules first, retrofitting it is painful
- ☞ PeopleSoft Security Conversion, and conduct a workshop for better understanding among the user community
- ☞ To focus on reducing customization, to a greater extent, to keep as close to vanilla to support futures patches
- ☞ To provide enough time for the review and retrofitting, for a fair, proper representation at the review
- ☞ Configuring security needs a high degree of effort, just not to be surprised by the effort needed
- ☞ To start and include Security SME's from the very early stage in the project
- ☞ To perform a smoke test ahead in time and to do it often
- ☞ To run PeopleSoft Security Update utility to ensure security upgrades happen
- ☞ To provide an environment for a cross-functional security discussion involving people from various functions and departments, Security to them may be a different paradigm
- ☞ To perform an end-to-end security testing

UPK DEVELOPMENT

- ☞ To use UPK Professionals early in the project design and fit/gap analysis stages, as project teams can improve communication, enforce participation, and validate transaction flows
- ☞ As UPK content is single source it is a feature as well as a drawback, hence plan the content upfront and utilize links & references with utmost care.
- ☞ UPK contents are collaborative in nature, hence several people can work simultaneously, can build and review work faster and knowledge sharing across the enterprise is seamless
- ☞ Reduces the time taken for UAT as user community and testing team can work together by creating and deploying test plans and real-time through a test plan and facilitate the tasks of documenting any issues

C.3 ADS Billing Rates

ADS respectfully provides the following pricing structure for UCF's ERP Consulting Services for the various labor categories, who will be involved in the activities. The proposed Billing Rates is valid for 120 days from the Response Date of this ITN and provides rate for Onsite and Remote activities.

Labor Category	Fully Burdened Hourly Rate (Onsite)	Fully Burdened Hourly Rate (Remote)
1. PeopleSoft Project Manager	\$ 160.00	\$ 124.80
2. PeopleSoft Technical Consultant	\$ 145.00	\$ 113.10
3. PeopleSoft FSCM Functional Consultant	\$ 155.00	\$ 120.90
4. PeopleSoft HCM Functional Consultant	\$ 155.00	\$ 120.90
5. PeopleSoft System Administrator	\$ 129.00	\$ 100.62
6. PeopleSoft Campus Solution Consultant	\$ 154.00	\$ 120.12
7. Database Administrator	\$ 110.00	\$ 85.80
8. PeopleSoft Trainer & UPK Developer	\$ 135.00	\$ 105.30
9. PeopleSoft Security Specialist	\$ 139.00	\$ 108.42

Ash Kapur Ash Kapur
Authorized Individual Name And Signature

ADVANCE DIGITAL SYSTEMS INC
Company Name

Senior Vice President
Title

IEN 20-1405737
Company Tax ID #

C.4 ADS Detailed Explanation of the Costs to UCF

The fully burdened hourly rate provided in the section C.3 above, is all-inclusive hourly bill rates. At no point-in-time, UCF will be charged any additional fees for travel, boarding or lodging expenses.

D. ADS Experience With Large, Complex, Multi-Campus Higher Education Institutions:

ADS is proposing and offering services in all the three areas including, **Systems Administration, Database Administration and PeopleSoft application and tools functions as per the ITN section 1.1.** In view of this, ADS's experience described below, addresses the System Architecture and its related third-party integration services.

D.1 Systems Administration & Database Administration Functionalities

Table below provides our Systems Administration/Architecture Experience while working at Virginia Commonwealth University (VCU).

(a) Project Scope
VCU intended to perform PeopleSoft HCM Upgrade to 9.1 utilizing VCU's Virtual Environments. VCU intended to upgrade PeopleSoft HCM from v8.9 to v9.1 including the following HCM Suite Applications. Human Resources, Base Benefits, Benefits Administration, eBenefits, North American Payroll, Recruiting (Talent Acquisition Management / Candidate Gateway). Upgrade PeopleSoft ELM from v9.0 to v9.1 and Upgrade PeopleTools from v8.49 to v8.52.
(b) System Architecture devised by ADS
<p><u>Virginia Commonwealth University HCM 9.1 & PeopleTools 8.52.06 Upgrade Methodology</u></p> <ul style="list-style-type: none"> • Prepare HRDMO91 environment <ul style="list-style-type: none"> ✓ Download CD's from eDelivery site ✓ Install PeopleTools 8.52.06 (create new PS_HOME) ✓ Create HRDMO91 database (Source) • Prepare HRDMO91 & HRSRC (Copy of Production) environment for Initial Pass <ul style="list-style-type: none"> ✓ Prepare HRSRC environment for Initial Pass ✓ Install Change Assistant ✓ Restore copy of HRPRD to HRSRC ✓ Configure HRSRC (Current PeopleTools 8.52.06 environment) • Perform Initial Pass Tasks (HRDMO91 -> HRSRC) <ul style="list-style-type: none"> ✓ Prepare upgraded environment (HRDEV91) ✓ Apply Maintenance Pack x to HRTST91 ✓ Team Testing - HRTST91 (Initial Pass Environment) • Prepare HRUPG environment for 1st MTP <ul style="list-style-type: none"> ✓ Restore copy of HRPRD to HRUPG ✓ Perform MTP1 Tasks (HRSRC -> HRUPG) ✓ Apply Maintenance Pack x to HRUPG ✓ Team Testing - HRUPG91 (MTP1 Environment) • Prepare HRUPG2 environment for 2nd MTP <ul style="list-style-type: none"> ✓ Restore copy of HRPRD to HRUPG2 ✓ Perform MTP2 Tasks (HRSRC -> HRUPG2) ✓ Apply Maintenance Pack x to HRUPG2 ✓ Team Testing – HRUPG2 • Prepare HRUPG3 environment for 2nd MTP <ul style="list-style-type: none"> ✓ Restore copy of HRPRD to HRUPG3 ✓ Perform MTP2 Tasks (HRSRC -> HRUPG3) ✓ Apply Maintenance Pack x to HRUPG3

✓ Team Testing – HRUPG3

- Prepare HRPRD91 environment for Final Pass
- Perform Final Pass Tasks (HRSRC -> HRPRD91)
- Apply Maintenance Pack x to HRPRD91
- Go Live

Infrastructure Design

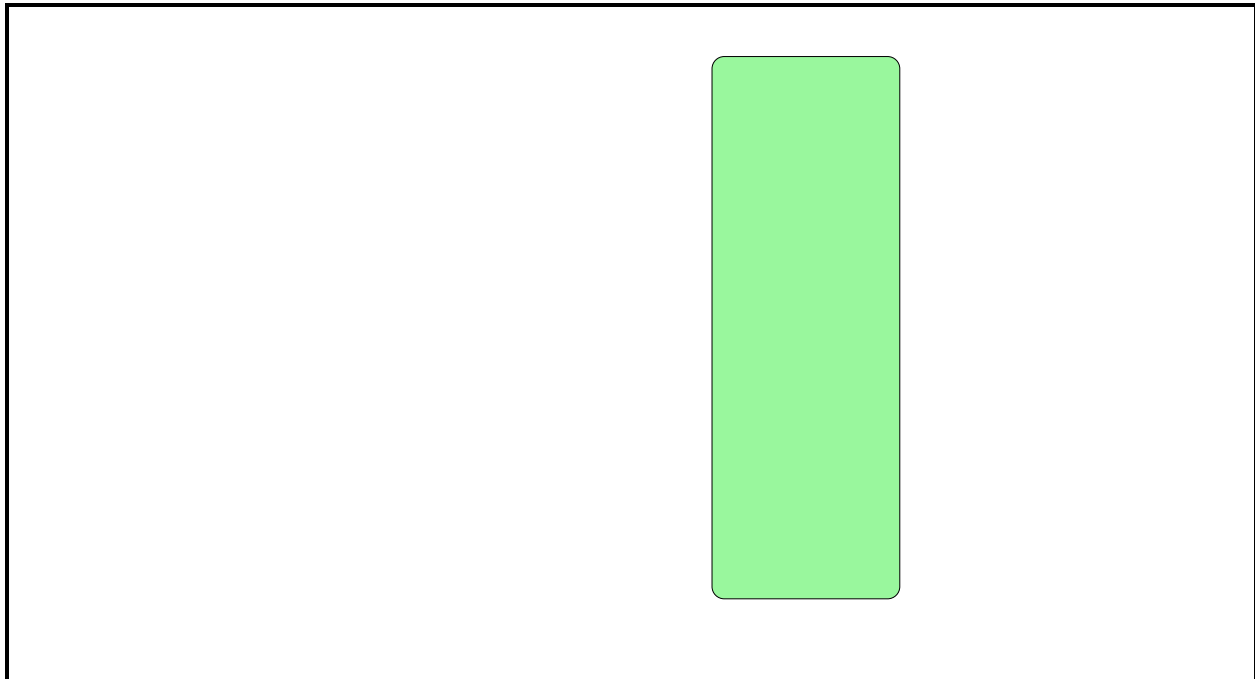
HCM 9.1 will be a centrally hosted environment with both QAT and Production in Richmond, VA. The environment consists of two virtual machines on HP ProLiant BL 460c G7, which function as web servers and application servers. In addition, a virtual machine on HP ProLiant BL 460c G6 will be utilized for the database server and batch/reporting server. At the logical level, the QAT environment will be identical to the Production environment. A high level overview of the system architecture is shown below.

☞ **Physical Design**

The Physical Views of the Virginia Commonwealth University implementation of HCM 9.1 are shown below. This section depicts the Development, QAT and Production architecture.

☞ **QAT/PRD Physical Design**

The following architecture diagram designed by ADS, depicts the Virginia Commonwealth University's physical implementation for HCM 9.1. The QAT/PRD environments will be housed in the Richmond, VA Data Center. The application will be deployed on shared infrastructure with virtualized servers.



☞ **Hardware Components**

HCM database servers are virtualized on HP ProLiant BL 460c G6 physical server. The server has multiple virtual machines for development, QAT and Production environments. HCM web servers and application servers are virtual machines running on shared HP ProLiant BL 460c G7 physical server.

The sections below indicate the CPU/memory that is allocated for each virtual server. The actual physical servers have more memory and CPUs than shown in the description for the virtual machines but the additional capacity may be allocated to other virtual servers on the physical server.

☞ **Web and Application Servers**

HCM web and application servers are virtual machines running on HP ProLiant BL 460c G7 physical server. Other virtual servers for other environments will also be hosted on the same physical servers. Each virtual

server was configured with 4 CPUs with 16 GB RAM. Each virtual server will host one PeopleSoft Web Server and Application Servers domains named HRQAT/HRPRD on each virtual server for a total of two-web server and application server domains. The domains was as “large” PeopleSoft Application Server domains with some overrides to the default “large” configuration.

☛ **Database Servers**

HCM database servers are virtualized on shared HP ProLiant BL 460c G6 physical server (4 CPU/16GB ea.), Windows 2008, SQL Server 2005, internal HDD 2x256GB. These VMs will host the PeopleSoft HCM database environment.

☛ **Windows Batch/Reporting Servers**

All batch activity for HCM will be executed on the Windows Batch / Reporting Servers. HCM Windows Batch / Reporting server is a virtual machine running on a shared HP ProLiant BL 460c G6 physical server. Other virtual servers for other environments will also be hosted on the same physical server.

The virtual server will host two Windows instance of the PeopleSoft Process Scheduler. These instances will be named PSNT and PSNT2. Scheduling on this server will be controlled by the PSNT2 master scheduler.

☛ **Network**

HCM communicates both internally and externally via the Virginia Commonwealth University network, utilizing HTTPS and socket-based communications over TCP/IP. Specific network hardware components are described below.

☛ **Load Balancers**

Hardware load balancing will be implemented in the HCM 9.1 architecture via a shared pair of F5 Big-IP or Cisco Load Balancers for the intranet/internet. Each load balancer pair is configured in a master/slave mode to provide failover capability at the load balancer level. The load balancing functions for the HCM 9.1 intranet/internet components were configured as follows:

Web Servers – User will access PeopleSoft web servers via a VIP (pshrqat.sm.com or pshr.sm.com) and port 443 on the load balancer. Users will access HCM content via another VIP with port 9202. For additional details on the specific load balancing IP addresses and ports, refer to the physical architecture diagram.

Application Servers – The web servers will access the application servers via a VIP and port 9200 on the configuration file. For additional details on the specific load balancing IP addresses and ports, refer to the physical architecture diagram.

D.2 Systems Administration, Database Administration & Application Functions

Table below provides our Systems Administration/Architecture Experience while working at Strayer University.

(a) Project Scope

Strayer University intended to integrate Time Management System (Kronos) to the existing HCM’s Time & Labor module.

