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UNIVERSITY OF CENTRAL FLORIDA INVITATION TO NEGOTIATE (ITN) NUMBER 1325JCSA FOR ERP Consulting Services for Implementation and Upgrades for PeopleSoft Applications, PeopleTools and Oracle Software and Hardware

Due Date: June 3, 2014; 2:00 p.m.

Cali Jones
Purchasing Department
12479 Research Parkway Orlando, FL 32826-3248 cali.jones@ucf.edu
PH: 407-823-5889
Fax: 407-823-5551

Terms & Conditions Statement

Highstreet IT Solutions, LLC (Highstreet) presents its proposal as set forth herein to the Request for Proposal for PeopleSoft Financials, Supply Chain Management, and Hyperion Optimization (the "RFP") issued by the University of Missouri ("University"). Neither the contents of Highstreet's proposal nor any omissions from Highstreet's proposal shall give rise to a binding obligation between the parties. Highstreet's proposal does not constitute acceptance of any terms or conditions contained in the RFP. Highstreet desires the opportunity to negotiate a contract, including a mutually agreed Statement of Work, if Highstreet is awarded this RFP and proposes that all of the terms and conditions of the RFP and Highstreet's proposal are subject to negotiation until all such terms are mutually agreed to and incorporated into a final contract.

Document Validity

The contents of this document are valid for 120 days from submittal date. The estimate for the pricing of the services in this document is valid for 120 days from the submittal date. This is not a binding proposal. Any pricing in this document does not include any local taxes.

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

Page 1 of 32 Pages	OFFERS WILL BE OPENED June 3, 2014 and may not be withdrawn within days after such date and time.	ITN NO: 1325JCSA
UNIVERSITY MAILING DATE: **May 1, 2014**	ITN TITLE: **ERP Consulting Services for Implementation and Upgrades for PeopleSoft Applications, PeopleTools and Oracle Software and Hardware**	
FEDERAL EMPLOYER IDENTIFICATION NUMBER OR S.S. NUMBER : 46-2499428		

VENDOR NAME Highstreet IT Solutions, LLC		REASON FOR NO OFFER NA
VENDOR MAILING ADDRESS 8480 E. Orchard Road, Ste. 6200		
CITY - STATE - ZIP CODE Greenwood Village, CO 80111		POSTING OF PROPOSAL TABULATIONS
AREA CODE 303	TELEPHONE NO. 802-5200	Proposal tabulations with intended award(s) will be posted for review by interested parties at the Purchasing Department, our solicitation web page and the State of Florida's Vendor Bid System and will remain posted for a period of 72 hours. Failure to file a protest within the time prescribed in UCF Regulation 7.130(5) at http://regulations.ucf.edu/chapter7/index.html shall constitute a waiver of proceedings under that regulation.
	TOLL FREE NO.	
303	FAX NO. 802-5201	

Government Classifications
Check all applicable

- ☐ African American
- ☐ Asian-Hawaiian
- ☐ Hispanic
- ☐ Native American
- ☐ Non-Profit Organization
- ☐ Small Business Federal
- ☐ American Women
- ☐ Government Agency
- ☐ MBE Federal
- ☐ Non-Minority
- ☐ Pride
- ☐ Small Business State

GENERAL CONDITIONS

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

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

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.

Lisa A. Moore
AUTHORIZED SIGNATURE (MANUAL)

Lisa Moore, Vice President
AUTHORIZED SIGNATURE (TYPED), TITLE

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

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.

June 3, 2013

Cali Jones
Purchasing Department
12479 Research Parkway Orlando, FL 32826-3248 cali.jones@ucf.edu
PH: 407-823-5889
Fax: 407-823-5551

Ms. Jones:

On behalf of the Highstreet IT Solutions team, thank you for the opportunity to propose the following proposal for the University of Central Florida's ERP Consulting Services for Implementation and Upgrades for PeopleSoft Applications, PeopleTools and Oracle Software and Hardware projects. This proposal will provide you with the information you requested in the UCF Invitation to Negotiate.

Based on the information you provided Highstreet regarding the University of Central Florida's needs, we are confident that our company can provide experienced and seasoned resources who can assist with all of the university's PeopleSoft and Oracle needs. With a history rooted solely in PeopleSoft, our team is highly qualified to aid your university in making the most of your PeopleSoft system.

The Highstreet team has been working with PeopleSoft for more than 17 years. Highstreet's business philosophy is based on a close working relationship with our customers. The success of this philosophy and quality of our services are proven by the high satisfaction rates of our clients. Our employees exemplify this philosophy to the fullest, leveraging their collective experience to empower our clients with the steadfast support they have come to expect from Highstreet IT.

We value the relationship that we have begun to establish and look forward to enhancing our relationship through this ITN process. I welcome any further questions that you or your team may have. Please feel free to contact me at any time via email or phone.

Kind Regards,

Meg Phillips
Sales Executive
Highstreet IT Solutions, LLC
222 W. Highland Dr.
Lakeland, FL 33813
Email: meg.phillips@highstreetit.com
Work: 863.669.1100 ext:313
Mobile: 863.670.6163

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3. Please provide a list of client accounts lost through early termination or non-renewal over the past five (5) years. Include contact name, phone number, email address and length of service at each account, and reason for loss. 9

4. The Proposer shall provide a chart of the company's organization and a description of its corporate structure and chain of ownership of company to ultimate parent corporation, and all subsidiaries. 10

5. Provide the number of years' experience in providing services as described in section 1.1. 10

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1. List the total number of employees, include job titles and experience of individual(s) who would be available to the UCF account; please include resume(s). 11

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2. Proposers addressing the systems administrator functions, the database administrator functions and application functions as described in section 1.1 must provide a list of current or recent clients and projects explaining integrations with third party application and the project scope. 71

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A. Experience & Qualifications

Experience And Qualifications in any of the following PeopleSoft applications: Campus Solutions, Human Capital Management, Financials, CRM, Interaction Hub, Mobile, Database Administration, Systems Administration.

1. Please provide an overview and history of your company, and experience in providing consulting and advisory services similar in scope to those requested in section 1.1.

Response:

Highstreet IT Solutions was founded with the goal of providing the highest quality ERP implementation services in our industry. Our leadership team has over 20 years' experience building successful, vertical–focused consulting practices which have served 175 colleges and universities (public and private).

Our management team has worked together for over 15 years, with Oracle relationships dating back to the founding of PeopleSoft. This long-term Oracle partnership has been strategic, resulting in involvement in industry specific product development of the Oracle suite of products. Highstreet leadership and consulting teams are recognized throughout the Higher Education industry for Oracle Consulting Solutions.

Last year, Highstreet IT Solutions expanded its Oracle offerings and consulting headcount via two strategic acquisitions of Enterprise Solutions Group (ESG), headquartered in Fairfax, Virginia and Moore Integrated Solutions (MIS), headquartered in Lakeland, FL. Highstreet, ESG and MIS are dedicated Oracle|PeopleSoft consulting companies with a diversified mix of Public Sector, Higher Education, Healthcare and Commercial clients.

Enterprise Solutions Group was founded in 1998 and has been 100% focused on Oracle/PeopleSoft consulting services since its inception. ESG Leadership has long standing ties to PeopleSoft dating back to its founding in the early 90's. Moore Integrated Solutions (MIS, Inc.) was founded in 1996 and also worked exclusively with PeopleSoft consulting services. MIS, Inc. maintained an industry focus in Public Sector and Higher Education since its inception.

With strong ties to Higher Education in the state of Florida and a local office located just an hour drive from the University of Central Florida, Highstreet is uniquely qualified to provide quality local PeopleSoft and Oracle Products Consulting to the university that specialize in Higher Education. The Highstreet team has completed over 300 PeopleSoft and Oracle Solutions implementations and upgrades including PeopleSoft Campus Solutions, Human Capital Management, Financials and Supply Chain Management, CRM, Interaction Hub/Portal, Academic Advisement, Oracle analytical tools such as Hyperion and OBIEE as well as PeopleTools versions up to an including version 8.53.

The combined Highstreet portfolio uniquely positions us in the Oracle Partner ecosystem. While not as large as the Big 3 consulting firms, our specific industry focus supplemented with our long history of successfully delivering on PeopleSoft products enables us to provide the University of Central Florida with the best value. Value is not only derived from price but from ability to deliver at that price.