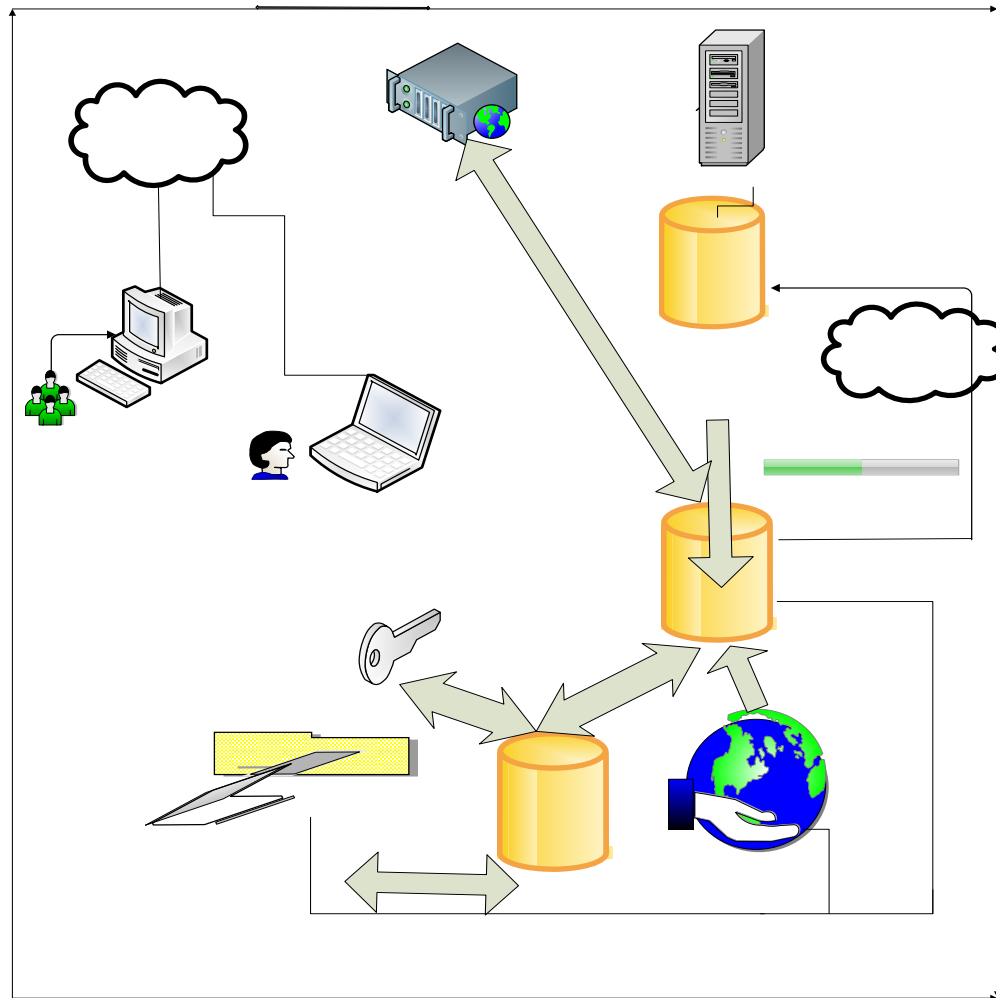
(b) Third-party Integration services - Kronos

Implementing & integrating Kronos, the Time Management System (TMS), was done in multiple steps. In the initial step, we conducted an exhaustive requirements gathering by interacting with the HR Department and identifying the underlying process. In the second step, we defined a process aligning to the current system, and changed a few of the existing process to suit the TMS automation. We implemented the Kronos, and trained the HR team and end-users in using the system, as it was integrated to the swipe card. The last

step was integrating the time entry to the Payroll module using Integration Broker services as described below.

Our approach used SQR programs and Integration Broker services to synchronize the data between Time Tracker and PeopleSoft Payroll system. Time & Labor module is a single repository that provides organizations with variety of performance indicators based on real-time data. Using Integration Broker services (SOA based), we first synchronized the data between Time Tracker and Time & Labor modules using SQR and AE programs, and further published the data to the payroll, benefits, financial and cost accounting modules, and host of other modules dependent on this data for fulfilling the reporting needs.

Following image provides an overview of the interaction between various systems involved in the integration.



D.3 PeopleSoft Application & Tools Functions

Table below provides our Systems Administration/Architecture Experience while working at US House of Representatives.

(a) Project Scope

Since October 2010, the U.S. House of Representatives (House) has been using PeopleSoft Financials as its production financials application. The House utilized version PeopleSoft Financials 8.9 with PeopleTools 8.49 with General Ledger, Commitment Control, Purchasing, Accounts Payable, Accounts

Receivable/Billing, and Asset Management. House intended to integrate single sign-on functionality between PeopleSoft Financials and Oracle's identity management, WebCenter content management, and scanning tools. Individual components include: Oracle Virtual Directory (OVD), Oracle Identity and Access Management (OAM), Oracle Identity Management (IDM), WebCenter Imaging, WebCenter Content, Oracle Forms Recognition (OFR), WebCenter Document Capture (ODC), and the Oracle SOA Suite.

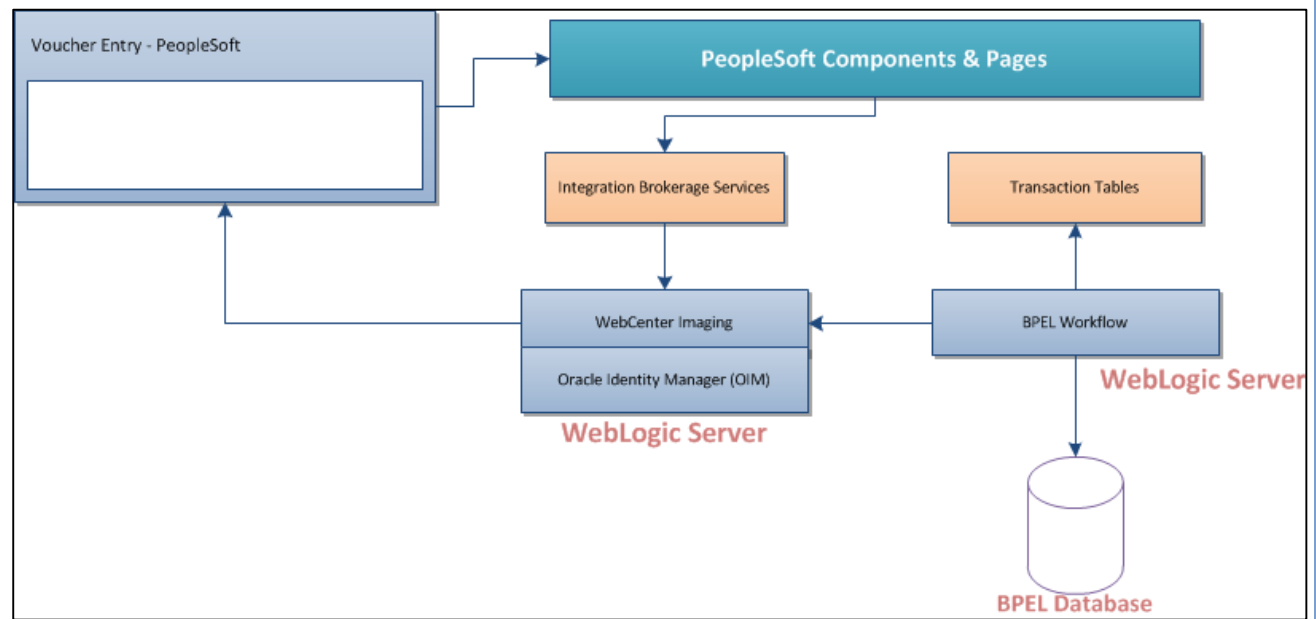
(b) Integration Services

Solution: ADS performed the following activities at the US House:

1. Supported the US House's Oracle SOA Suite, WebCenter Imaging, and WebCenter Content applications and their integration with the PeopleSoft Financials and Oracle Identity Management applications, as well as their continued design, development, and testing;
2. We reviewed the current setup and configuration of the Oracle SOA Suite, WebCenter Imaging, and WebCenter Content tools and their integration with the PeopleSoft and Identity Management applications, provide analyses, troubleshoot issues, and recommend and execute improvements;
3. We supported the integration activities, integrating the Oracle SOA Suite, WebCenter Imaging, and WebCenter Content solution with the upgrade to PeopleSoft Financials 8.9 and PeopleTools 8.49

Tools used: Oracle SOA Suite, WebCenter Imaging, WebCenter Content, WebLogic, Oracle Virtual Directory (OVD), Oracle Identity and Access Management (OAM), Oracle Identity Management (IDM), Oracle Forms Recognition (OFR), WebCenter Document Capture (ODC), PeopleSoft Financials 8.9 and tools 8.49.

Following image provides an overview of the interaction between various systems involved in the integration.



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E. Details of ADS Ability To Meet Requested Project Time Lines:

Following is the partial list of current or recent similar-type projects as described in section 1.1 that we are successfully executing, demonstrates ADS' ability to engage adequate resources and successfully meet set timelines and deliverable within budget.

1. Virginia Commonwealth University, Richmond, VA
2. US House of Representatives, Washington, DC
3. Pension Board Guaranty Corporation, Washington, DC
4. George Washington University, Washington, DC
5. Boise State University, Boise, ID
6. James Madison University, Harrisonburg, VA
7. Washington Metropolitan Area Transit Authority, Washington, DC
8. Metropolitan Washington Airports Authority, Washington, DC

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ITN Other Requirements:

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: 1325JC SA
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 IEN 20-1405737		
VENDOR NAME Advance Digital Systems		REASON FOR NO OFFER
VENDOR MAILING ADDRESS 10560 Main Street, Suite 214		
CITY - STATE - ZIP CODE Fairfax - VA -22030		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 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.
AREA CODE 703	TELEPHONE NO. 383-0808	
	TOLL FREE NO.	
703	FAX NO. 935-4855	

Government Classifications Check all applicable

- | | |
|--|--|
| <input type="checkbox"/> African American | <input type="checkbox"/> American Women |
| <input checked="" type="checkbox"/> Asian-Hawaiian | <input type="checkbox"/> Government Agency |
| <input type="checkbox"/> Hispanic | <input checked="" type="checkbox"/> MBE Federal |
| <input type="checkbox"/> Native American | <input type="checkbox"/> Non-Minority |
| <input type="checkbox"/> Non-Profit Organization | <input type="checkbox"/> Pride |
| <input type="checkbox"/> Small Business Federal | <input checked="" type="checkbox"/> Small Business State |

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

I certify that this offer is made without prior understanding, agreement, or connection with any corporation, firm or person submitting an offer for the same materials, supplies, or equipment and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this offer and certify that I am authorized to sign this offer for the vendor and that the vendor is in compliance with all requirements of the Invitation To Negotiate, including but not limited to, certification requirements. In submitting an offer to an agency for the State of Florida, the vendor offers and agrees that if the offer is accepted, the vendor will convey, sell, assign or transfer to the State of Florida all rights, title and interest in and to all causes of action it may now or hereafter acquire under the Anti-trust laws of the United States and the State of Florida for price fixing relating to the particular commodities or services purchased or acquired by the state of Florida. At the State's discretion, such assignment shall be made and become effective at the time the purchasing agency tenders final payment to the vendor.

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

AUTHORIZED SIGNATURE (MANUAL)

Ash Kapur - Senior Vice President
AUTHORIZED SIGNATURE (TYPED), TITLE

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

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.

Acknowledgement Of Addendums



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

Advance Digital Systems

COMPANY NAME

June 3rd, 2014

DATE

Ash Kapur

PRINT OR TYPE PROPOSER'S NAME

akapur@advancedigitalsys.com

EMAIL ADDRESS

12479 Research Parkway • Orlando, FL 32826-3248 • (407) 823-2661 • FAX (407) 823-5551
Orlando Tech Center

An Equal Opportunity and Affirmative Action Institution

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 inquiries, 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.

<u>SECTION</u>	<u>YES</u>	<u>NO</u>	<u>RESPONDENT INITIALS</u>
2.1 **Non-negotiable**	<u>Yes</u>	_____	_____
2.2 **Non-negotiable**	<u>Yes</u>	_____	_____
2.3 **Non-negotiable**	<u>Yes</u>	_____	_____
2.4	_____	_____	_____
2.5	<u>Yes</u>	_____	_____
2.6 **Non-negotiable**	<u>Yes</u>	_____	_____
2.7 Section Not Used			
2.8 **Non-negotiable**	<u>Yes</u>	_____	_____
2.9	<u>Yes</u>	_____	_____
2.10	<u>Yes</u>	_____	_____
2.11 **Non-negotiable**	<u>Yes</u>	_____	_____
2.12	<u>Yes</u>	_____	_____
2.13**Non-negotiable**	<u>Yes</u>	_____	_____
2.14**Non-negotiable**	<u>Yes</u>	_____	_____
2.15	<u>Yes</u>	_____	_____

2.16	<u>Yes</u>	_____	_____
2.17	<u>Yes</u>	_____	_____
2.18 **Non-negotiable**	<u>Yes</u>	_____	_____
2.19	<u>Yes</u>	_____	_____
2.20 **Non-negotiable**	<u>Yes</u>	_____	_____
2.21	<u>Yes</u>	_____	_____
2.22	<u>Yes</u>	_____	_____
2.23	<u>Yes</u>	_____	_____
2.24	<u>Yes</u>	_____	_____
2.25	<u>Yes</u>	_____	_____
2.26	<u>Yes</u>	_____	_____
2.27**Non-negotiable**	<u>Yes</u>	_____	_____
2.28	<u>Yes</u>	_____	_____
2.29	<u>Yes</u>	_____	_____
2.30**Non-negotiable**	<u>Yes</u>	_____	_____
2.31**Non-negotiable**	<u>Yes</u>	_____	_____
2.32	<u>Yes</u>	_____	_____
2.33	<u>Yes</u>	_____	_____
2.34	<u>Yes</u>	_____	_____
2.35**Non-negotiable**	<u>Yes</u>	_____	_____
2.36	<u>Yes</u>	_____	_____
2.37	<u>Yes</u>	_____	_____
2.38	<u>Yes</u>	_____	_____

2.39**Non-negotiable**	<u>Yes</u>	_____	_____
2.40	<u>Yes</u>	_____	_____
2.41	<u>Yes</u>	_____	_____
2.42**Non-negotiable**	<u>Yes</u>	_____	_____
2.43	<u>Yes</u>	_____	_____
2.44	<u>Yes</u>	_____	_____
2.45	<u>Yes</u>	_____	_____
2.46	<u>Yes</u>	_____	_____
2.47	<u>Yes</u>	_____	_____
2.48	<u>Yes</u>	_____	_____
2.49 **Non-negotiable**	<u>Yes</u>	_____	_____
2.50	<u>Yes</u>	_____	_____
3.0	<u>Yes</u>	_____	_____
4.0	<u>Yes</u>	_____	_____

RESPONDENT COMPANY NAME ADVANCE DIGITAL SYSTEMS

AUTHORIZED SIGNATURE _____

TITLE SR. VICE PRESIDENT

DATE 06/03/2014

APPENDIX III

CERTIFICATE OF NON-SEGREGATED FACILITIES

We, Advance Digital Systems 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-contractor 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 4, 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 ADVANCE DIGITAL SYSTEMS

AUTHORIZED SIGNATURE _____

TITLE SR. VICE PRESIDENT

DATE 06/03/2014

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 is in 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: **ADVANCE DIGITAL SYSTEMS**

Authorized Representative's Name: ASH KAPUR

Authorized Representative's Signature: _____

Date: 06/03/2014

Appendix A - Resumes Of Proposed Staff for UCF Account:

Labor Category	Name Proposed Personnel
1. PeopleSoft Project Manager	Paul Hunt
2. PeopleSoft Technical Consultant	Mallik Akula
3. PeopleSoft FSCM Functional Consultant	Katherine Wyatt
4. PeopleSoft HCM Functional Consultant	Aeliegh Rothwell
5. PeopleSoft System Administrator	Nakul Sharma
6. PeopleSoft Campus Solution Consultant	William Reiss
7. Database Administrator	Hyun S. Kim
8. PeopleSoft Trainer & UPK Developer	Krystyna Joniak
9. PeopleSoft Security Specialist	Angela Williams

The following pages are the resumes of the proposed staff. We will provide a detailed resume upon the award of contract and/or at the time of any interviews.

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A.1 Paul Hunt – PeopleSoft Project Manager

SUMMARY:

Paul is a performance-driven, quality-conscious and analytical PeopleSoft Project Manager with over fifteen (15) years of experience in finance transformation efforts by delivering complex IT and business process improvement solutions to global corporations. **Extensive experience in managing full life-cycle PeopleSoft projects**, including business process design, financial application implementation/integration, and system strategy. Strong leadership and communication skills working with global teams in project-based environments.

Successfully managed PeopleSoft 9.1 Financial Upgrade project at The United States House of Representatives. Experience managing large, global PeopleSoft project teams. Experience working and integrating with other project teams such as Human Resources, Payroll, Purchasing, Reporting etc. Vast experience with project management activities such as creating, executing, and revising project work plans as required, monitoring progress and status, and providing status reports and communication as requested. Possess excellent communication, documentation and people management skills. Holds a Bachelor's Degree in Accounting and Economics.

- Extensive experience with PeopleSoft Financials 9.1
- Comprehensive knowledge and experience upgrading and maintaining PeopleSoft applications
- Comprehensive knowledge and experience managing PeopleSoft projects
- Knowledge and experience of applying and managing PeopleSoft Financial application patches
- Experience working with PeopleSoft General Ledger, Accounts Payable, Accounts Receivable, Billing, Asset Management, Commitment Control, Purchasing modules.
- Knowledge and experience managing PeopleSoft projects focused on application implementations, upgrades and maintenance.
- Ability to adapt to shifting priorities, demands and timelines through analytical and problem-solving capabilities
- Understanding of application programming, database and system design.
- Ability to react to project adjustments and alterations promptly and efficiently
- Ability to read communication styles of team members and contractors who come from a broad spectrum of disciplines.
- Ability to elicit cooperation from a wide variety of sources, including upper management and business units

PROFESSIONAL EXPERIENCE:

Advance Digital Systems, VA

October 2012 to Present

Client: The United States House of Representatives, Washington DC

Project Manager for The House's PeopleSoft 9.1 upgrade project including the following modules: General Ledger, Commitment Control, Purchasing, eProcurement, Accounts Payable, Asset Management, Accounts Receivable, and Billing. The project includes SDLC phases and standards including five upgrade phases (managed revenue: \$3.5 million).

ACE Philadelphia, PA

April 2009 to September 2012

Project Manager - Global Operations Project Manager

Successfully managed a global reengineering team consisting of 8 consultants and 10 client staff. The team conducts comprehensive reengineering projects within ACE's actuarial, financial and operational departments. Specifically responsible for cost benefit analysis, project plans, status reports, issue resolution, risk mitigation, steering committee presentations/facilitation, transition management, and completion of all project deliverables.

ACE Philadelphia, PA

March 2011 to Present

Subject Matter Expert - PeopleSoft Financials 9.1 Upgrade

In additional to my Global Operations responsibilities, I am also a subject management expert (SME) for ACE's 8.0 to 9.1 PeopleSoft financials upgrade. SME tasks include Asset Management and Expense modules functional expertise.

ACE Philadelphia, PA

January 2008 to March 2009

Project Manager - PeopleSoft Financials Global Implementation

Managed a global team consisting of 11 consultants (5 off-shore) and 34 client staff integrating a recently acquired life insurance company onto ACE's global PeopleSoft financials platform (managed revenue: \$2.1 million).

Wellington, Boston, MA

September 2006 to December 2007

Team Lead – PeopleSoft 8.9 Financials Global Implementation and Support –

Implemented PeopleSoft's Asset Management and Accounts Payable modules with integration points to Purchasing, eProcurement, Project Costing and the General Ledger.

Deloitte Consulting Boston, MA

January 2005 - September 2006

Manager

Project Manager – PeopleSoft 8.8 General Ledger

Goldman Sachs, New York, NY

October 2005 to September 2006

Led a team of 25 consultants and client staff that designed, built and deployed a PeopleSoft General Ledger solution for a large, global investment bank (managed revenue: \$6.2 million).

FedEx Memphis, TN

January 2005 to October 2005

Team Lead – Sarbanes Oxley System –

Implemented PeopleSoft's 8.8 Internal Controls Enforcer as part of a global corporate governance initiative.

IBM Business Consulting Services Cambridge, MA

October 2002 - December 2004

Manager/Team Lead – PeopleSoft 8.4 Accounts Payable, Purchasing and eProcurement Upgrade

Allmerica Financial, Worcester, MA

March 2004 to December 2005

Conducted a 7.5 to 8.4 upgrade of PeopleSoft's Accounts Payable, Purchasing and eProcurement modules with integration to Asset Management and the General Ledger.

Guardian New York, NY

September 2003 to March 2004

Team Lead – PeopleSoft 8.4 Accounts Payable and Asset Management

Implemented PeopleSoft's Accounts Payable and Asset Management modules with integration to the General Ledger.

GMAC Commercial Mortgage Philadelphia, PA

July 2003 to September 2003

Testing Lead – PeopleSoft 8.4 Financials Upgrade Testing

Led a team of four consultants who tested a 7.0 to 8.4 upgrade of PeopleSoft financials consisting of the General Ledger, Accounts Payable, Asset Management and Purchasing modules.

BC Hydro Vancouver, BC, Canada

November 2002 to July 2003

Team Lead – PeopleSoft 8.4 Asset Management

Led a PeopleSoft Asset Management team consisting of six members. Completed the project's Implementation Phase that included a rollout to ten business units

Price Waterhouse Coopers Boston, MA

July 2000 - October 2002

Principal Consultant

Team Lead - PeopleSoft 8.0 Asset Management and Travel & Expense

SAP Global System Test – Delta Airlines Atlanta, GA

October 2000 to May 2001

Testing Lead



Managed the integration test cycles that included fifteen global super-users and nine team members

EDUCATION AND CERTIFICATIONS:

Bachelor of Science, Accounting and Economics, Babson College - Wellesley, MA May 1993

TECHNICAL SKILLS:

Project Management	Building and maintaining program management and governance structures; Global team project management; PMP standards; Project charters; Risk and issue management; Executive management status reporting; P&L management; Project cost control; Cost/benefit analysis
PeopleSoft Consulting	PeopleSoft financials and procure-to-pay modules; Requirement gathering; Fit/Gap analysis; Functional specifications; Configuration; Conversion specification; Interface design; Testing
Business Improvement	Process Business transformation and reengineering; Process and workflow optimization; Organizational realignment and consolidation; Automation; Business process outsourcing; Solvency II regulation

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A.2 Mallik Akula – PeopleSoft Technical Consultant

SUMMARY:

Mr. Mallik Akula has over 14 years of Technical/ Functional, Application Design and Implementation of PeopleSoft experience. Expertise in designing and developing customizations, analysis, troubleshooting, interfaces, production support and reports for PeopleSoft Finance and SCM modules.

- Involved in development, production support, troubleshooting, change management, upgrade migration, application performance tuning and maintenance of PeopleSoft Applications.
- Developed customizations as per the functional specifications using Application Designer
- Involved extensively in developing, modifying, debugging and testing complex reports and processes using SQL's.
- Proficient in PeopleTools involving development with Application Designer; PeopleCode, Component Interfaces and AppEngine programs.
- Implemented PeopleSoft Workflow and email notifications for Requisition Approvals and Contracts status changes.
- Knowledge of PeopleSoft integration tools like Business Interlinks and Application messaging.
- Utilized Integration Broker to integrate PeopleSoft Financials with other applications.
- Expertise in reporting tools such as nVision, PS Query and Crystal reports.
- Good knowledge of PS Security Administration, creating Profiles, Roles and Permission lists.
- Upgrade of PeopleSoft 8.4 to PeopleSoft 9.0
- Knowledge of configuration of Tuxedo Application Server and WebLogic Web Server.
- Knowledge of Oracle WebCenter Capture, Oracle Forms Recognition, WebCenter Imaging, and WebCenter Content.
- Data migration/Conversion from Legacy systems to PeopleSoft database.
- Experience in Functional Documentation and Technical Design Documents.
- Experience in System Testing, Integration Testing and Documentation.

PROFESSIONAL EXPERIENCE:

Advance Digital Systems, Fairfax, VA
US House of Representatives, Washington, DC
Senior PeopleSoft Consultant

08/2009 - Current

Involved in Functional and Technical aspects of AM Implementation and Conversion. Production Support for GL, AP, AM, PO, AR modules.

- Implementation of the Asset Management (AM) and conversion of Assets from FAIMS (Oracle Apps)
- Custom Repayment plan to transfer the asset cost in installments to member accounts and create accounting entries
- Custom Maintenance plan to create payment schedules and generate vouchers
- Custom Mass Transfers / Mass Retirements by Location, Custodian and/or Organization.
- Accounting Entry creation as per federal accounting
- Integration with PO and AP for Asset creation
- PO Reference Voucher Workflow
- Reconciliation Summary and Details report to fix discrepancies.
- Custom page to fix AM accounting entries for CF errors.
- Commitment Control (KK) Reports for budget discrepancies.
- Responsible for providing Production Support
- Ongoing enhancements and month end processing support.
- Knowledge of PeopleSoft Test Framework
- Participated in PS Upgrade 8.9 to 9.1 and Tools 8.49 to 8.52
- Knowledge of Oracle WebCenter Capture, Oracle Forms Recognition, WebCenter Imaging, and

WebCenter Content

QUADRAMED - Reston, VA

06/2004 – 05/2009

Principal Software Engineer / PeopleSoft Consultant

**PeopleSoft Production Support for GL, AP, AM, PC, EX, PO, AR, BI, RM and CA modules
(Functional and Technical support of PeopleSoft Finance / SCM modules)**

- Implementation of the Contracts (CA) Project costing (PC) and conversion from CDI system
- Conversion of pending items from CDI to PeopleSoft
- Linking converted Contracts and Projects.
- Contracts Support Teams and Email notifications of status changes using workflow
- Association of Customer with Projects
- Setup the Rate Sets / Plans for PC pricing.
- PSA rules setup for Billing, Revenue and Adjustments.
- Integration of Time/Expense, Projects, Contracts and Billing

Environment: PeopleSoft Finance 8.4 / 9.0 (GL, AP, AM, PC, EX, PO, ePRO, AR, BI, RM and CA) with People Tools 8.42 / 8.49, MSSQL Server on Windows, MS Access/Excel

TIME WARNER CABLE - Charlotte, NC

06/2003 to 05/2004

PeopleSoft Consultant (GL/PC/INV/CM/AM/BI)

PeopleSoft Financials with emphasis on PC, INV, CM, AM and General Ledger

- Stock Request Correction.
- Search page for Material Stock Request (MSR) for selected BU / Order
- Correction page for MSR entries.

Global Infoware - San Jose, CA

03/1999 to 05/2003

PeopleSoft Consultant (Financial Modules)

- Developed and customized several pages, records.
- Developed conversion scripts to add new columns to custom versions of PeopleSoft delivered tables.
- Worked on Tree Manager and PS Query for analyzing and reporting of the applications

National Telecom of India Ltd., (NATELCO) - Hyderabad, India

01/1994 to 07/1998

Programmer/Analyst

- **Production Management system:** Production management system provides graphical user interface to store and retrieve product information, billing information, spares information. This software allocates the daily work schedule to production engineers automatically depending on master schedules. It also generates reports for executed works, daily reports on the spares availability, maintenance schedules and pending works.
- **Inventory Management system:** Inventory management system provides graphical user interface to store and retrieve product information, supplier information, and supplies and dispatches information. This software allows ABC analysis and various planning features to Material Managers. It also provides to generate reports for daily / weekly transactions product wise, customer wise and supplier wise.
- **Service Call Management system:** Service call management system provides graphical user interface to store and retrieve client information, product information, and service engineer information, billing information, spares information. This software allocates the daily work schedule to service engineers automatically depending on customer location and product. It also generates invoices for executed works, daily reports of the spares availability and pending works.