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

Response:

Client Name:	The University of Texas System
Contact Name and Title:	Dawn Stoyanoff Ph.D
Address:	220 East Loop 820, Fort Worth, TX 76112
Phone Number:	817.584.8231
Email Address:	dstoyanoff@utsystem.edu
Length of Service:	2 years and current

Client Name:	Northern Arizona University
Contact Name and Title:	Lanita Collette, Information Security Officer
Address:	P.O. Box 4103, Flagstaff, AZ 86011
Phone Number:	928.523.8438
Email Address:	Lanita.collette@nau.edu
Length of Service:	6 years and current

Client Name:	The University of Kansas
Contact Name and Title:	Bob Lim; CIO
Address:	1001 Sunnyside Ave. Lawrence, KS 66045
Phone Number:	785.864.4999
Email Address:	blim@ku.edu
Length of Service:	1 year and 6 months and current

Client Name:	Boise State University
Contact Name and Title:	Brian Bolt, Director- Project Management Office
Address:	1910 University Dr. Boise, ID 83725
Phone Number:	208.426.6835
Email Address:	brianbolt@boisestate.edu
Length of Service:	1 year and current

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

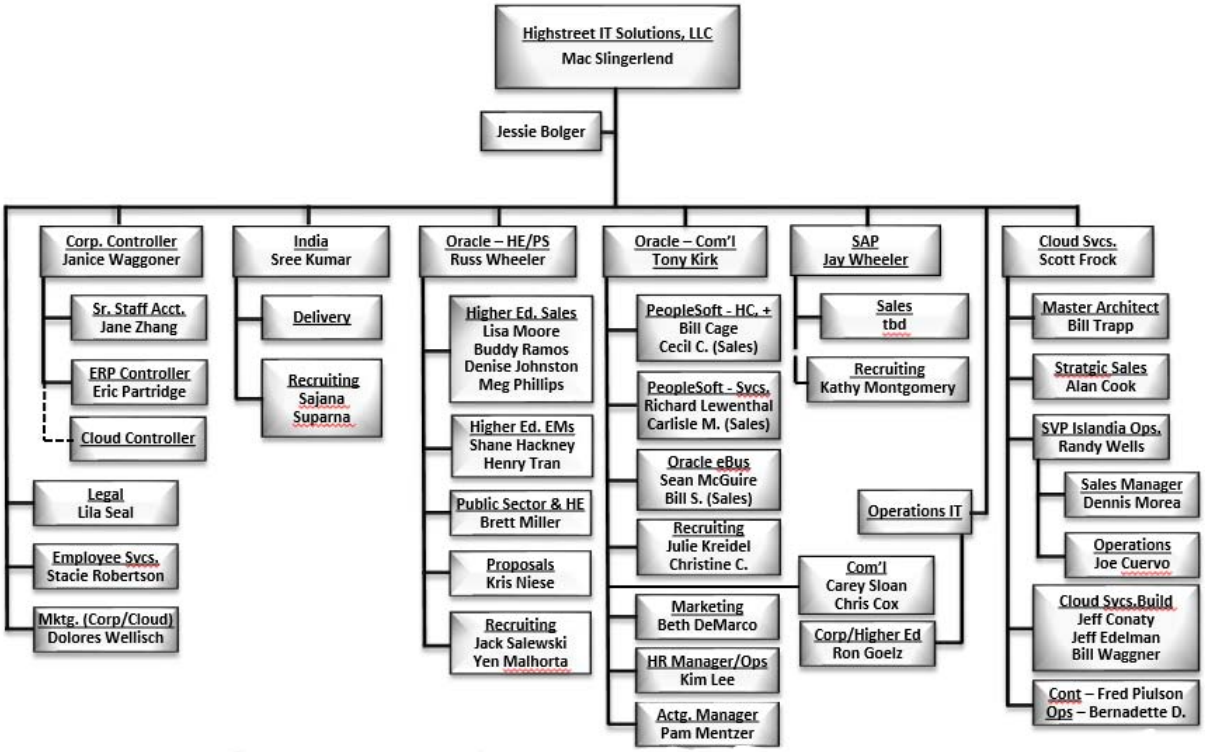
Response:

Highstreet IT Solutions has not lost any vendor list client accounts through early termination or non-renewal in the past 5 years.

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

Response:

Below is a company organizational chart for Highstreet IT Solutions. Highstreet is privately owned by Mac Slingerlend.



5. Provide the number of years' experience in providing services as described in section 1.1.

Response:

For 17 years we have provided PeopleSoft implementation and consulting services to the higher education market. Today many of our clients are colleges and universities including Berkeley College , the University of Missouri System, The University of Florida, The University of Texas System and NYU Langone Medical Center to name but a few.

We have also been providing hosting for PeopleSoft and other Oracle technologies in the higher education market for the past 12 years – even longer than Oracle has been providing those services. The PeopleSoft Academy was founded in our data center in 1998 and since that time we have provided hosted PeopleSoft environments to over 100 customers in 5 countries, making Highstreet the #1 PeopleSoft hosting provider to higher education.

B. Services Offered

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

Response:

Highstreet has over 200 senior and principal level consultants who are available for UCF's upcoming PeopleSoft projects. Below is a sampling of the consultants that are available to UCF for each of the skillsets that Highstreet can provide. Highstreet's consultants average over 17 years of experience working in Higher Education and more than 13 years working with PeopleSoft in their specific area of expertise. With Highstreet's large contingency of local central Florida based consultants working from our Lakeland, FL offices combined with the depth of experience and quality of resources, Highstreet is poised to be a valuable service implementer and consulting partner to your university. We have included resumes for each of the employees in the chart below. Please see Attachment D – Resumes. Additional resumes for additional consultants and skillsets can be provided upon request.

Role/Skill/Position	Resource name	Actual Yrs of Experience in skill set
PeopleSoft Project Management		
	Tim G.	16
	Karen B.	10
	Robbie D.	15
PeopleSoft CS Functional		
	Jessica E.	10
	Peter H.	10
	Robbie D.	15
	Tina S.	12
PeopleSoft HCM Functional		
	Pam B.	19
	Daniel L.	16
	Paula S.	13
	John B.	11
PeopleSoft FMS Functional		
	John E.	15.5
	Thomas M.	26
PeopleSoft Grants Suite Functional		
	Dana D.	15

Role/Skill/Position	Resource name	Actual Yrs of Experience in skill set
	Thomas M.	26
PeopleSoft CS Technical		
	Stephen P.	9
	Tim G.	16
	Jesus C.	14
	Pradeep R.	12
	Wei X.	24
	Kurt A	17
PeopleSoft HCM Technical		
	John B.	11
	Tim G.	16
	Stephen P.	9
	Kurt A.	17
	Joe C.	15
	David G.	11
PeopleSoft FMS Technical		
	Tim G.	16
	Kurt A.	5
	Conrad S.	10
	Joe C.	15
PeopleSoft Technical Trainer		
	Tim G.	16
	Pradeep R.	12
	Stephen P.	9
PeopleSoft Functional Trainer		
	Paula S.	13
	Jessica E.	10
	Pam B.	19
	Robbie D.	15
	Karen B.	10
PeopleSoft System Administration (Installation, Upgrade & Management)		
	Stephen P.	9

Role/Skill/Position	Resource name	Actual Yrs of Experience in skill set
	Tim G.	16
Oracle Database Administration (PeopleSoft Experience)		
	Carol D.	5
	Tim G.	16
	Stephen P.	9
Redhat Server Administration (PeopleSoft Environments)		
	Tim G.	16
	Stephen P.	9
PeopleSoft Security		
	Conrad S.	10
	Karen B.	10
	Tim G.	16
PeopleSoft UPK Development		
	Karen B.	10
	Robert E.	16
	Paula S.	13
	Jessica E.	10
PeopleSoft End User Software Training		
	Jessica E.	10
	Paula S.	13
	Stephen P.	9
	Pam B.	19
	Tim G.	16
	Robbie D.	15
Portal		
	Chris L.	8
	Tracey G.	10
	Tim G.	16

2. Clearly identify the skill sets your staff is capable of providing, and clearly indicate if subcontractors or sub-consultants will be used.

Response:

Below are the skill sets that Highstreet can provide to UCF. We have attached a list of highly qualified senior and principal level consultants for each of these skillsets above in question 1 of this section. This list includes a sampling of the Highstreet employees that are available to UCF. Additionally, Highstreet can provide sub-consultants if the timing of the placement or skillset requirements may be a better fit for a sub-consultant. As with all of our Highstreet employees, Highstreet expects the highest quality services, work ethic and professionalism from all of our sub-consultants.

1. PeopleSoft Project Management
2. PeopleSoft Campus Solutions Functional
3. PeopleSoft Human Capital Management Functional
4. PeopleSoft Financial Management Suite Functional
5. PeopleSoft Grants Suite Functional
6. PeopleSoft Campus Solutions Technical
7. PeopleSoft Human Capital Management Technical
8. PeopleSoft Financial Management Suite Technical
9. PeopleSoft Technical Trainer
10. PeopleSoft Functional Trainer
11. Oracle Database Administration
12. Redhat Server Administration
13. PeopleSoft Security
14. PeopleSoft UPK Development
15. PeopleSoft End-User Software Training
16. PeopleSoft Interaction Hub (Portal)

C. Consulting Scope and Cost to University

1. Demonstrate an understanding of the services the university requires under this contract.

Response:

The Highstreet IT Solutions' team has more than 17 years of PeopleSoft experience. Throughout the years, we have established proven strengths and expertise in the full PeopleSoft suite including Human Capital Management, Financials, Campus Solutions and all modules within each of those pillars. Additionally, our principal and senior level consultants have expertise working with CRM, PeopleSoft Interaction Hub, the latest release of PeopleTools including everything back through version 8.52. Highstreet also has expert technical resources who specialize in upgrades, performance tuning, configurations and security specifically regarding system administration and database administration. Highstreet's resources have experience working in Campus Solutions and Human Capital Management split environments as well as performing the database split and Human Capital Management upgrade. Some of our resources also have experience with PeopleSoft version 9.2 which may be helpful to your university in the future.

2. Explain the methodology the proposer will employ to fulfill the requirements discussed in section 1.1 while maintaining project scope and cost.

Response:

Highstreet prides itself in delivering quality consulting at competitive prices with extremely minimal change requests. We work with our clients to help them attain reasonable goals and expectations up front so that they can budget for what is truly necessary and have their project completed within that budget. We are happy to provide references to speak to our history of delivering successful projects under budget.

Below is the Highstreet Ascend Methodology for implementations, followed by the Highstreet Upgrade Methodology.

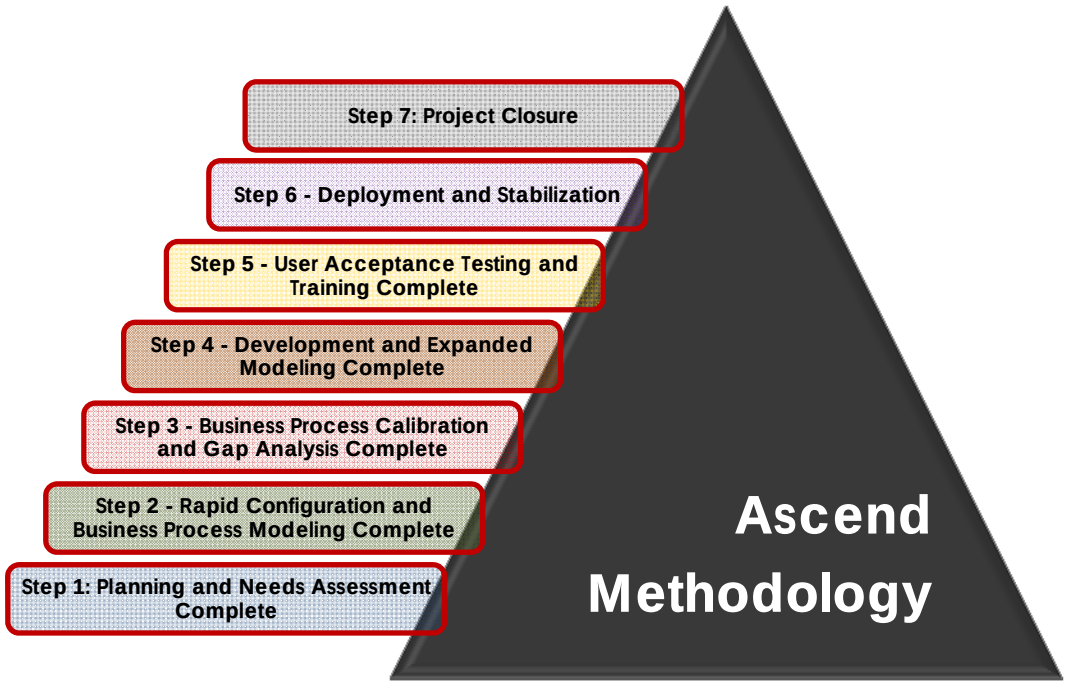
Highstreet's Ascend Methodology Overview

The following detail outlines Highstreet's approach to implementation services. Many years of experience in higher education have resulted in a methodology that consistently delivers the most successful, cost-effective Oracle|PeopleSoft implementations in the industry. Highstreet's approach to implementations stands apart from those of other implementation partners. Many have built project management frameworks and attempted to make them fit the implementation approach; others have tried to do the same with Training and Change Management, if such methodology exists. At Highstreet, we reinvented the way Oracle|PeopleSoft is implemented, to ensure that the project management approach and training and change management approach are the drivers for what is critical to project success, not afterthoughts. Highstreet's approach will get you into your production environment more efficiently–whether in the cloud or your institution's data center—while minimizing the impact on your day-to-day business.

Highstreet's Ascend methodology is founded on a sound, classical system implementation model, which has been tuned for speed, flexibility, control and quality. This promotes consistency and familiarity of process to facilitate superior results.

The methodology is based on several critical concepts:

- Solid planning to establish clear roles, responsibilities and project milestones;
- Functional user participation in all phases of the process;
- Continual knowledge transfer resulting in client self-sufficiency;
- Emphasis on delivered functionality and reduced modifications; and
- Multiple testing stages and test cycles to ensure appropriate quality control.



Ascend Step 1: Planning and Needs Assessment

Ascend Step 1: Planning and Needs Assessment Project Plan Phases: Initiation & Planning and Design Quality Assurance Control Step: Needs Assessment Acceptance & Project Plan Acceptance		
Activities:	Sample Tasks:	Deliverables:
➢ Project Kick off ➢ Project Framework Review and Tailoring ➢ Business Process Review ➢ Needs Assessment ➢ Final Scope Review and Approval ➢ Project Charter ➢ Project Plan / Resource	➢ Define Business Goals ➢ Desired-State development ➢ Determine Detail Requirements & Gaps ➢ Estimate development effort ➢ Identify project team resources ➢ Develop Project Mission, Objectives, Scope, &	➢ Project Framework ➢ Needs Assessment Schedule ➢ Needs Assessment Documents ➢ Executable Project Plan ➢ Project Charter and Project Strategies ➢ Training for team members ➢

Ascend Step 1: Planning and Needs Assessment Project Plan Phases: Initiation & Planning and Design Quality Assurance Control Step: Needs Assessment Acceptance & Project Plan Acceptance		
Activities:	Sample Tasks:	Deliverables:
Plan ➢ ➢	Assumptions ➢ Project Organization, Roles, & Responsibilities ➢ Establish Project Framework ➢ Detailed Work Plan ➢ Risk & Abatement Strategies ➢ Change Management Plan	

Project Framework Review and Tailoring

Every institution has different maturity in Program and Project Management. The Ascend Methodology was designed to be tailored and scalable for every client. After the engagement begins, the assigned Engagement Manager and Project Manager will visit with the Project Sponsor and Executive Steering Committee to discuss the maturity level of the organization and who the right individuals are, to decide the complexity of the Project Management Framework that will be used.

An example of how the Project Framework can be scaled is shown in how the project plan is built and tracked. While building a plan at this scale is achievable, maintaining at this level is nearly impossible without proper project management staffing. Institutions with a mature PMO and Project Management experience may have the tools available to accommodate time reporting against tasks in the project plan. Without adequate tools, more staff would be required to capture and maintain the level of detail required to track tasks at that level. A less mature model may be OK with a duration -based plan, with detail at a higher level. For instance, rather than tracking each of the steps of a particular development flow in the project plan, we may just track the item itself at a higher level and keep a pulse on the progress outside of the master project plan. The benefit to this is that less overhead is required, to keep sight on the current status. The negative is that the status of the project becomes subjective and is not a factual measurement of the feasibility to complete the work with the staff assigned.