EDUCATION AND CERTIFICATIONS:

- Master's in Business Administration
- Bachelors of Science in Engineering

TECHNICAL SKILLS:

PeopleSoft Modules	General Ledger, Contracts, Project Costing, Asset Management, Expenses, Resource Management, Accounts Payables, Purchasing, ePro, Accounts Receivables and Billing.
PeopleSoft Technical	People Code, SQR, Application designer, Integration Broker, Query, Tree Manager, Application Engine, Process scheduler, Configuration Manager, Data Mover
Reporting Tools	Crystal reports, SQR, PS n/Vision
O/S	Windows and UNIX
RDMS	ORACLE, SQL Server
Languages	HTML, Visual Basic, 'C', SQL, and PL/SQL

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A.3 Katherine Wyatt – PeopleSoft Consultant (Financials)

SUMMARY:

Katherine is a 23 year veteran IT professional. A Senior Business Functional Analysis with expertise in project management, production support, business process re-engineering, application upgrades and new implementations across multiple applications and technologies. She has 13 years PeopleSoft experience with a successful history and qualifies in the areas of Finance, Procurement to Pay, Inventory Distribution, Cost Accounting, Project Costing, Asset Management, Manufacturing and Order Management. She has extensively worked in fit-gap analysis, requirements, design, conversion, interfaces, development and reporting and has successfully implemented seventeen end-end implementations. She has led teams and implemented quality deliverables using best practices, project methodology, project planning. She has a breadth of industry knowledge from private sector to public, including health care, government, financial services, telecom, hotel management, consumer goods, manufacturing and electronics.

She is a functional consultant but at the same time has a complete understanding of the complexities for integrating data exchanges, enhancements and software integration with a comparable technical ability to read PeopleCode and SQR's; write complex SQL's and perform bug tracking. **She was instrumental in the design and implementation of PeopleSoft Asset Management at U.S. House of Representatives.**

PROFESSIONAL EXPERIENCE:

Advance Digital Systems, VA

June 2012- Present

Client: U.S. House of Representatives

Sr. Lead Functional Consultant

Project: To support U.S. House of Representatives Asset Management Process Review project including review the as-is processes related to Asset Management (purchasing, receiving, tagging, transfers, moving, inventory, lost/damaged/stolen, personal liability process, and removals/disposals and proposing improvements including system improvements to the policies, procedures, and processes, and the PeopleSoft Financials application.

- Support Asset Management Process Review project.
- Provide expertise regarding how Application can be used to meet the project objectives.
- Support ERP PeopleSoft Financials production application, as well as its continued development, testing, and integration with primary focus on the Asset Management module, but also with other PeopleSoft modules and related applications;
- Assist with evaluating additional functionality and using current functionality in other ways to increase the benefits of the applications, especially for the Acquisition Management staff.
- Assist staff with mentoring, processing, troubleshooting, reporting, and reconciling Asset Management activity, especially as its interacts with other modules.
- Running reports, designing and testing new functionality.
- Training and supporting the project and staff from an Application perspective.
- Assist PeopleSoft support staff and work directly with the administrative users of the Application.

Informatica – Blackstone Technology

January 2011 – June 2012

Sr. Functional Implementation Consultant

Project: PeopleSoft 9.1 upgrade from 8.01. Modules include Purchasing, eProcurement, Requisition Workflow, Accounts Payable and Asset Management.

- Provide Application knowledge to existing IT team in Gap Fit Analysis and Software Configuration Design.
- Configure a 9.1 version for two Business Units and demo to team.
- Developed Functional Specifications for Accounts Payable and Purchasing interfaces.

U.S. House of Representatives – Deloitte

May 2011 – December 2011

Sr. Functional Consultant

Project: PeopleSoft 8.9 Post Production and Fiscal Year End Support of eProcurement, eProcurement Workflow Approval, Purchasing, Purchasing Workflow Approval and Account Payable.

- Develop and support procurement fiscal year end procedures.
- Perform Fit/Gap analysis for contract management requirements with Strategic Sourcing and Supplier Contracts.
- Researched productions issue for Procurement, Accounts Payable and Asset Management, resulting in 6 Oracle Patch resolutions.
- Review Matching Rules setup and recommend changes.
- Work with Auditors to resolve Entry Event out of balance issues.

**U.S. House of Representatives – Deloitte
2011**

November -2009 - March

Sr. Functional Implementation Consultant

Project: PeopleSoft 8.9 implementation of Asset Management

- Successfully design and configure the implementation of the Asset Management model, convert from Oracle, FFS and PD applications for the Atlas Project. Including design and testing Asset Conversion from Oracle Apps.
- Work with team on requirements, design and testing of two large customizations for Member Repayment and Asset Maintenance Management including interface to Account Payable.
- Create testing and training material. Perform Unit Testing and Training. Monitor System Testing.
- Create custom Queries and provide Production Support after Go Live.

Bank of New York Mellon – Wipro

March 2009 - November -2009

Sr. Functional Implementation Consultant

Project: PeopleSoft 8.9 Asset Management Business Process Reengineering Configuration Change and Conversion

**Salt River Pima-Maricopa Indian Community – Remy
2009**

June 2008 – January

Sr. Functional Implementation Consultant

Project: PeopleSoft 9.0 implementation of eProcurement, eProcurement Workflow Approval, Asset Management from excel data and to upgrade Project Costing from 8.8.

Lifespan Rhoda Island Hospital – Navisite

November 2007 – May 2008

Sr. Functional Consultant

Project: PeopleSoft 8.9 Post Go Live Support of INV, Cost Accounting, Purchasing, eProcurement, Requisition, Accounts Payable and General Ledger. Configured, tested, trained, and provided daily support. Prime focus, Inventory Replenishment, Par Replenishment and Matching.

**The Children's Hospital Denver – Remy
November 2007**

May 2006 –

Sr. Functional Implementation Consultant

Professional experience from 1978-2007, involving PeopleSoft Engagements will be provided upon request.

EDUCATION AND CERTIFICATIONS:

Bachelor of Science Degree in Computer Science and a minor in German

From Troy State University, Florida Region; maintained a 3.8 GPA.

TECHNICAL SKILLS:

APPLICATION FUNCTIONAL EXPERTISE: PeopleSoft eProcurement 8.4-9.0 (including Application Messaging Workflow), PeopleSoft Purchasing 7.5-9.0, PeopleSoft Accounts Payable 7.5-9.0, PeopleSoft Inventory 7.5-9.0, PeopleSoft Cost Management 7.5-9.0, PeopleSoft Accounts Receivable 7.5-9.0, PeopleSoft Billing 7.5-9.0, PeopleSoft Fixed Assets 7.5-9.0, PeopleSoft General Ledger 7.5-9.0, PeopleSoft Manufacturing 7.5-8.3, PeopleSoft Contract Management 7.5, PeopleSoft Project Costing 7.5-9.0, Oracle

Financials, Distribution Manufacturing V10-12, BAAN IV, 3.1a, 3.1b, 4, & V Financial, Distribution, MFG, Service, and Tools, ASK MANMAN all modules V5 – 8., Point.Man ERP expertise in Global Application

Languages: PeopleTools 7.5 - 8.4, SQR, SQL, PL*SQL, UNIX, PeopleSoft Application Engine 7.5 - 8.4, Crystal, 4GL COGNOS Powerhouse, Microsoft Office 95 – XP, MS Projects, Case Tools, VISIO, ABC FLOW, Lotus Notes, HTML, Perl, Java, and JavaScript, Oracle Reports and Forms, Agile, Gupta QUEST, FORTRAN, COBOL, Reflections 1&2, ProCom Plus, ROBELLE Supertool and Qedit, VESOFT MPEX, Security 3000, V3000, ADAGER, OCS Job Control software, Maestro, SOS system optimization, TRITON Tools

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A.4 Aeliegh Rothwell – PeopleSoft Consultant (HCM)

SUMMARY:

Ms. Rothwell has more than 25 years of experience delivering ground-breaking Human Capital Management solutions for Federal, State and Local Governments, Higher Education, and Commercial entities. With a richly diverse background and significant experience in project management, business process, and technology, Ms. Rothwell provides highly effective solutions for system consolidations, business process best practices, change management, and enterprise software implementation. Ms. Rothwell has over 15 years' experience in a variety of PeopleSoft applications, but is also versatile in many other software mediums, enabling her to quickly translate non-PeopleSoft processing to the current PeopleSoft products. Included in her capabilities, is the ability to translate HCM data to Financial accounting details. Providing comprehensive Disaster Recovery procedures and support, she has been responsible for successfully maintaining large databases during major hurricanes with no interruption in service. She has delivered world-class training manuals, documentation and procedures for many major organizations.

Ms. Rothwell specializes in Payroll and Time & Labor modules and has vast experience in providing Fit/Gap and functional analysis, Design and Configuration, Develop and execute Data Validation, Develop and execute test plan and scripts to cover all testing phases, Lead testing efforts of Time & Labor application, Compose Functional/Technical specifications, Customizations etc.

PROFESSIONAL EXPERIENCE:

Advance Digital Systems, VA

**3/2008 – Present
(02/2013 to present)**

Client: McLane Company

Senior PeopleSoft HCM Functional Lead Consultant

Mrs. Rothwell worked as the functional/technical lead to provide analysis and design and best practice solutions to configure the Time and Labor module. In addition, she provided technical expertise to create more than 40 T&L rules for a nationwide configuration of timekeeping and overtime needs. She provided the analysis of multiple modules, including HR, Benefits, Payroll and other functionality to provide solutions for cross-module connectivity and a custom attendance tracking. Ms Rothwell wrote the requirements document, provided estimates for all implementation tasks and created technical and functional design documentation. She provided test documents and job aids. In addition, she provided modifications to Absence Management configurations, to enable a variety of potential solutions. Ms Rothwell created role/permission list setups for HCM security to enable T&L entry, processing, workflow and approval processing. She created SQR programs, TL rules, custom pages and processing using various technical tools, and enabled connectivity between PeopleSoft Time and Labor to ATS timeclocks, via Cesium interface software.

Client: Pantex Plant

(11/2011 – 02/2013)

Mrs. Rothwell was the subject matter expert for Payroll and Time and Labor. In addition, she served as the SME for HR and Benefit configurations. She analyzed the HCM system issues and made recommendations to resolve over 42 issues. She implemented FLSA for North American Payroll and reconfigured time reporting codes, earnings codes, benefit configurations, FMLA settings and other HR configurations. Mrs. Rothwell wrote custom T&L application engine rules for 9/80 schedule processing, for payment of increments of pay, and for a custom leave process. She created business process for terminations, and provided multiple module documentation. She trained the staff on all module functionality. She provided the technical expertise to correct and create new customizations and worked on applying and testing multiple bundles and patches to the HCM system.

Client: Washington Metropolitan Area Transit Authority

(06/2010-10/2011)

Mrs. Rothwell provided interface solutions between the version 8.8 HRMS system and the version 9.1 Financials system.

Client: University of Arkansas

(09/2010-09/2011)

Mrs. Rothwell was the Senior Functional Consultant for a PeopleSoft 9.1 T&L rapid implementation. She was engaged to trouble-shoot an on-going, third party implementation and bring it 'back on track'. Mrs. Rothwell identified missing requirements and reconfigured time reporting codes, earnings, workgroups, T&L rules, and schedules. She trained staff on all Payroll, HR, Benefits and Time and Labor processes and procedures. She trained the campus staff on use of all Self Service and Manager Self Service functionality and provided a broad-based training solution to allow ongoing on-site and off-site training. Mrs. Rothwell provided full analysis and instruction on HR, Benefits, Payroll and Time and Labor module functionality and provided settings and instructions on implementing security. She provided the ability to migrate configurations between databases, created test scripts, completed unit testing and managed user acceptance testing. She configured the approval framework and workflow for later implementation.

Client: Washington Metropolitan Area Transit Authority (04/2010-08/2010)

Mrs. Rothwell was a subject matter expert for the PeopleSoft 9.1 HCM assessment with concentration on T&L, Absence Management, performance, development, and ELM. She was the lead consultant for multiple modules for the upgrade of HCM 8.8 to 9.1, and assessment of added module implementations including Profile Management and Payroll. She analyzed and documented current Business Processes for best practice, efficiency, effectiveness, data accuracy, configuration issues, automation versus manual processing, and other attributes. In addition, she analyzed and documented requirements to capabilities of HCM 9.1, determining fit or gap. Mrs. Rothwell presented future business process flowcharts and HCM 9.1 capability, and worked on the final assessment documentation presented to WMATA.

Client: Lexington Fayette Urban County Government (04/2008-02/2010)

Howard University 09/2007-3/2008

Harris Corporation 08/1998-08/2006

United Space Alliance 03/1995-07/1998

EDUCATION AND CERTIFICATIONS:

Masters of Business Administration, Webster University, 2006.

Bachelor of Science, Computer Information Systems, Rollins College, 2002.

Associate of Arts, Brevard Community College, 1998.

Associate of Applied Science in Computer Programming, Columbus Technical College, 1991.

CERTIFICATIONS:

PeopleSoft HR, Benefits, Payroll, Time and Labor Certified, 1995.

PeopleTools I & II Certified, 1995, 2002.

PeopleCode Certified, 1995, 2002.