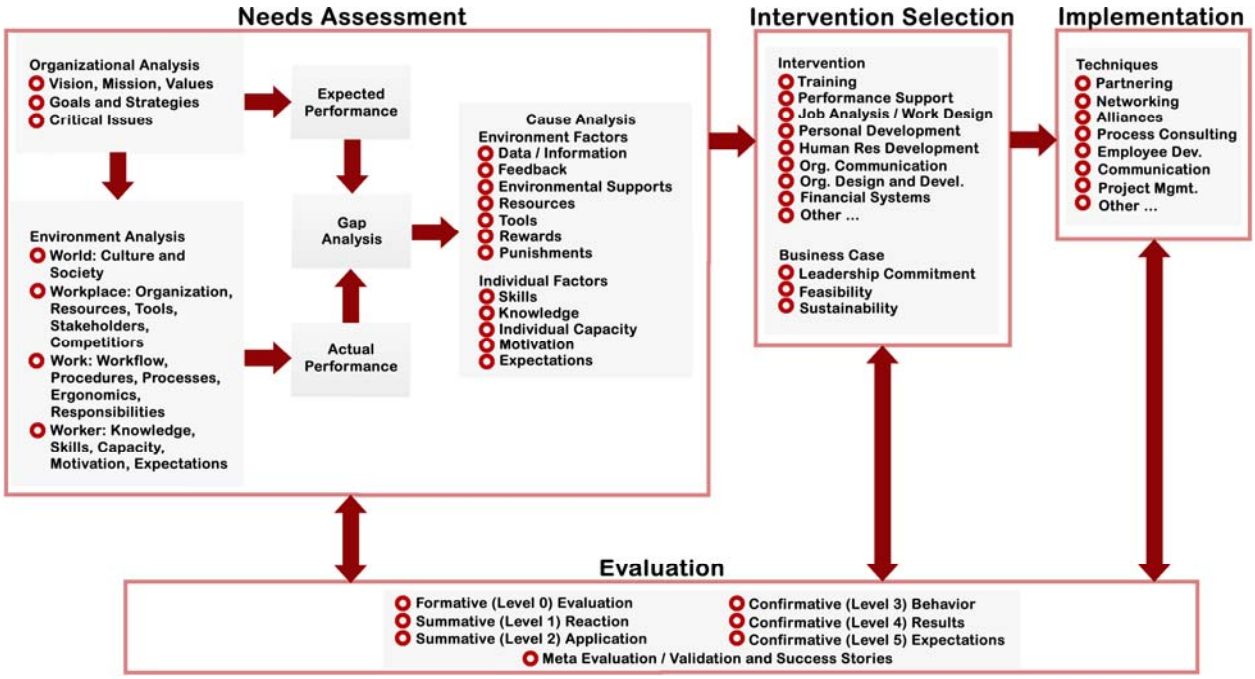
Highstreet will review all the supporting documentation of our Project Management Framework with your team and tailor it to fit your institution. Project Management Framework scope to include the following items:

- Issue Identification and Resolution Process
- Risk Identification and Abatement Process
- Status Reporting Process
- Communication Management Process
- Resource Management

- Workplan and Schedule Maintenance
- Quality Assurance Process
- Scope Management and Change Request Process
- Project Book Management and Project Artifact Management
- Deliverable and Milestone Acceptance Process

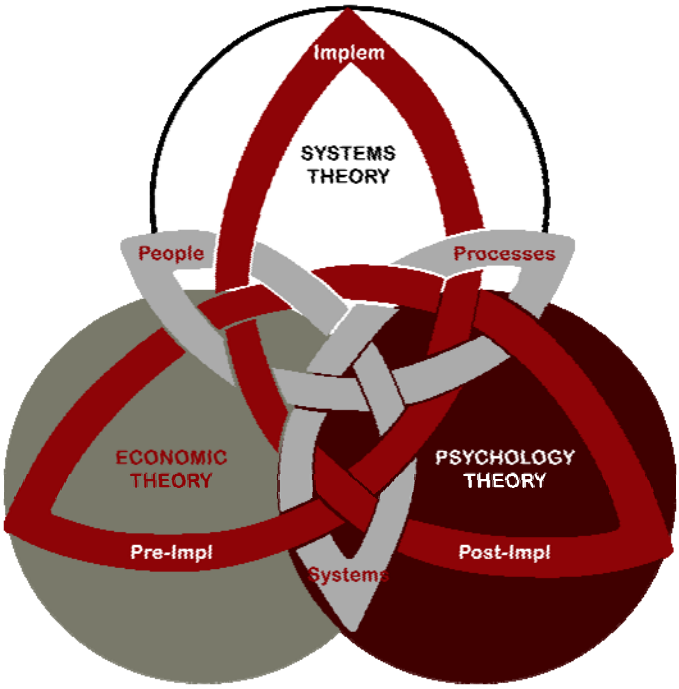
Change Management Model

Highstreet brings both a solid theoretical and practical approach to change management. Highstreet's approach is to use the industry-standard model (often called the ISPI model) and then custom-tailor the process to the institution.

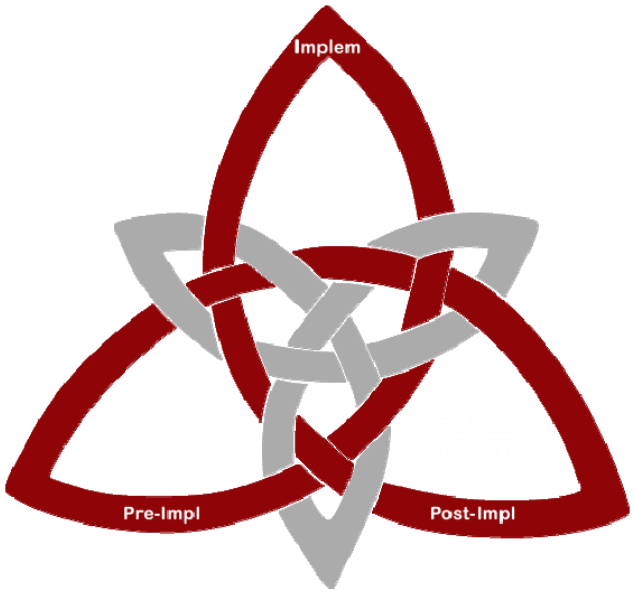


Source: Fundamentals of Performance Improvement (3rd ed.), Van Tiem, Mosely, and Dessinger

From this industry-stand, Highstreet has developed and added the Accelerated Change and Education System (ACES) model. The ACES model is an inter-disciplinary approach that uses theory as its foundation, along with the accumulated practical experience of Highstreet consultants, to effectively deliver bottom-line business value. More importantly, the Highstreet Change Management consultants have strong technical backgrounds that enable them to translate technical and business processes into learning content.



Why ACES? ACES captures the complexity, challenges, and risks associated with the implementation of enterprise-level software projects, including ERP, CRM, and other large IT projects. In the majority of failures in these types of projects, it is the human factors, around change, that are primarily to blame. If the client underestimates the risks or is unaware of the challenges of these implementations, it will not be due to lack of advisement.



Operating Model Phases

Management of the change process is cyclical, and is not separated by clearly delineated lines of change. Management of any change process has to start somewhere, and the preference is for it to start as early in the system pre-implementation phase as possible.

Typical risks that can be countered in the pre-implementation phase are:

- **Risk:** Training is delayed, because it is too early to begin training.
  - **Response:** Training the right people on the right topics, using the right tools is essential to the success of the pre-implementation team. The training that is done at this phase is not—and should not be—similar to the end-user training done near the implementation phase. This training should focus on the information that the pre-implementation phase team needs in order to succeed.
- **Risk:** Training is wasted, because too much is given to the wrong group of people.
  - **Response:** Identifying the pre-implementation phase team is an essential part of the training needs assessment. Combining the results of this assessment with the CMES team's expertise leads to a targeted plan that minimizes waste.
- **Risk:** Training is wasted, because the pre-implementation team attended a single event.
  - **Response:** Training, as part of change management, is not an event. It is a process. CMES' solution uses blended learning with supporting materials and collaterals that allow each pre-implementation team member to learn on their own schedule, at their own pace, preemptively resolving the single event problem by preventing it from being an issue.

Progressing into the implementation phase, the CMES team continues at the natural spot where most change management and education teams begin. Because the CMES team has been involved at the appropriate levels, throughout the project lifecycle, nothing is going to come as a surprise.

Typical risks that can be countered in the implementation phase are:

- **Risk:** Training will not be accomplished by the go-live date.
  - **Response:** CMES does not use an instructor-led model for the bulk of go-live training. CMES also has a catalog of reusable learning content that can be deployed as-is, or it can be personalized or tailored to the specific organization.
- **Risk:** Training is wasted, because the learners attend a single event.
  - **Response:** As previously mentioned, training, as part of change management, is a process, not an event. CMES' solution uses blended learning with supporting materials and collaterals that allow each learner to absorb the material on their own schedule, at their own pace, repeating each bit of task training as needed by that learner. Additionally, each learner is provided with electronic performance support systems (EPSS) to reinforce their learning and to ensure a more rapid and sustainable change.
- **Risk:** Training is wasted, because too much is given to the wrong group of people.
  - **Response:** A training needs assessment is conducted during the pre-implementation phase, and the training needs of each learner are identified. Waste is minimized.
- **Risk:** Training materials are not ready by go-live.
  - **Response:** The training needs assessment conducted during the pre-implementation phase clearly defines the necessary training components. CMES' catalog of reusable learning content,

along with the team's experienced change consultants, provides confidence in Highstreet's ability to deliver against the project plan.

The post-implementation phase is another area in which Highstreet's CMES team creates a distinction from the competitors. Because of the interconnected ACES model, there are processes which are accounted for, by the CMES team, which are often missed by less structured approaches. Also, post-implementation processes are often sequenced throughout the lifecycle of a project.

Common processes to consider are:

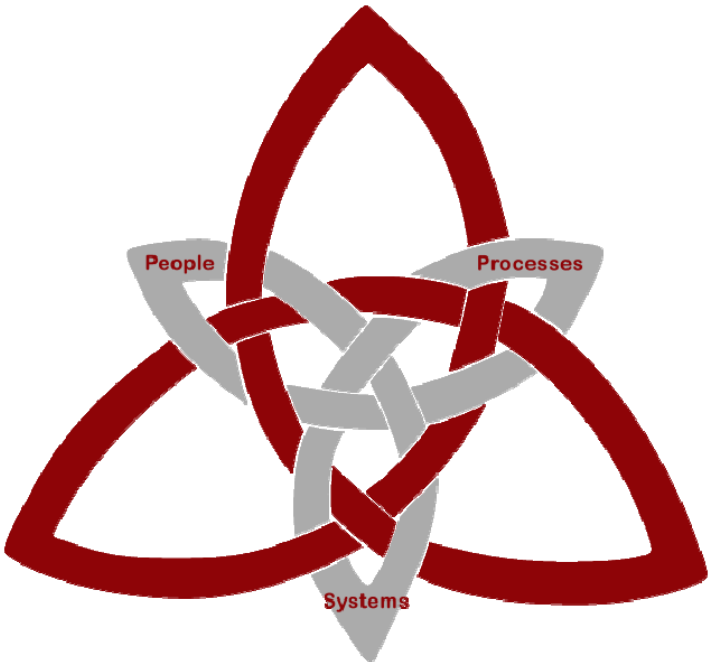
- Common change management processes like coaching, mentoring, conflict resolution, custom training materials for other projects, process improvement projects, process redesign, and others
- Post-production processes like communication processes, knowledge retention, debriefing, strength and weakness identification, next project identification and prioritization, and others

Operating Model Components

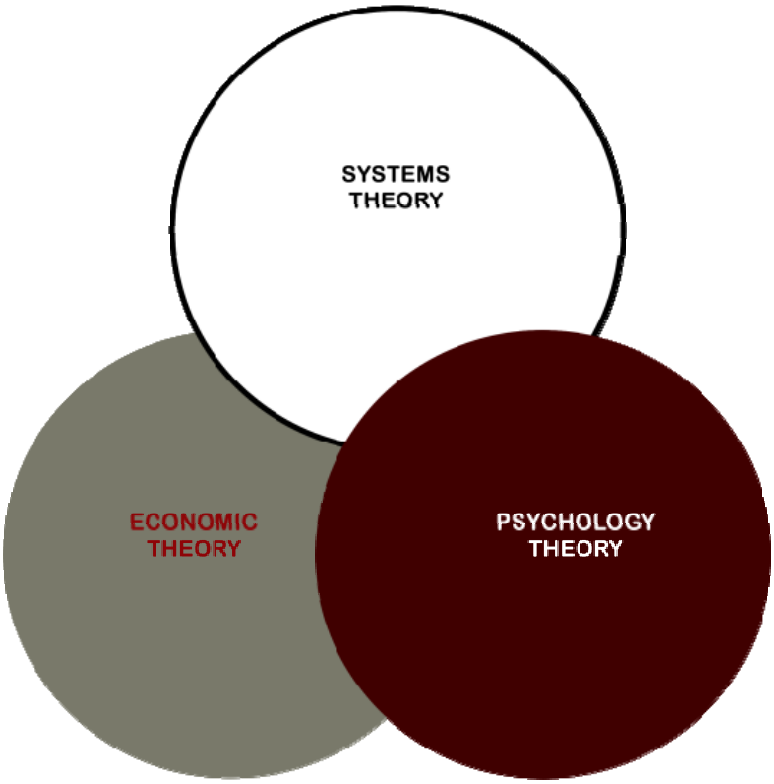
It is an all too common response for change management and education plans to designate themselves as "people first" or "employee oriented". Many of these plans use this terminology as a way to hide bloated training, provided to employees that might not need it, might not need it at that time, might not need it in that way, or might be incapable of succeeding no matter how much training they are given.

Project components must include people, processes, and systems, within a Systems Theory driven approach to managing change. None of these components are any more important than any of their counterparts, nor can any of these components be ignored. All of these components can become serious barriers to successful change, if not accounted for and managed properly.

Operating Model Theory



Without theory, it is possible and, in many cases, probable that a given change management project will lose focus. Lost focus can increase costs, increase waste, reduce ROI and, in serious cases, lead to the failure of a project. There are three (3) underlying theories that should apply to all change management and education projects.



References:

Foundations of Human Resource Development (2nd ed.), Swanson and Holton
Return on Investment in Training and Performance Improvement Project (2nd ed.), Phillips
Building Expertise (3rd ed.), Clark
Developing Technical Training (3rd ed.), Clark

Operating Model, Other Considerations

The Accelerated Change and Education System (ACES) model is characterized by the following:

- Accelerated: This comes from two (2) factors: 1) Highstreet's team has a catalog of pre-built, reusable learning components and a change management toolkit that can be delivered, out-of-the-box, to clients. These components can also be personalized or tailored for clients with the business need and budget for such projects. 2) The team uses modern tools, like Oracle UPK, Adobe Captivate, and Articulate Studio, to produce and deliver content to clients. Since these are well-known, commercially available tools, both Highstreet consultants and clients are better positioned to spend less time developing and editing content with these tools. And in situations where new team members are added by the client or Highstreet's CMES team, it is possible to directly recruit for these skills.

- Change: As the model explains, change involves significant considerations beyond just instructor-led training events. Change is a process that can be managed, but it has to be managed actively, in order to be kept under control.
- Education: The model considers much more than just training. Training is transmitting the specifics of a task to a learner. The bulk of actions that occur are training actions. However, ACES expands beyond the training limitation to explore and address those needs that cannot be addressed by simple training solutions.
- System: Part of the ACES model's foundation is system theory. You must address the entire system rather than the optimization of any single subsystem. Optimization of subsystems rarely, if ever, results in optimization of the whole. Highstreet team members understand this, and solid system thinking underpins all of their activities and work products.

Business Process Review

As the project launches, the focus will primarily be on capturing key business needs and identifying potential opportunities for streamlining and/or improving your institution's business processes. Highstreet's expansive understanding of specific Higher Education operational requirements, as well as its expert knowledge of the Oracle|PeopleSoft application, will provide the UCF team with the information necessary to explore the impacts on and possibilities of the new software for its business practices. The Highstreet team will also share their vast experiences from other campuses to facilitate further knowledge transfer about the software. These discussions will help the teams prepare detailed agendas, for highly productive Needs Assessment sessions.

Highstreet resources will complete an initial review of business processes documented, to date by the client. The business process analysis is an important step in formulating the project's Change Management plan, and also begins to prepare the team for the issues to be discussed in the Needs Assessment sessions. These business process review tasks are conducted with a focus on the following objectives:

- To review the existing documentation of UCF's business processes
- To identify industry and software best practices with regard to each business process
- To take into account the unique differences within the institution
- To identify any opportunities for gaining further efficiencies across the institution
- To prepare for the Needs Assessment sessions
- To begin mapping the major aspects of the change management

Needs Assessment

Highstreet will bring UCF the best practices for executing Needs Assessment sessions in general, and more specifically, we will help UCF leverage the Needs Assessment approach applied by the other institutions where Highstreet Consultants have implemented.

Other methodologies you will review may reference Fit/Gap sessions. Highstreet's Needs Assessment approach means that we focus more on how your organization performs business now and on what can be done to do business better in Oracle|PeopleSoft. With each of our clients, Highstreet prepares for the needs assessment sessions with a thorough review of UCF's "as-is" business processes. Highstreet will provide a Needs Assessment questionnaire to assist in understanding current processing where current business process documentation may be lacking. From that base of information, Highstreet designs

targeted Needs Assessment sessions that compare (in depth) the functionality delivered with current institution requirements. Iterative discussions provide the project teams with a full understanding of how decisions associated with implementing the new software will impact project objectives, campus operations and future maintenance.