TECHNICAL SKILLS:

PeopleSoft

- PeopleSoft HRMS 9.1, 9.0, 8.9, 8.01, 7.5, 6
 - HR, Base Benefits, T&L, Payroll, Absence Management, eBenefits, ePay, ePerformance, eDevelopment, Succession Planning, Profile Management, Training Administration, Compensation, Salary Planning, Health & Safety, Workflow, Approval & Delegation
- PeopleSoft ELM (Enterprise Learning Management)
- PeopleTools I & II Certified, SQL, PeopleSoft Query, Component Interface, Crystal, SQR, Workflow, PeopleCode, Application Designer, Application Engine, Former Oracle DBA, multiple other tools, databases and software

Business Process

- Project Management, Business Process Improvement,

- Infrastructure Analysis and Requirements Definition, Deliverable Management & Quality Assurance, Change Management, Training Curriculum & Execution,
- Fit Gap Analysis,
- Functional Configuration,
- Database Consolidation,
- Test Scripting & Execution, Customization Design & Code,
- Implementation & Upgrade,
- Post Implementation Support

Industry

- Public Sector, State/Local, Higher Education

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A.5 Nakul Sharma – PeopleSoft Administrator

SUMMARY:

Nakul Sharma has over Nine (9) years of hands-on experience as a PeopleSoft Administrator, possess complete life cycle knowledge including Installation, Configuration, Development, Testing and Deployment of PeopleSoft HCM/HRMS, PeopleSoft Financials/SCM, ELM, Enterprise Portal product lines has extensive experience in performing PeopleTools and Application Upgrades of PeopleSoft Financials & SCM, HCM/HRMS and Enterprise Portal applications. Migration experience includes Patches and Fixes, Bundles, Maintenance Packs, Tax Updates and Service Packs across PeopleSoft environments manually and using Quest STAT product. Responsibilities also include Security Administration, installing & configuring App servers, Web servers, Process Schedulers, PeopleSoft Internet Architecture (PIA) and Portal on Windows, UNIX and Linux.

PROFESSIONAL EXPERIENCE:

Advance Digital Systems, VA

June 2008 - Present

Client: NorthgateArinso – Round Rock, TX

(May '11 – Till Date)

PeopleSoft Administrator/Upgrader

Assist with the integration of **PeopleSoft HCM System with other systems such as PeopleSoft Financials and Enterprise Portal**. As the primary PeopleSoft architect, was responsible for the high-level design/maintenance of PeopleSoft infrastructure including web servers, application servers and batch servers.

- ☞ Installed, configured and tuned PeopleSoft's Human Capital Management (HCM) version 8.9 and 9.1 MP5 and PeopleSoft's Enterprise Portal 9.1 applications on PeopleTools 8.51.09, 8.49.22 versions and all associated middleware and third party products (Tuxedo, WebLogic, Crystal) in a Sun Solaris 10 environment & Windows 2003 for the Upgrade purposes.
- ☞ Experienced in PeopleSoft Technical Architecture Design, System Sizing, Capacity Planning and Application Installation/Configuration/Administration of different PeopleSoft product lines.
- ☞ Designed the physical and logical layout of the servers (3 tier architecture) was done based on user requirements, scalability needs and uptime requirements.
- ☞ Performed HR to ELM full synchronization by configuring the EIP at the Integration Broker level
- ☞ Worked very closely with the developers on troubleshooting issues in a heavily customized system involving multiple third party agencies where more than 90% of the original application has been customized.

- **PeopleSoft Patch Management/Upgrades**

- Researched & applied Patches and Fixes/Maintenance Packs/Tax Updates manually and using Change Assistant PeopleTools versions.
- Download the PeopleSoft software from eDelivery and performed PeopleSoft HCM 8.9/9.1 MP5 & PeopleTools 8.51.09 installation on File Server, Batch Server (PSNT), Web Server, Application Server and Process Scheduler Server (PSUNX) – Solaris 10
- Configured Environment Management Agents and set them to crawl Web, Application, Process Scheduler, and File Servers and publish management information to the Environment Management Hub for download and application of PeopleSoft change packages (Bundles).
- Performed installation and upgrades on the HCM 8.9 and 9.1 MP5 and Enterprise Portal 9.1 applications as well as upgraded from PeopleTools 8.22.07/HCM 8.3 to PeopleTools 8.51.09/ HCM 8.9 and 9.1 MP6, PeopleTools 8.49.13/Portal 8.8 to PeopleTools 8.51.09/Portal 9.1 with Change Assistant.
- Well versed with the two-step upgrade path of HRMS 8.3 to HCM 9.1 with a merged template, which provides a single point of upgrade process management
- Planned Upgrade activities including tasks such as reviewing PeopleSoft Customer Connection for Applying Updates and fixes required for upgrade, assess existing hardware and software requirements for additional storage and horsepower in the servers to accomplish a smooth install/upgrade, validate

- platform certifications and review documentation (e.g., release notes, white papers, red papers)
- Requested the UNIX Admins to move certain Database Backups to a separate tape for a certain period of time during Upgrade activities
- Performed objects and code migration of more than 250 custom projects between various environments as part of the upgrade
- Plan and design the Infrastructure strategy to setup new Environments (DEV/TST/QAT/PRD) for the new PeopleTools 8.51.09 environment for the new HCM and Portal Applications to reside after the upgrade.
- Created a Performance Tuning document for the new environment and performed a minimal Load Testing to review the new architecture prior to cutover.
- ☞ Applied multiple Bundles for both the HRMS 9.1 (current bundle version 8) and ELM 9.1 (current bundle version 8) applications Configure Application Messaging setup between Financials/SCM and HCM environments & Enterprise Portal DEV, TST, QAT & Production environments
- ☞ Assisted Security Administrator in creating custom Roles and Permission lists to meet the client's requirements and acted as a backup Security Administrator.
- ☞ Installed PeopleBooks for PeopleTools and both HCM and ELM applications and configured the Web Server to access the PeopleBooks and also utilized the hosted PeopleBooks option provided by Oracle for Sandbox environments.
- ☞ Involved in setting up the e-Recruit website for applicants to access the HCM System
- ☞ Setup dedicated web server domains (Candidate Gateway) and defined separate web profiles for e-Recruit.
- ☞ Use Quest STAT 5.3.0 to migrate PeopleSoft objects & non-PeopleSoft objects using STAT CSRs (Change Service Request) between QAT & PRD environments and ensure the integrity of the servers which adhere to the migration workflow, and improves their change management practices
- ☞ Involved in creating a master document for database cloning/refreshing procedures for separate PeopleSoft product lines (Portal/HCM/Fin) & separate environments (DEV/TST/QAT)

Tools Used: Solaris 9/10, IBM-AIX Oracle 11g, PeopleTools (8.22.07/8.51.09) HCM Upgrade (8.3 to 9.1 – 2 step upgrade – 8.3 to 8.9 & 8.9 to 9.1 MP5), Enterprise Portal Upgrade 8.8 to 9.1, PeopleTools 8.49.13 to 8.51.09, BEA WebLogic 10.3.1/9.2 MP3/8.1 SP5 Temporary Patch 2, 6.1 SP 17, Tuxedo 10gR2/9.1/8.1/6.1, Change Assistant, Redhat Linux, Windows 2000/2003

Client: Carlson Companies, Inc. – Minnetonka, MN
PeopleSoft Administrator

Jan '10 – Apr '11

Client: Northwestern Mutual - Milwaukee, WI
PeopleSoft Systems Administrator

Jun '08 – Dec '10

BI Performance, MN
PeopleSoft Systems Administrator

Oct '05 – May '08

GMAC Commercial Mortgage – Horsham, PA
PeopleSoft Systems Administrator

Nov '03 – Sep '05

EDUCATION AND CERTIFICATIONS:

Bachelor of Engineering: Computer Science and Information Technology - INDIA

TRAINING:

- PeopleSoft Server Administration 8.48
- Data Management & Upgrade Rel 8.46

TECHNICAL SKILLS:

ERP Packages	PeopleSoft Financials/SCM (version 8.4, 8.9, 9.0, 9.1), HRMS/HCM (8.3, 8.8, 8.9,
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	9.0, 9.1), PeopleSoft Enterprise Portal (8.8 & 9.0), ELM 9.1 (Bundle 8) PeopleTools 8.14, 8.43, 8.45, 8.48, 8.49, 8.50, 8.51, 8.52
PeopleTools	Configuration Manager, Application Designer, Data Mover, Process Scheduler, Process Monitor, Application Messaging Monitor, Upgrade/Change Assistant, RenServer
Databases	MS SQL Server 2000, 2005, Oracle 8i, 9i, 10g R2
Database Tools	MS SQL Server (SQL Enterprise Manager, Query Analyzer, SQL Profiler). Oracle (Oracle Enterprise Manager, SQL*Plus, SQL Loader, DB Configuration Assistant)
Hardware	Sun SPARC M4000, M3000, T5220, T2000, Sun Fire 15K, Sun 6320 Storage , Sun Enterprise Servers 890/880, Hitachi, EMC-VMAX, EMC-DMX
Operating Systems	Solaris 8/9/10, AIX 5.3/7.1, HP-UX, Linux 5/6
Web Servers	BEA WebLogic 5.1, 6.5, 8.1 SP5, 9.2, 10.3.1
Networking	LAN/WAN, Firewalls, Routers, Load Balancers (CSS/F5/ACE)

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A.6 William Reiss – PeopleSoft Campus Solution Consultant

SUMMARY:

Over 20 years of experience with human resources, payroll, retail, and financial applications. I have worked exclusively on PeopleSoft projects since 1990 on HCM, Campus Solutions, Financials, and Student Administration suites. Projects have included new implementations, upgrades, data conversions, complex customizations, development of a variety of payroll, time and attendance, year-end processing, and general ledger interfaces.

PROFESSIONAL EXPERIENCE:

Advance Digital Systems, Fairfax, VA **8/2012 - Present**

University of Chicago, Chicago, IL **6/2013 – Present**

PeopleSoft HCM Upgrade: Version 9.0 to 9.2. Environment: Oracle 11g, HCM, PeopleTools 8.53.
Development tools: Application Designer, SQR, and SQL Developer.

- Develop interface programs between PeopleSoft HCM, Campus Solutions and Taleo.
- Reapplied customizations to SQR, PeopleCode, Payroll, Campus Solutions
- Retrofitted Payroll and Time & Labor inbound and outbound interfaces.

Oxy Inc., Houston, TX **8/2012 - 5/2013**

PeopleSoft HCM upgrade: Version 8.9 to 9.1. Environment: Microsoft SQL Server, HCM, PeopleTools 8.52. Development tools: Application Designer, COBOL, SQR, PS/Query, and Quest STAT.

- Reapplied customizations to SQR, PeopleCode, Pages, and PeopleSoft Payroll COBOL.
- Modified customizations for Payroll COBOL that reduced the number of customized modules.
- Worked directly with payroll department to develop functional specifications, AE and SQR programs, and user acceptance testing for new reports and processes.
- Converted stored procedures to Application Engines. For one process, run time was reduced from over 2 hours down to 10 minutes.
- Developed a Leave Plan based on Service Hours, and an SQR program to load Service Hours monthly, which eliminated customizations for Leave Accrual COBOL. Worked with payroll and HR users to perform system integration testing.

Solar Turbines Incorporated, San Diego, CA **10/2011 - 7/2012**

PeopleSoft Technical Consultant –

PeopleSoft HCM upgrade: Version 8.8 to 9.1. Environment: DB2, HCM, PeopleTools 8.49 / 8.51.
Development tools: Application Designer, PeopleCode, XML Publisher, SQR, and PS/Query.

- Retrofitted custom SQR, PS Queries, Records, PeopleCode, and Pages. Used XML Publisher to create paychecks and advice reports for printing and employee self-service. Assisted functional analysts in system integration and parallel testing.
- Retrofitted Payroll and Time and Labor inbound and outbound interfaces. During system integration and parallel testing, worked with Functional Analysts to identify root cause of differences between old and new versions; Corrected programs or noted reason for differences as needed.

California State University, San Marcos, CA **10/2008 - 6/2011**
Analyst/Programmer

Provide system development and support for Oracle PeopleSoft applications. Environment: Oracle 11g, HCM / Campus Solutions 8.9 /9.0 (PeopleTools 8.49 / 8.50).

- Developed enhancements, interfaces, queries, and reports for PeopleSoft HCM and Campus Solutions modules. Development tools used include Application Designer, PeopleCode, Application Engine, SQR, Component Interface, PS/Query, Integration Broker, and PL/SQL.
- Provided production support for all HCM issues, including Integration Broker setup, and problems with Service Operations, on-line applications, and batch processing.
- Upgraded HCM and Student Administration modules from version 8.9 to 9.0: Candidate Gateway and custom enhancements. Configure Integration Broker Nodes and Service Operations.

AMN Healthcare, INC., San Diego, CA

5/2004 - 1/2008

Lead Application Engineer

Primary technical responsibility for all system development projects related to PeopleSoft, including development of enhancements, interfaces, conversions, reports, production support escalation, and implementation of vendor hot fix and version upgrades. Supervised and reviewed the work of two other PeopleSoft developers. I performed DBA tasks when the primary DBA was not available. Environment: Microsoft SQL Server 2000, Financials/SCM 8.40 (PeopleTools 8.42), HRMS 8.3 SP 1 (PeopleTools 8.19). Development tools: Application Engine, SQR, Component Interface, and PS/Query.

- Developed enhancements, interfaces, conversions, queries, and reports for PeopleSoft HR, Payroll, Time and Labor, Benefits, and Billing modules. During a re-write of a custom Time and Labor Application Engine program, I reduced the weekly run time from 25 hours to 1 hour.
- DBA activities: Resolved issues with SQL Server Agent Jobs, PeopleSoft Process Servers, Application Servers, and Application Message Servers. Performed production database backups and restored to development environments. Migrated PeopleSoft changes from development to production environments and made changes to security. Tuned poor performing SQL statements.

BEA SYSTEMS, San Jose, CA

6/2002 – 2/2004

Applications Developer II

Developed system interfaces and implemented software upgrades for enterprise wide and internal functional areas. Environment: Oracle 8.1.7, Solaris UNIX, PeopleTools 8.16, HRMS 8 SP1.

- Identified and applied PeopleSoft patches that affected eBenefits Open Enrollment.
- Configured PeopleSoft Payroll Interface to create a data file for ADP Pro Business.
- Modified workflow to eliminate duplicates in approval chain, check for changes in next approver, update Job Data after last approval, and send email notifications for completions and denials.