During the Needs Assessment discussions, Highstreet also helps the project teams to proactively explore and plan, in detail, for the integration points between and across core Oracle|PeopleSoft suite applications and modules. Additionally, the touch points between the other Oracle technologies and other third-party products being introduced (or planned for introduction) into the environments are carefully considered.

Highstreet Needs Assessment sessions are heavily focused on transferring knowledge about the applications and the new changes, to participants. Our expert consultants provide detailed examples of how other institutions specifically incorporated new functionality, kept customization levels to a minimum, increased processing efficiencies and extended the core application capabilities through leveraging technology options.

To facilitate meaningful integrated discussions that result in clear outcomes, Highstreet will work with UCF's team leads to craft an overarching Needs Assessment schedule; this will incorporate multiple sessions and integrated teams to account for all of the areas to be impacted by the new enterprise software. Session agendas and Needs Assessment materials will then be created with the project and module leads and will be focused on the business process supported by the scope of software identified as a part of the engagement. These agendas and materials will be distributed well in advance of the sessions to ensure maximum participation levels. All session outcomes will be documented to provide a comprehensive view of how the Needs Assessment decisions, issues and developments are impacting UCF's future, highly-integrated and streamlined enterprise system.

The typical deliverable produced from these Needs Assessment sessions is a Needs Assessment document that includes:

- Business process documentation
- Recommendations and options for incorporating functionality
- Technical strategies
- High level development estimates
- Integration considerations and implementation maps across the following areas:
    - Functionality and processes (Identify any process modifications requiring changes to KS' policies or procedures. Recommend an appropriate duration of time for KS to consider the proposed changes to the business processes, without delaying the project.)
    - Interfaces
    - Reporting Data
    - Access Control (Security)
    - Testing
    - Training
    - Self-Service

Most importantly, it will serve as the foundation for the Readiness Assessment that will determine if your institution is ready for production. A sample Needs Assessment document for required modules that will be delivered to UCF has been included in the Appendix.

Final Scope Review and Approval

After the Needs Assessment sessions have concluded and the final findings have been presented, we will review with the UCF project team and executive leadership. This review is the first quality checkpoint to make sure that expectations have been met, relating to the Needs Assessment sessions and final documentation. The Needs Assessment documentation produced is the foundation for all scope that will be included in the project, and will be the foundation for the final work breakdown structure. The final approved scope will be incorporated into the project charter, which will be the governing document for all work moving forward. Any desired change in scope will have to follow the established Change Request Process. Approval will be based on the governance model associated with that process.

Project Charter and Project Strategies

A project charter is a statement of the scope, objectives and participants in a project. It provides a preliminary delineation of roles and responsibilities, outlines the project objectives, identifies the main stakeholders, and defines the authority of the project manager. It serves as a reference of authority for the future of the project.

The purpose of the project charter is to document:

- Reasons for undertaking the project
- Objectives and constraints of the project
- Directions concerning the solution
- Identities of the main stakeholders
- In-scope and out-of-scope items
- High level risk management plan
- Communication plan
- Target project benefits
- High level budget and spending authority

Highstreet will interview UCF leadership, as well as project team members and stakeholders, to obtain the information required to draft the project charter. The project charter will include approved scope from the Needs Analysis session. After the initial draft has been completed, Highstreet will present to UCF project leadership for review, ratification and adoption for the project.

As a part of the process, Highstreet will present the template strategy documents we use on our engagement, to be tailored to fit the needs of UCF. The process used for this review is similar to the process used to establish the Project Framework. The strategy documents are to establish a common understanding of how we will approach different activities of the project. It establishes the control by which quality will be measured. The following strategy documents will be addressed:

- Development Standards and Workflow Process
- Data Conversion Strategy and Workflow Process
- Configuration Documentation and Standards Strategy
- Change Management and Education Strategy

- Environment Use and Instance Management Strategy
- Data Access (Security) Design Strategy
- Testing Strategy
- Communication Strategy

Project Plan

The development of the project plan is a multi-step process, which involves all project team members. Highstreet will build a Work Breakdown Structure (WBS) with identified dependencies, using a model plan that follows the Ascend Methodology, and will incorporate all approved scope, as referenced in the Project Charter, Statement of Work section. The detail of the tasks itemized in the WBS will be based on the pre-approved approach, referenced in the Workplan and Schedule Maintenance documentation. The WBS will be structured to accurately assess the status of key business processes related to the project. For instance, all tasks related to configuration, conversion, and development for a process like "Procure to Pay" will be grouped under the "Procure to Pay" section of the project plan. Business Process was used to guide the Readiness Assessments, so that the thought process does not deviate from the logic already introduced to UCF. This becomes very important when trying to assess readiness, by area, for entrance into each of the testing phases of the project, as well as go live readiness. We find that grouping tasks by process, rather than by module, forces tighter communication across modules and the institution. The approach to managing work by process is fundamentally different than other methodologies you may review. It is important to note that UCF is implementing technology to improve a process, not just to use a module.

After the WBS has been drafted, it will be circulated to the Project Team for review. Feedback will be incorporated into the plan, to provide a common understanding of the project task that will need to be completed. The Highstreet Project Manager will review all tasks with the team and answer questions related to any of the tasks that are not clear, and clarify any assumptions related to what is expected out of each task. Any clarifying points or further detail developed will be incorporated into the Task Dictionary to be referenced during estimation and throughout the project.

As a part of the WBS review, Highstreet will work with UCF to identify the resources required to complete the work, based on experience and availability for the project. There is a delicate balance between having those people who can make decisions and those who are able to complete work assigned to them. Highstreet will work with UCF to determine the right blend of resources to complete the tasks.

After the WBS has been established, estimation will begin. Highstreet has a baseline estimation that will be used as the default, for each of the baseline tasks in the plan. Each item identified requiring development will follow our estimation process, where a solutions architect will estimate the development effort of that item based on the information provided in the Needs Assessment documentation. Highstreet will estimate using the established estimation guidelines as outlined in the pre-approved Development Workflow Process. The estimation for the remaining tasks will be completed, initially, by the Highstreet resources that were engaged in the Needs Assessment Sessions. The amount of effort required for configuration and data conversion can vary based on the complexities identified in Needs Assessment Sessions. Baseline estimates for those activities will be rounded up or down based on the findings.

After initial estimates have been captured and resources allocated and assigned to tasks in the project plan, a review of the estimated dates will be reviewed against the high level timeline to assess feasibility, given the current resource load. If everything aligns correctly and no risks are identified, a baseline will be established using the calculated dates. If the dates do not show that the project would be successful with the current resource load, the project management team will continue to modify the plan until a leveled plan, with available resources, can be established. If the team is not able to come to a workable plan, a risk will be identified and escalated to the Executive Steering Committee for review and reaction. This may result in a review of approved scope for possible areas of mitigation, given the resource or time constraint.

After the baseline is established, the Project Management team will perform a detailed review with the Project Team member and the Executive Steering Committee for final review and acceptance. This review is the second quality checkpoint to make sure that the project has established the appropriate staffing and that there is an executable plan to complete the project successfully. The Highstreet Engagement Manager will be involved in this process, to ensure that any issues are worked out prior to proceeding to Step 2 of the Ascend Methodology.

Project Timeline

The project timeline is a critical issue, based on a range of factors, and can be important to the ultimate success of the project. Developing a timeline that is too short can result in ongoing deadline revisions, project team frustration and loss of senior level support. A timeline that is too long makes it difficult for the project team to make the implementation a priority, increases the potential of resource burnout, increases the possibility of midstream upgrades to the software, and defers the benefits of the new system. Some typical assumptions for FMS and HCM implementations are below:

- Go live dates for FMS correspond to UCF Fiscal Cycle, HCM is aligned to the calendar year.
- The timeline is based on deploying functionality as a "big bang" approach. The timeline will be based on completing the planning, configuration, development, testing and training necessary to deploy the functionality in that phase.
- Production support has been factored to support many of the first production runs of FMS and HCM Business Processes.

During Step 1: Planning and Needs Assessment of the Ascend Methodology, Highstreet will validate this approach with UCF, to ensure that all institutional needs are met with the deployment timeline.

Projected Business Process Functionality Deployment Timeline for First Use in Production

Financial Management System/Supply Chain Management First Use Date - [7/1/15]

High Level Business Processes	Related Oracle | PeopleSoft Modules
Commitment Control Budget Adjustments	Commitment Control
Procure to Pay	Purchasing, Accounts Payable
Procurement card Processing	Purchasing, Accounts Payable
Grants Awards to Billing	Grants, Projects, Billing, Accounts Receivable, and Contracts

High Level Business Processes	Related Oracle	PeopleSoft Modules
Recording Cash and Managing Receivables	Accounts Receivable, Treasury	
Expense Processing	Travel and Expense, Accounts Payable	
Asset Acquisition to Retirement	Asset Management	
Capital Project Billing	Projects, Billing, Accounts Receivable	
Grants Award to Closeout	Grants, Projects, Billing, Accounts Receivable, and Contracts	
Monthly Closing	General Ledger, Accounts Payable, Asset Management	
Bank Statement Processing	Treasury	
1099 Processing	Account Payable	
Annual Closing	General Ledger, Accounts Payable, Asset Management	
Chart of Accounts Maintenance	General Ledger	
Inventory Maintenance	Inventory	
Investment Management	Treasury	

Human Capital Management First Use Date - [1/1/16]

High Level Business Processes	Related Oracle	PeopleSoft Modules
Position Management & Job Changes	Human Resources, Talent Acquisition Manager, Commitment Accounting	
Hire Employee	Human Resources, Talent Acquisition Manager, Benefit Administration, Absence Management, Payroll	
Life Event Changes	Human Resources, Commitment Accounting, Benefit Administration, Payroll, Absence Management	
Compensation Changes	Human Resources, Commitment Accounting	
Payroll and Leave Management	Payroll, Absence Management	
Terminate Employee	Human Resources, Benefit Administration, Absence Management, Payroll	
Periodic and Annual Events	Human Resources, Commitment Accounting, Benefit Administration, Payroll, Absence Management	

Ascend Step 1: Deliverable Definition Table

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
01	Project Framework	Establish Project Management guidelines and procedures that will	Each Highstreet template has been reviewed and modified, to support	Highstreet will present our processes for each area. Highstreet and UCF will jointly review the document and will tailor	MS Word Documents

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
		be used to manage all activities and work, associated with the project. Establish an Issue Identification and Resolution Process. Establish a Risk Identification and Abatement Process. Establish a Status Reporting Process. Establish a Communication Management Process. Establish a Resource Management Process. Establish a Workplan and Schedule Maintenance Process. Establish a Quality Assurance Process. Establish a Scope Management and Change Request Process. Establish a Project Book Management and Project Artifact Management Process.	UCF's environment. All business process needs are clearly defined, and estimated. Responsibility for each need is clearly assigned. UCF has validated the accuracy of all produced documentation, and works with Highstreet to resolve any defects.	the processes to support UCF's environment and culture. Highstreet will finalize edits for final adoption. Highstreet will maintain the process documents throughout the project, based on mutually-agreed-upon needs.	
02	Needs Assessment Schedule	Provide an overview of major Needs Assessment sessions and subtopics, to support facility and attendee scheduling. Listing of days, times, business processes and	All dates, activities and attendees are identified and documented.	Highstreet will draft the schedule and work with UCF to assign resources and adjust schedules, as needed.	MS Word document

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
		supporting software modules and subtopics, along with recommended attendees.			
03	Needs Assessment Documents	Provide detailed Documentation of Needs Assessment sessions, proposed solution moving forward, and task responsibilities, to support detailed Project planning. Inventory of Proposed Business Processes. Listing of areas for potential business process improvement. Proposed business process flow in Oracle|PeopleSoft and a listing of any identified needs that should be addressed, to achieve an optimized business process flow in Oracle|PeopleSoft, along with recommended solutions for each need. Listing of proposed Modifications and Customizations, and high-level effort for each.	Each section of the Highstreet template is completed. All business process needs are clearly defined, and estimated. Responsibility for each need is clearly assigned. UCF validates all produced documentation for accuracy, and works with Highstreet to resolve any defects.	Highstreet will document all business process needs, as described in the description. UCF validates accuracy of all produced documentation, and works with Highstreet to resolve defects.	MS Word document

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
		Listing of proposed Interfaces and high-level effort for each. Listing of proposed Workflow and high-level effort for each. Listing of legacy reports and alignment with Oracle|PeopleSoft delivered reports and/or required custom reports. Listing of required security rolls, to support each business process. Listing of Change Management and Education Challenges. List of identified issues or risks, with review business processes.			
04	Project Charter and Supporting Strategy Documents	Project documentation that outlines the scope of work to be completed and supporting strategies to complete the work	Completion and client acceptance of the following documents: Development Standards and Workflow Process Data Conversion Strategy and Workflow Process Configuration Documentation and Standards Strategy Change Management and Education Strategy Environment Use and Instance	Highstreet will present our standards for each area. Highstreet and UCF will jointly review the document and will tailor the processes to support UCF's environment and culture. Highstreet will finalize edits for final adoption. Highstreet will maintain the process documents throughout the project, based on mutually-agreed-upon needs.	

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
			Management Strategy Data Access (Security) Design Strategy Testing Strategy Communication Strategy		
05	Executable Project Plan	Provide a method for tracking, monitoring, and measuring project progress. Complete Work Breakdown Structure with identified dependencies, organized by Business Process, where applicable.	All milestones, activities, tasks, subtasks and deliverables are identified by date. All dependencies are identified. Project resources have been allocated and assigned to tasks. All Tasks are properly sequenced and associated with a business process, where applicable. Tasks are leveled, and start and end dates support the project timeline. Baseline has been established.	Highstreet will create the initial Project Plan, including all Tasks, sequencing and resource assignment. Highstreet and UCF Project Leadership will ensure that resource assignments are made properly and that all Tasks are clearly defined and sequenced. Highstreet is responsible for updating this Deliverable throughout the project.	MS Project
06	Training for team members	Each project team lead should have formal training in Oracle|PeopleSoft, to establish a base understanding of the application for the areas that they will support.	Training Schedule has been developed. Identified users have completed training.	Highstreet will work with UCF to develop training schedule. UCF will send users to training. UCF will submit a Deliverables Acceptance Form, at the completion of training, to Highstreet for acceptance.	MS Word

Ascend Step 1: Milestones

ID	Name	Acceptance Criteria	Responsibilities	Format
01	Step 1: Planning and Needs Assessment Complete	All activities in Step 1 of the Ascend Methodology have been completed. All identified deliverables have been presented to and accepted by UCF.	Highstreet to present the Milestone Acceptance Form. UCF to review and approve, or deny with required corrective action. Highstreet to work with UCF to address any corrective actions.	MS Word

Ascend Step 2: Rapid Configuration and Business Process Modeling

A key success factor in the Ascend Methodology is configuring the Oracle|PeopleSoft system as quickly as possible, with UCF configuration values. Our experience has proven that the sooner we can prototype UCF's specific business process, the more successful the project will be. Configuration is a dependency of every other task related to Steps 2-5 in the Ascend Methodology.

Ascend Step 2: Rapid Configuration and Business Process Modeling Project Plan Phase: Execution and Construction, Monitoring and Controlling Systems Quality Assurance Control Step: Ascend Step 2 – Project Quality Review		
Activities	Tasks:	Deliverables:
➢ Configuration ➢ Unit Testing	➢ Establish Baseline Configuration to support business processes ➢ Develop Unit Testing Plan ➢ Identify Unit Testing Scenarios	➢ Unit Testing Summary Report

Rapid Configuration

The Oracle|PeopleSoft software is developed based upon a 'best business practice' for individual administrative business processes. As such, we focus on extending and leveraging the capabilities of the software and encourage the exploration of acceptable alternatives which minimize customizations and bolt-on applications.

One of the first required tactical tasks would be to configure the system. We will take an iterative approach to this process, which will accelerate valuable knowledge transfer to the team and advance the project quickly toward its early critical milestones. This iterative approach will also validate, in a 'hands-on' manner, the assumptions that were generated during the Needs Assessment analysis work.

The first iteration will include configuring the software and demonstrating its ability. This initial configuration exercise will transform all of the basic elements of UCF's business into the Oracle|PeopleSoft context. The second iteration will follow the same lifecycle for an even larger and more diverse population

of scenarios. This second iteration of the configuration will expand upon what was learned in the first, and may identify some further specific business processes that need to be incorporated. The third and all following iterations will continue the process of increased complexity of configuration, to accommodate additional sets of scenarios.

This iterative approach also allows for thoughtful consideration, along the way, of the many associated impacts. Furthermore, it lends itself to more thorough testing because each evolution of the UCF business process modeling being configured results in additional insights, which ultimately lead to a higher quality implementation than is possible without this approach.