Soft Link, Inc., Maplewood, MN

8/1993 – 6/2002

Senior PeopleSoft Consultant

Provide consulting services for the implementation and support of PeopleSoft HRMS, Payroll, Financials, and CRM modules. Assignments included:

Patio Enclosures, Inc., Macedonia, OH

10/2001 – 2/2002

- Developed customizations for CRM Sales, CRM Field Service, and a custom cash management application. Customized Sales Opportunity Detail, Service Orders, and Worker Calendars.

Environment: PS CRM 8.00, PeopleTools 8.14, and Microsoft SQL Server 2000.

3M, St. Paul, MN

1/1999 – 3/2001

- During a new implementation, designed and developed customizations for manager self-service.
- Developed interface between staffing system and PS HRMS. Batch interface programs were developed in COBOL with native DB2 calls.

Environment: PS HRMS 7.5, MVS/TSO, SQR, VS COBOL II, and IBM DB2 database.

Giant Eagle, Pittsburg, PA

Periodically from 10/1997 – 8/1998

- Documented client requested changes to the PS delivered GL Interface program. Identified the GL Interface tables that needed to be setup on the PS HRMS database. Customized the PeopleSoft GL Interface program from PS HRMS to PS Financials.

Wells Fargo - Formerly known as Norwest Bank, St. Paul, MN

Periodically during 1996 - 1999

- Developed custom SQR reports and on-line changes for Accounts Payable and Asset Management.

Environment: PS Financials 6, UNIX, and Oracle database.

Dana Corporation, Toledo, OH

Periodically from 8/1993 – 1/2001

- Worked with payroll users to develop custom SQR reports and COBOL modules for PS HRMS/Payroll.
- Worked with payroll users to develop processes to load one-time pay sheet data and created outbound files to vendors.

Environment: PS HRMS/Payroll 6, UNIX, and Oracle database. During first two years, used MVS/TSO and IBM DB2 database.

EDUCATION AND CERTIFICATIONS:

MBA, Finance, Golden Gate University, San Francisco, CA

Bachelor of Science, Chemistry, Miami University, Oxford, OH

TECHNICAL SKILLS:

PeopleSoft HCM 9.1	PeopleTools 8.52	SQL 20+ Yrs.
SQR - 20+ Yrs.	PeopleSoft COBOL – 10+ Yrs.	PS/Query 10+ Yrs.
UNIX – 10+ Yrs.	XML Publisher	PL/SQL - 2 Yrs.
Benefits Administration 5+ Yrs.	Payroll – 10+ Yrs.	Integration Broker 8+ Yrs.
Component Interfaces – 10+ Yrs.	Data Conversions – 10+ Yrs.	Workflow – 2 Yrs.
Application Engine – 10 Yrs.	Quest STAT	PeopleCode – 20+ Yrs.

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A.7 Hyun S. Kim – Senior Oracle Database Administrator/Developer

SUMMARY:

Ms. Kim has over 20 years of professional experience as an Oracle Database Administrator, Oracle Database Developer. Her experience includes design, implementation, customization, maintenance and administration of complex database and related systems. Has extensive experience in design and implementation of Oracle RAC, ASM, RMAN etc. Solid skills in performance tuning, incident resolution, problem determination, root-cause analysis, database security, and database change management. Has experience from Oracle version 7 thru 11g Rel12. Good experience in PL/SQL Development, and possess experience in Java Programming. Holds a Master's Degree in Computer Science, Oracle Certified Professional (DBA) and a Sun Certified Java Programmer.

Guest Speaker of Oracle Open World 2011 on Oracle TimesTen In-Memory Database and Internet Application.

PROFESSIONAL EXPERIENCE:

Advance Digital Systems, VA

8/2005- Present

Sr. Oracle DBA

Client: US Census Board

Role: Oracle Database Administrator

Have been working on the US Census project as a DBA and database developer. Responsibilities for the UK Census full development/production system cycle include:

- Creating and implementing database schemas for Response databases for Paper forms (21 types of forms) for C#/.NET application in Windows 2003 platform
- Creating and implementing database schemas for Internet Data Capture systems (8 types of forms) for Java/JSP/Servlet/Spring Framework/JBoss Portal applications in Redhat 5 Linux platform
- Designing and implementing TimesTen In-Memory databases for Internet Data Capture application to support 162,000 concurrent users, residing between JBoss and Oracle 11g Rel2 database in Linux platform
- Designing and implementing physical standby RAC DataGuard for Internet database for failover in Linux platform
- Installing and managing 15 different types of Oracle10g/11g Rel2 RAC and non-RAC databases in Windows 2003 and RedHat 5 Linux platforms
- Supporting two way Advanced Replication in Linux and Windows platforms
- Installing and maintaining JBoss Portal schema repository in Oracle in Linux platform
- Installing and maintaining Plexus Workflow schema repository in Oracle in Windows platform
- Creating and maintaining Linux Shell and Windows Batch scripts for installation, RMAN backup (differential, cumulative, and full) / recovery, datapump, statistics gathering, Linux cron job/Windows scheduling, monitor, and Oracle partition to support all of the RAC and non-RAC database components stated above
- Creating PL/SQL wrapper functions and Java Stored Procedures to encode and decode passwords used throughout the UK/US/Canada Census Data Capture system
- Monitoring and administrating database activities using Grid Control (OMS 10g, agents 10g/11g)
- Creating and maintaining database design, installation, and maintenance documents for all database related activities
- Supporting UK Census production system

Oracle Corporation

2/1999 – 7/2005

Roles: Oracle Database Administrator / Oracle Data Warehouse Developer

OAF/BC4J/POJO/ Developer / PL/SQL Web Tool Kit Developer

Oracle Data Consolidation Analyst

- Worked as an Oracle application developer on Transportation Security Administration's HTML Service Upgrade project extending the E-Business Suite's Customer Support Application (Tele Service module). Modified the Personalize Page and Personalize Region. Used 9i JDeveloper with OA Extension.
- Worked as an Oracle application developer to create the NAS Data Desk Workflow System using Oracle Application Framework/BC4J/POJO/UIX
- Worked as an ADF technology specialist supporting developers building FDA/CDER (Food and Drug Administration/Center for Drug Evaluation and Research)'s DARRTS (Document Archiving, Reporting and Regulatory Tracking System) using Oracle ADF/BC4J/UIX (Developer 10.1.2). Task responsibilities included supporting J2EE developers with research and advising on ADF/UIX/BC technology stack questions and issues.
- Created the FDA/CBER (Food and Drug Administration/Center for Biologics Evaluation and Research)'s first J2EE application, PTS (Presubmission Tracking System), using JDeveloper 10g ADF. Designed the J2EE PTS prototype application and implemented it using Oracle ADF/BC4J/UIX (JDeveloper 10.1.2) and Oracle 10g Database (10.1.0.2). The PTS security was implemented using Oracle XML file based security provider (JAZN) for the application authentication and authorization. The PTS application was deployed to Oracle 10g AS (10.1.2).
- Worked on US Census Geography Division's Tiger/MAF project, migrating the legacy system to Oracle 10g based Topology/Spatial database. Customized the Acquis Map Editor application, which was based on Oracle Map Viewer, to implement Census usage specific functions.
- Worked on NCICB (National Cancer Institute Center for Bioinformatics) caDSR (Cancer Data Standards Repository) supporting the metadata repository application written in PL/SQL Web Toolkit. Also worked on creating interface APIs using Java and Java Stored Procedures to access NCI EVS (Enterprise Vocabulary System) from the PL/SQL and Java applications. Also worked on creating new functions on CRF (Case Report Forms) Compliance Review and Response system using Java/BC4J/JSP/Servlet on Oracle 9iAS. All applications were built using Oracle 8.1.7 on Win2000/Unix and JDeveloper 9.0.3.
- Worked on FDA (Food and Drug Administration) FACTS (Field Accomplishments and Compliance Tracking System) ORA (Office of Regulatory Affairs) Proof-of-Concept task to create the Firms Web System. The task was converting an Oracle Forms Client/Server application to a Web/MVC/Java/Servlet/JSP/UIX/BC4J/JavaScript application using 9i JDeveloper and Oracle 8.1.7 on Win2000, Oracle 9i/9iAS on Sun/Solaris. The application was for registering, profiling, merging, and maintaining firms around the world accessing the FACTS/ORA/Firms system.
- Worked on US PTO (Patent and Trademark Office) XML Proof-of-Concept task to create the XML document processing system (XML transaction file registration, XML transaction validation against PTO DTD and Madrid Protocol, Madrid Protocol Registration GUI, XML transaction file creation from Oracle 8i) using MVC Framework. The application was implemented using Oracle 8i, Java/Servlet/JSP/EJB/JavaScript, Oracle XML/XDK, JDeveloper, and Apache Tomcat3.1 on WinNT.
- Worked as an Oracle developer to maintain and enhance SSA POMS System (Social Security Administration Policy Repository Management System). Worked as a DBA to migrate the system from OAS3.0, Oracle 8.0.6, Sun/Solaris2.5, WinNT to OAS4.0.8, Oracle 8.1.6, Sun Sparc 450/Solaris2.6, WinNT. The application was built based on Designer6 PL/SQL Web Server Generation.
- Worked on eGrants internal task to create a self-service web application that allows federal, state, and local government agencies to quickly deploy an Internet solution for electronic submission of grant submission and approval applications. Used PL/SQL Web Toolkit, Oracle Application Server (4.0.8), and Oracle Enterprise Server (8.1.5) on WinNT.

Lockheed Martin Space Mission Systems & Services

8/1997 - 2/1999

Oracle DBA / Database Developer

Worked on the year 2000 Census, DCS (Data Capture System) project as a DBA and database developer to create the database system to capture data from Year 2000 census forms. Designed the DCS database system and implemented it on Oracle Server 7.3.3/Windows NT servers and workstations. Oracle Designer 2000 was used as a design tool. The architecture of the system was Client/Server involving 1200 PCs per DCC (Data

Capture Center). Responsibilities of the task included to install the database software, to design and implement the logical database, to design and implement the database access units using the embedded SQL and PL/SQL in Visual C++, and to administer Oracle supporting Windows NT Tivoli and HP/Openview.

Century Computing, Incorporated (Currently Commerce One)

6/1987 - 8/1997

Oracle DBA / Oracle Developer

- Worked on a NASA-Goddard task, Landsat 7 Satellite Data Processing System (LPS) as an Oracle DBA. Designed the LPS database system and implemented it on the Oracle Server 7.3/IRIX6.2/Silicon Graphics Challenger. Teamwork and the E-R Diagram were used as design tools. The architecture of the system was Client/Server within a host machine, and transactions involve the distributed options. Responsibilities of the task included installing the database software, to design and implement the logical database, to design and implement the database access units using the embedded SQL and PL/SQL in C, and to support the LPS database users.
- Worked on the LPS as the leader of the Management and Control Subsystem (MACS). The MACS was the LPS master control subsystem to capture, to process, and to transfer the Landsat 7 data. Designed the MACS using Teamwork and implemented the design using the C language on IRIX6.2/SGI. Used the Developer 2000 tools (Oracle Forms 4.5 and Report 2.5) to create the LPS operator GUI screens and the various LPS reports. PL/SQL was used to create triggers of Forms and Reports. X terminals and SG Indigos were used to run the LPS GUI.
- The C language, Silicon Graphics GL, and FORMS were used on the SG Personal Iris machine. The display data were retrieved from the Sybase database system.
- Ported the radar ID classifying expert system from the IBM PC/Common Lisp to the Silicon Graphics/AKCL Lisp. Created a user interface display panel for the expert system.
- Sybase database system administrator for ATD/ESM. Created the emitter and platform parametric database in Sybase in Silicon Graphics VGX/IRIX and ported data from the Oracle database system in VAX/VMS.

Georgetown University

8/1998 – 9/2000

Part Time Instructor (Adjunct Professor)

Taught Database Design with Oracle, and Databases on World Wide Web classes. The course content included teaching database concept, database modeling (ODL:Object Definition Language, ERD), normalization, relational algebra, SQL3/OQL. The courses included a semester long project to design and implement a web transaction system using PL/SQL, C++ or Java accessing database over the OAS web server. Installed, configured, and maintained Oracle 8i, OAS4.0.8, PL/SQL and JWeb Cartridges on both Sun/Solaris 2.6 and WinNT4.

University of Maryland, University College, College Park, Maryland

9/1987 - 9/1992

Taught a senior/graduate level "Database Design" course. The course objective was to present database design concepts and theoretical foundations of database systems. The course contents included logical and physical level database design. The system used by the course work was the Informix relational database system on HP/UX.

EDUCATION AND CERTIFICATIONS:

M.S. Computer Science, University of Maryland

Thesis: Object-Oriented Model for Relational Database System

B.A. Computer Science/Mathematics, New York University

CERTIFICATIONS:

Sun Certified Programmer, Java 2 Platform

Oracle Certified Professional (DBA)

PUBLICATION

- Publication: “ROOST”: A Relational Object Oriented System, proceedings of International Conference on Foundations of Data Organizations and Algorithms, June 1989
- Guest Speaker of Oracle Open World 2011 on Oracle TimesTen In-Memory Database and Internet Application, October 2011
- Session - How Do You Handle Oracle TimesTen Application and Database Changes in an Agile World?

TECHNICAL SKILLS:

- **Oracle Products:** Oracle (11g Rel2, 10g, 9i, 8, 7) Database, Oracle RAC/ASM 11g Rel2, 10g Cluster, Oracle Data Guard 11g, Oracle Grid Control 11g/10g, Oracle Advanced Replication, RMAN, ASM, Data pump, Oracle ADDM (Automatic Database Diagnostic Monitor), AWR (Automatic Workload Repository), Oracle TimesTen In-Memory Database 11g Rel2, Oracle JDeveloper, Oracle10g Spatial, Oracle XML Database, Oracle Express Server, Oracle Data Warehousing, Oracle Transparent Gateway, Developer 2000, Designer/2000, ProC/C++, PL/SQL with Web Tool Kit, Oracle Application Framework, Oracle BPEL Process Manager, Oracle Streams
- **Web Server:** Oracle AS (10g, 9i), Oracle Internet Application Server (3, 4), Apache Tomcat, iPlanet, Web Logic(9.2, 8.1)
- **Operating Systems:** RedHat v5.5 for x86_64-bit AMD64, UNIX (SG/IRIX, SUN/Solaris10, HP/UX), MS Windows 7/2003/XP/2000/NT/98/95
- **Languages/Framework:** Unix/Linux Shell script, Windows Batch script, Java, JSP, UIX, XML, Pro*C/C++, PL/SQL with Web Tool Kit, C/C++, Silicon Graphics GL, COBOL, FORTRAN, PL/I, Java Script, BPEL, Oracle Application Develop Framework, Spring Framework, Hibernate, DQL, SQL/PLSQL
- **Databases:** Oracle, DB2, Sybase, Access
- **IDE:** Eclipse, JDeveloper
- **Management/Leadership Skills:** Leader DBA, System Task Leader, Technical Manager
- **Specialty Skills:** Database Designer/Developer, J2EE Developer/Architect, and University Instructor
- **Methodologies:** UML, ODL, JCDM (Oracle Java Custom Development Methodology)

A.8 Krystyna Joniak – PeopleSoft Trainer & UPK Developer

SUMMARY:

Highly productive, self-motivated professional with over fifteen (15) years of experience, ability to provide exceptional results. Has excellent management skills enabling to complete projects efficiently, effectively, and with ease. Ability to analyze training requirements, perform process re-engineering, create detailed work plans, provide quality assurance, and mentoring staff qualify me to serve on and/or lead training teams for any ERP (PeopleSoft and Oracle EBS) system implementation. Subject Matter Expertise in UPK.

Common project responsibilities: Design and develop instructor-led training curriculum, computer-based simulations, job aids, quick reference guides, and training development guidelines and templates. Strategically develop and manage to detailed work plans and status trackers, perform needs analysis to determine course roles and content, and provide training expertise to junior and/or client training developers. Design, populate, and test the data staging of the training environment. Manage and resolve training environment defects. Provide start-to-end curriculum development, and manage training team.

Security Administration: Analyze business requirements to design, build, and test custom security profiles for the training environment. Modified permissions lists and roles, configured and implemented workflow and provided direction for the mass creation of user id's, configured user preferences, and researched and resolved training environment security issues.

Industry Experience: Advertising, Government, International, Home Furnishing/Improvement, Publishing, Financial, Education, Insurance, Sales & Marketing, Manufacturing, *Transportation* and Utility.

PROFESSIONAL EXPERIENCE:

Aviat Networks Santa Clara, CA

2/2013 - Present

Lead Training Developer

As an independent consultant through Price Waterhouse Coopers, accomplishment include:

- Develop a detailed training project plan to include delivery strategy, detailed curriculum, deliverable due dates, and user to course mapping.
- Develop training schedule.
- Develop Access database to track courseware development.
- Manage off-shore content developers.
- Technology Used: Oracle 12i iProcurement, Purchasing, Accounts Payable, iExpense, Access, User Productivity Kit (UPK) 11.0

Laclede Gas St. Louis, MO.

5/2012-1/2013

Lead Training Developer

As an independent consultant through Price Waterhouse Coopers, accomplishment include:

- Developed a detailed training project plan to include delivery strategy, detailed curriculum, and deliverable due dates.
- Developed Access database to track courseware development
- Developed end-user training manuals, job aids for iProcurement, Purchasing, Accounts Payable, iExpense, and iSupplier.
- Technology Used: Oracle 12i iProcurement, Purchasing, Accounts Payable, iExpense, iSupplier, Access, User Productivity Kit (UPK) 11.0

University of Calgary Calgary, Canada

11/2011-12/2011

Senior Training Developer

As an independent consultant through IBM Canada, accomplishment include:

- Performed training needs assessment for the Supply Chain Management Group.

- Developed project plan and documented 26 procedures.

Advance Digital Systems, VA

4/2011 - Present

Client: Washington Area Metropolitan Transit Authority (Transportation), Washington, DC

Training Team Lead

As an independent consultant through Metaformers, Inc., accomplishments include:

- Developed a detailed training plan to include training strategy, detailed curriculum, training schedule, and mapped employees to security roles.
- Developed an Access database to track courseware development, milestones, class scheduling, mapping employees to roles, courses, and security access, and applicable reporting.
- Developed work plans, managed staff and deliverables.
- Oversaw and participated in the developing of 300 UPK simulations.
- Developed security role descriptions, worked with a variety of departments to validate security role mapping, maintained security role mapping database, conducted a variety of comparisons/validations to ensure go-live security role mapping was accurate.
- Wrote project milestones communications and project deliverables.
- Technology Used: Microsoft Access, Oracle UPK 3.5.1, PeopleSoft 9.1 eProcurement, EPM

Portland General Electric (Utility) Portland, OR

9/2010-3/2011

Training Team Lead

As an independent consultant through Price Waterhouse Coopers, accomplishments included:

- Successfully developed user guides and job aids, for 62 AP & GL topics.
- Successfully developed power point presentations and exercises for 100 AP, GL, ePro, Purchasing, and INV topics.
- Developed an Access database to track courseware development, milestones, class scheduling, mapping employees to roles, courses, and security access, and applicable reporting.
- Developed work plans, managed staff and deliverables.
- Maintained issue log and resolved issues.
- Technology Used: PeopleSoft AP, GL, ePro, PO, INV, CON 9.1, Microsoft Access

Black Hills Corporation (Utility) Rapid City, SD

7/2010-8/2010

Senior Training Developer

As an independent consultant through SkyBridge Global, accomplishments include:

- Relief consultant – successfully created essential training documentation for go-live within 10 days.
- Managed efforts of two additional training team members ensuring documentation was created on plan.
- Mentored staff members in curriculum design.
- Successfully completed 175 simulations within 45 days.
- Technology Used: PeopleSoft AP, AR, BI, EXP, INV, PO 9.0, Oracle UPK 3.5.1

IBM/Government of the Northwest Territories (Government) Yellowknife, Canada

5/2009-10/2009

Senior Training Developer

As an independent consultant through DLC, Inc., accomplishments include:

- Created and managed work plans and mentored fellow team members.
- Successfully completed 200 simulations.
- Managed training environment data population efforts and resolved errors encountered during classrooms.
- Served as trainers help desk to document and resolve issues encountered during course delivery.
- Worked on post go-live help desk and mentored junior, help desk, staff members.
- Technology Used: PeopleSoft AR, BI, EXP, GL, PC, Oracle UPK. 3.5.0.

Accenture/Exelon Corp. (Utility) Chicago, IL

10/2008-1/2009

Senior Training Developer

As an independent consultant through M9 Solutions, accomplishments include:

- Successfully completed 80 simulations.
- Performed style editing to ensure consistency among training developers.
- Technology Used: PeopleSoft PC, CON 8.9, Oracle UPK 3.1.5

**Premier Consulting/EURO RSCG (Advertising) New York, NY
Senior Training Developer**

10/2007-7/2008

As an independent consultant through Premier Consulting, accomplishments include:

- Worked on post-production support team to analyze help desk tickets to design a custom, web-based repository of frequently asked questions.
- Successfully created 500 FAQs consisting of answers to commonly asked questions and issues, PeopleSoft navigation, and links for applicable training documentation.
- Maintained custom frequently asked questions web page, using html, to add, delete and modify content.
- Worked with functional leads to streamline processes, identify and create new training, business process and/or procedural documentation.
- Created and executed test scripts
- Answered end-user help desk calls/tickets for the financials modules.
- Technology Used: PeopleSoft AM, AR, GL, PO, PC, Time & Expense 8.8

**Inrange Consulting/State of Indiana (Government) Indianapolis, IN
Training Developer**

8/2007-10/2007

As an independent consultant through GDII, accomplishments include:

- Developed training documentation for the Attorney General, Secretary of State, Department of Education, and Elections Division agencies using Microsoft Word.
- Conducted End User Training for all modules (listed below).
- Technology Used: AP, AM, AR, ePro, GL, PC 8.9

**Accenture/State of Ohio (Government) Columbus, OH
Financials Training Lead/Training Security Administrator**

9/2006-7/2007

Accomplishments include:

- Led ten member training team for a multi-release financials training initiative for the State of Ohio's \$158 million PeopleSoft HCM & Financials implementation impacting 10,000 end users.
- Re-engineered training development business processes, re-engineered courseware templates resulting in reduction of 50 work hours per module.
- Technology Used: AP, AR, GL, PO, Security Administration 8.8, Project Server.

**EDS/Avery Dennison Project Dragon (Manufacturing) telecommute
Training Developer**

4/2006-10/2006

As an independent consultant through Whitaker Consulting, accomplishments included:

- Worked with EDS Consulting on the Avery Dennison global implementation of PeopleSoft 8.9 implementation in Asia Pacific business units and upgrade from 7.5 for North America and European business units.
- Tested, populated, and performed security administration on training environment.
- Conducted end user and train-the-trainer sessions for Asia Pacific business units (modules below).
- Technology Used: AP, AR, GL, Security Administration 8.9, Citrix

**Maximus/State of New Mexico (Government) Santa Fe, NM
Senior Training Developer**

1/2006-3/2006

As an independent consultant through TransAmerica Training, accomplishments included:

- Successfully completed 40 simulations and conducted train-the-trainer sessions for T&L.
- Technology Used: PeopleSoft Time & Labor 8.9, PeopleSoft UPK.

**Maximus/Miami-Dade County (Government) Miami, FL
Assistant Team Lead/Training Security Administrator**

8/2005-12/2005

As an independent consultant through TransAmerica Training, accomplishments included:

- Performed security administration on the training environment.
- Functioned as assistant training lead for 6-member training team
- Technology Used: PeopleSoft AM, EXP, KK, and Security Administration 8.8, Oracle UPK.

Deloitte/Countrywide Home Loans (Financial) Pasadena, CA

4/2005-7/2005

Training Developer

As an independent contractor, accomplishments included:

- Successfully completed 30 simulations and a classroom PowerPoint presentation.
- Technology Used: PeopleSoft Payroll 8.8, PeopleSoft UPK,

Empire Today LLC (Home Improvement/Furnishing) Northlake, IL.

6/2004-4/2005

Systems Trainer/Business Analyst

Accomplishments included:

- Developed and delivered training specific to corporate call center operations and business units in the national implementation of Siebel 7.5 CRM.
- Documentation of current and future business process flows to identify deficiencies, process/system gaps and business requirements.
- Functioning as liaison to three business units and call center departments entailing issue resolution, monitoring ability to perform job in Siebel, developing process improvement plan to assist the business unit in meeting company standards, determining and meeting ongoing training needs.
- Working on process improvement (pi) project to restructure the organization to handle customer complaints more effectively and efficiently. 3
- Redesigning system configuration to include creating new business processes, system tables and creating smart scripts for documenting service requests
- Technology Used: Siebel, Query CRM 7.5

Wright Group/McGraw-Hill (Education) Chicago, IL.

8/2003-5/2004

INSIGHT Professional Development Interim Workshop Coordinator

Temporary assignment through Manpower Professional Services, accomplishment included:

- Ran INSIGHT operations, a \$1.2 million revenue professional staff development provider.
- Transitioned INSIGHT operations from Bothell, Washington to Chicago, defined, re-engineered, and documented business processes.
- Defined, re-engineered, and documented business processes for sister division Everyday Mathematics and integrating both divisions.
- Determined professional development needs, sold professional development workshops, created contracts, contracting with third-party consultant to staff the workshop.
- Monitored inventory and managing workshop logistics to include invoicing, accounts receivable and rectifying discrepancies.

Caretaker for elderly relative Chicago, IL.

(5/2001-5/2003)

Tribune Company, Project XXI (Publishing) Chicago, IL.

(6/1998-2001)

Training Implementation Lead/Training Security Administrator

- Trained and mentored 7-member team.
- Maintained the registration database and conducted end user training (modules below) for 60 business units nationwide.
- Provided onsite support at system go-live and performed security administration for training environments.
- Technology Used: PeopleSoft AM, AP, Ben Admin, HRMS, GL, PAY, PO, Query, Security Admin 7.5

EDUCATION AND CERTIFICATIONS:

Bachelor of Science, Computer Engineering, University of Chicago, IL

TECHNICAL SKILLS:

CRM: Siebel 7.5

PeopleSoft:

Financials/Supply Chain: Accounts Payable (8.8, 8.9, 9.0, 9.1), Accounts Receivables (8.9, 9.0), Asset Management (7.5, 8.8, 9.1), Billing (9.0, 9.1), Commitment Control (8.8, 9.0, 9.1), Contracts (8.9, 9.1), eProcurement (8.8), Expenses (8.8, 9.0), General Ledger (7.5, 8.8, 8.9, 9.0, 9.1), Inventory (9.0, 9.1), Project Costing (8.8, 8.9, 9.0), Purchasing (7.5, 8.8, 8.9, 9.0, 9.1), Security Administration (7.5, 8.8, 8.9)

HCM: Benefits Administration (7.0), Human Resources (7.0), Payroll (7.0, 8.8), Query/Crystal (7.0, 7.5), Time & Labor (8.9)

EPM: Planning and Budgeting (9.1)

Microsoft: Access, Excel, Outlook, PowerPoint, Visio, Word, Citrix, online project management tools.

Oracle: Accounts Payable (12i), iProcurement (12i), Purchasing (12i), iExpense (12i), iSupplier (12i), and User Productivity Kit (3.1.5, 3.5.0, 3.5.1, 3.6.1)

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A.9 Angela Williams – PeopleSoft Security Specialist

SUMMARY:

Over sixteen (16) years of experience within IT and the last 8 years have been working with PeopleSoft HRMS and Financials systems. Angela's expertise lies in the areas of PeopleSoft Security, PeopleSoft Admin, WebLogic, WebSphere, Kronos v2c, and in PeopleSoft Suite of Products of:

- HRMS (HR, Payroll, Global Payroll, Benefits, Student Administration, Self - Service, Talent Acquisition Manager, Enterprise Learning, eBenefits, eCompensation, eRecruit, ePerformance, and Time and Labor)
- Financials (Accounts Payable, Accounts Receivable, Asset Management, General Ledger, Billing, eBill, Workflow, Purchasing, Project Costing, Inventory, Commitment Control and CRM) from versions 7.5 to 9.0

As PeopleSoft Lead Implementation Security Architect at United Rentals, Connecticut, has provided best practices followed in PeopleSoft Security related client requirements, and in designing customizations, conversions and interfaces, business process/best practices knowledge, business analysis including business process modeling, package implementation/life cycle methodology.

Angela, as a Senior PeopleSoft Administrator and Security Lead with Crestone International, has worked in a higher education environment. As a PeopleSoft Security Lead, Angela setup users in system by role, permission lists, security sets, query access groups, department security tree, row level security, LDAP, Single Signon, and Active Directory integrations for HR, Payroll, Benefits, Manager Self Service, and Employee Self Service. This is exemplified with Angela working at:

1. **NEU (Northeastern University)** upgrading Student Administration from v 7.6 to 8.9. Setup Security user profiles for 16,000 users for Campus Community, Student Recruiting, Student Admissions, Records and Enrollment, Financial Aid, Student Financials, Academic Advising, and Records and Enrollment. Implemented PeopleSoft CRM v8.8, Tools Rel. 8.44.06.
2. **KCTCS (Kentucky Community Technical College)**, Angela implemented Student Administration for 9.0. Setup Security user profiles for 13,300 users for Campus Community, Student Recruiting, Student Admissions, Records and Enrollment, Financial Aid, Student Financials, Academic Advising, and Records and Enrollment.

Angela, as a PeopleSoft Student Administration Security Consultant, has conducted Security Assessment of current state of 8.0 environment and provided recommendations on changes that would need to be made to system for 9.0 upgrade. Angela has assisted with security changes/recommendations for 11 institutions, and assisted users with testing of Student Financial Aid, Student Records, Loan Process, Equation Engine, and Campus Solutions.

Angela, as PeopleSoft Lead Implementation Security Architect at United Rentals, Connecticut, defined client requirements, designing customizations, conversions and interfaces, business process/best practices knowledge, business analysis including business process modeling, package implementation/life cycle methodology, and produce Technical documentation to support all phases of the development life cycle, so that it may be interpreted, maintained and enhanced. Angela has assisted in mentoring program resources in Security Architecture and Administration, hands on experience with eBus Application Designer and Data Mover. Angela has in-depth understanding of PeopleSoft delivered security functionality (User Profiles, Roles, Permission Lists, Portal Security Sync, security sets, etc.) and has the ability to support and customize PeopleSoft Security functionality.

Angela, all as a PeopleSoft Security Specialist at Peak Performance Tech (handling higher education clients), has delivered the required approach, designed and executed row-level security access, dynamic rules in the new environment handling redefined client roles & permissions for both global and domestic clients, setup roles, permissions, department security, user IDs, and query security. Angela has led the security efforts and utilized the tools and methodology as per the industry standard best practices, for Time and Labor, HR/, Position

Management, Benefits/ Ben Admin, Recruit, TAM, and North American Payroll for 9.x Setup security for PeopleSoft Financials 9.0 and 9.1 for modules: GL, AR, Billing, AP, AM, Procurement, and Supply Chain.

Angela, as a PeopleSoft Lead Implementation Security Analyst at WR Berkley, Iowa, in a 9.0 re-implementation engagement, extensively participated in assessing the current state roles and permissions lists of the existing system, created, and documented the process for creating new roles and permission lists that were utilized in the re-implemented system. Additionally, setup roles, permissions, department security, user IDs, and query security.

Angela, as a Project Manager at Peak Performance Tech between 03/2008 and 05/2009, doubled as a PeopleSoft HR Techno Consultant and PeopleSoft Security Consultant. As a Techno Consultant, conducted Fit-Gap sessions for PeopleSoft HR v9.0, create business process guides, process flow diagrams using MS VISIO; create analysis documents for each area; he built and trained the team in preparing the functional specs for Time and Labor, HR/, Position Management, Benefits/ Ben Admin, Recruit, TAM, and North American Payroll. As a PeopleSoft Security Consultant, setup security, permission list, row level security, query security, users, and workflow processes and designed security for clients based on specifications. As a Project Manager, Angela managed onshore and offshore team, to accommodate India Time Zone, schedule status meetings, resolve outstanding issues, prepare project plans to meet client needs, and conduct weekly meetings with clients, as well as, consultant staff to ensure all issues are resolved.

To summarize, Angela has PeopleSoft Security expertise, PeopleSoft HCM and FSCM Modules expertise, and configuring these modules from the Security perspective, Project Management experience in managing teams working onsite and offshore, thus ensuring the utilization of team members, phase-in and phase-out processes. As an accomplished PeopleSoft Security Specialist, Angela is aware of the documentation and knowledge transfer. Angela ensures to work with Boise assigned Security Specialist from the start thus ensuring the transfer of information happens scientifically as the work progresses, and documenting the entire process as it happens.

PROFESSIONAL EXPERIENCE:

Advance Digital Systems, Fairfax, VA **03/2012 - Present**

PeopleSoft Security Consultant **03/12 – Present**

Peak Performance Tech / In House Lab for Higher Ed clients - Atlanta

- Setup and design security designs.
- Implement and upgrade security for both global and domestic clients.
- Setup roles, permissions, department security, user IDs, and query security.
- Lead security efforts for Time and Labor, HR/, Position Management, Benefits/ Ben Admin, Recruit, TAM, and North American Payroll for 9.x Setup security for PeopleSoft Financials 9.0 and 9.1 for modules: GL, AR, Billing, AP, AM, Procurement, and Supply Chain
- Setup Security, permission list, row level security, query security, users, and workflow processes.
- Design security for clients based on specifications.
- Create SQL scripts to convert data from one environment to another.
- Use SQL query tool to command and execute.
- Setup document types, templates, and sections
- Performed upgrade and system configurations for HR v9.1,
- Performed mass data load into tables
- Customized and create SQRs, app engine processes, and Component Interfaces.
- Use PeopleCode to make code changes.

PeopleSoft Lead Implementation Security Architect **09/10 – 03/12**
WR Berkley / Iowa

- Setup security for PeopleSoft Financials 9.0 Re-Implementation for modules: GL, AR, Billing, AP, and AM
- Setup Dynamic Rules
- Setup pagelets, contents, website branding, and Portal Security design.
- Conduct Portal Security design sessions with client to prepare fit/gap analysis.
- Assign contents to portal for correct security setup.
- Setup users, user preferences, permissions lists, roles, reporting security, query security, and table structure within Internal Controls.
- Setup excel to CI in order to upload users in PeopleSoft
- Trained users on PeopleSoft Security and PeopleSoft Portal

**PeopleSoft Lead Implementation Security Architect
United Rentals / Connecticut**

06/09 - 05/10

- Setup security for PeopleSoft Financials 9.0 Implementation for modules: GL, AR, Billing, AP, eProcurement w/workflow, T&E w/workflow, KK, Contracts, Billing, eSettlement, P2P, Asset Management, Purchasing, Inventory, and Projects
- Setup Dynamic Rules
- Setup pagelets, contents, website branding, and Portal Security design
- Conduct Portal Security design sessions with client to prepare fit/gap analysis
- Assign contents to portal for correct security setup
- Setup users, permissions lists, roles, reporting security, query security, and table structure within Internal Controls
- Setup excel to CI in order to upload users in PeopleSoft
- Trained users on PeopleSoft Security and PeopleSoft Portal
- Create portal development procedures for knowledge transfer
- Design portal dbs via the internet
- Create db scheme designs using web services and java scripts
- Perform day-to-day system administration activities for enterprise information security solutions
- Perform security design sessions with functional leads/manager to understand business processes/mapping requirements for user roles/responsibilities
- Create SQL scripts and data mover scripts to ensure security tables were migrated from one environment to another
- Setup and configure Enterprise Portal for users. Setup and manage Portal Content, setup web solutions, configure and use resource finder. Setup user and portal security, maintain Portal Registries, setup content management, publish content, configure the search engine, create new sites, configure nodes and content and setup and modify homepage tabs
- Create projects via App Designer to migrate security from one environment to another
- Perform self-audits to ensure all security data was uploaded
- Create security design matrix for approval of configuration setup
- Prepared test scripts/test plans for end users
- Build dynamics roles
- Setup Integration Broker and App Engines processes
- Provide weekly status report to client

**Project Manager / PeopleSoft HR Techno Consultant/ Security Consultant
Peak Performance Tech / In House Lab - Atlanta**

03/08 – 05/09

- Conduct Fit-Gap sessions for PeopleSoft HR v9.0; create business process guides, process flow diagrams using MS VISIO; create analysis documents for each area.
- Setup Security, permission list, row level security, query security, users, and workflow processes.

- Design security for clients based on specifications.
- Schedule status meetings, resolve outstanding issues, prepare project plans to meet client needs.
- PeopleSoft HR Team Lead; provided full life-cycle systems development and production support. Lead planning, analysis, development, and testing activities during PeopleSoft upgrades and provide tools, standards, templates, code reviews, and methodology
- Provided hands-on support of customizations, interfaces, data issues, and other technical issues; lead technical design, development, testing, and documentation for projects
- Setup and Configure Single Signon and enable Active Directory in order that users can log into the network without having to sign into each application separately. The authentication updates both PS and AD upon the user logging into the application.
- Performed upgrade and system configurations for HR v9.0, Time and Labor, Manager Self Service, Employee Service, eBenefits, eCompensation, eRecruit, ePay, ePerformance, Position Management, Recruiting, Benefits, Ben Admin, Workflow, Talent Acquisition Manager, Candidate Gateway, Career Planning, Succession Planning, Competencies, and North American Payroll.
- Configure and Integrate Integration Broker.
- Developed solutions for / with LDAP, ADAM, SSO, Single Sign On, Enterprise Access Control, authentication and authorization
- Automate provisioning and de-provisioning.
- Assisted users with testing of following modules: Time and Labor, HR, Manager Self Service, Employee Service, eBenefits, eCompensation, eRecruiting, ePay, ePerformance, Workflow, Talent Acquisition Manager, Candidate Gateway, Career Planning, Succession Planning, Benefits, Ben Admin, and Global Payroll.

Project Manager / PeopleSoft Lead HR Security Architect 12/07 – 03/08
Acsys, Inc. / Oakwood Healthcare (Michigan)

PeopleSoft Student Administration Security Consultant 06/07 – 08/07
CrossWay Group / UND

PeopleSoft Lead Administrator HCM/ELM Security Consultant 02/07 – 12/07
Vangent, Inc. (Arlington, VA)

PeopleSoft Security Consultant 07/06 – 02/07
Southern Utes Indian Tribe (Ignacio, CO)

PeopleSoft Fast Security PeopleCode for v7.5 03/06 – 06/06
Margin 10 Consulting Group / Telepex (Natchez, MS)
PeopleSoft Lead Security Consultant HCM 8.9 Implementation 07/05 – 02/06
Crane Co. (Seattle, WA)

PeopleSoft Lead Security Consultant HCM 8.0 to 8.8 – Upgrade 02/05 – 05/05
Milacron (Cincinnati, OH)

PeopleSoft Lead Security Consultant HCM 8.3 to 8.9 – Upgrade 02/05 – 06/05
Providian (California)

SA/HCM/FIN/ Senior PeopleSoft Administrator/ Global PeopleSoft HRMS Security Lead and Financials Team Lead/ SOX Consultant 06/04 – 05/06
Crestone International (Alpharetta, GA)
SECURITY PROJECTS

PeopleSoft Security/Business Analyst Consultant **1/04 – 5/04**
Skybridge Global Consulting / Recall Information Systems (Norcross, GA)

PeopleSoft Security Analyst (HRMS, Time and Labor, Financials, Kronos, JP Morgan) **9/98 – 11/03**
Turner Broadcasting Systems, Atlanta, GA

Sr. Staff Accountant/Analyst **1/96 – 9/98**
Medaphis Corporation, Atlanta, GA

EDUCATION AND CERTIFICATIONS:

Business Administration - GPA-3.4/4.0 - Accounting,
Mississippi Valley State University, May 1995

TECHNICAL SKILLS:

Software	Kronos v2c, Remedy, HEAT, Ftp, PC Anywhere, Terminal Servers, Unix, NT, Windows 2000, NT, Unix, PeopleSoft Security, PeopleSoft Financials 7.5 - 8.9, PeopleSoft HR/Payroll 7.5 – 9.0, Time and Labor 8.9, SQRs, Data Migration, Data Mover, SQL, SQR, Application Engine, Application Designer, Workflow, Fixed Assets Management System, Certifications in PeopleTools, PeopleSoft HRMS and Financials, PeopleSoft Directory Interface, LDAP, Single Signon, and Global Payroll
Databases	Oracle, SQL Server