Proper configuration of the PeopleSoft applications is the pivot point of the entire implementation. Correct and complete configuration can eliminate the need for customizations, by utilizing the delivered functionality, to best support your business processes.

Highstreet uses a collaborative approach to configuration management. Our functional and technical experts work side-by-side with the organizations business process experts to decide the proper configuration settings to use. This is a critical part of the knowledge transfer required to understand the inner workings of the applications.

PeopleSoft applications deliver a utility called Setup Manager which is used to track configuration tasks for each application. Depending on what modules are selected for implementation, Setup Manager creates a list of configuration tasks that must be accomplished in a specific order. Highstreet uses this list to identify configuration tasks and then work with UCF's functional business process experts to determine what settings to make for each task.

Unit Testing

The Unit Test validates a single function, extension, or business process. Any element of the system that has been tailored will be eligible for unit testing. Unit testing occurs throughout the project but will be most heavily executed during the development phase for each module.

After we have completed initial configuration of the modules, to support approved business processes, we will begin unit testing the functionality. This is an iterative process where we will continue to configure and unit test until we are confident that we have worked out any identified issues. The configuration and unit testing built into this phase is the foundation for all of the work in later phases of the Ascend methodology.

As the Highstreet and UCF teams run through the unit testing exercise, they will begin to identify test scripts and scenarios that will be important to test in support of the scope Business Processes. The unit testing will be the first modeling of these business processes in Oracle|PeopleSoft. These will become the foundation for the development of the system testing and user acceptance test plan, in future rounds of testing.

Configuration Review and Update

The result of unit testing is that the review and configuration established in during Rapid Configuration is updated, to support the resolution of any findings that warrant the change. This is an ongoing process throughout the implementation: Test, react, modify.

Ascend Step 2: Deliverable Definition Table

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
07	Unit Testing Summary Report	Business Process Modeling activities to validate that UCF configuration will support the needs of the institution.	➢ Unit Testing Plan has been drafted. ➢ Unit Testing Scenarios have been identified. ➢ Unit Testing Scenarios have been executed. ➢ Issues identified have been captured and Unit Testing Summary Report for each Business Process has been presented to Project Management, for review and corrective action.	➢ Highstreet will lead the UCF through the unit testing process. ➢ Highstreet will draft the Unit Testing Plan. ➢ Highstreet will lead UCF through the process of identifying Unit Testing Scenarios.	MS Word

Ascend Step 2: Milestones

ID	Name	Acceptance Criteria	Responsibilities	Format
02	Step 2: Rapid Configuration and Business Process Modeling	All activities in Step 2, of the Ascend Methodology, have been completed. All identified deliverables have been presented to and accepted by UCF.	Highstreet to present the Milestone Acceptance Form. UCF to review and approve, or deny with required corrective action. Highstreet to work with UCF to address any corrective actions.	MS Word

Ascend Step 3: Business Process Calibration and Gap Analysis

By this step of project, the project team has seen some types of processing in Oracle|PeopleSoft and UCF is beginning to see the Gaps, as captured in the Needs Assessment. Creative ideas are beginning to form, on how to address the gaps, without the need for a customization or bolt-on.

Ascend Step 3: Business Process Calibration and Need Design Project Plan Phase: Execution and Construction, Monitoring and Controlling Systems Quality Assurance Control Step: Specification Review and Ascend Step 3 Project Quality Review		
Activities	Tasks:	Deliverables:
➢ Data Conversion Mapping ➢ User Profiles ➢ Security Structure ➢ Functional Design Specs ➢ Technical Design Specs ➢	➢ Schedule design workshops ➢ Conduct design workshops ➢ Develop functional & technical specifications for ➢ Data conversion ➢ Interfaces ➢ Customizations ➢ Reports ➢ Security ➢ Scheduled Processes ➢ Workflow	➢ Data Conversion Design Documents ➢ Interface Design Documents ➢ Customization Design Documents ➢ Report Design Documents ➢

Data Conversion

The conversion of legacy system data, to any new system, is a critical activity of a software implementation project. If not planned and executed appropriately, conversion can be one of the most significant risk factors to a successful implementation. It can be a key cause for delay and/or point of failure in software implementations.

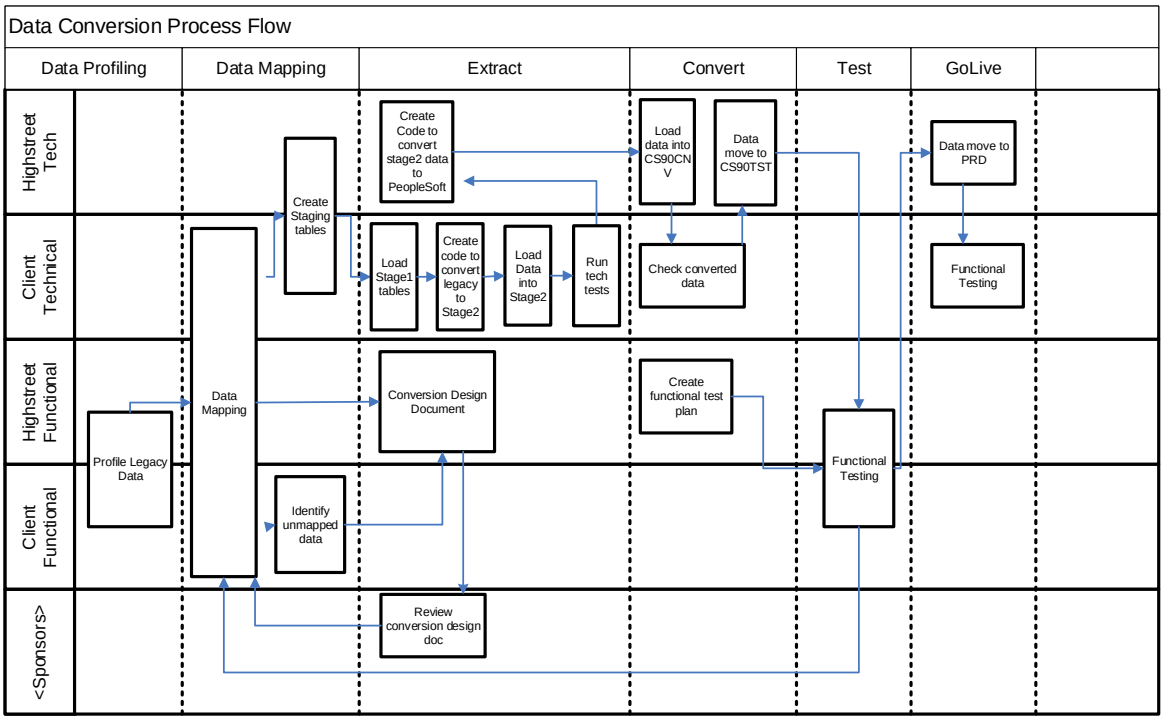
The objective of this conversion plan is to:

- Define the conversion process
- Clearly document conversion timelines
- Identify conversion target tables
- Record dependencies among module conversions

Conversion Process

The conversion process will require a collaborative effort by functional and technical teams, to identify what data will be converted, where and how it will be converted, as well as coding, testing and validation. The key to this process is the data mapping document; this document will provide a detailed map of the target Oracle|PeopleSoft tables and fields, to their corresponding source tables and fields in UCF's Legacy Application. In addition, the mapping document will provide the translation details and field default values, where required. The following image illustrates the data conversion workflow process that Highstreet follows, on most of our engagements. In Ascend Step 3, Highstreet will pick up where the data conversion strategy left off as we begin to explore the data elements that need to be converted. Throughout the process, the Highstreet data conversion team will explain the impact of how we convert that data, on the business processes they support. An illustration of the data profiling and data mapping, as well as how these activities set the foundation of all the other data conversion efforts, is represented in the graphic below. Much like configuration, the quicker the mapping and translation rules can be completed, the more successful the project will be. Early completion of data conversion allows for more testing to occur with real production data, in the later phases of the project. After the data profiling, data mapping and

translation rules have been completed, the final products will be presented for institutional review, prior to beginning development.



Scope of Data Conversion

The best practice approach to data conversion is to convert only data that is critical to executing business processes. Many institutions feel it is necessary to convert all data that has a digital record, going back to the beginning of time. Highstreet urges all of our clients to analyze the cost benefit of doing a complete conversion of all historical data. Highstreet does encourage the concept of warehousing data that is key to institutional analysis needs and making plans to bridge future transactions, which will be generated out of the Oracle|PeopleSoft application. Highstreet will work with UCF in determining the right amount of data to be converted, after the Needs Assessment session, while reviewing and finalizing the Data Conversion Strategy.

Security Design Specifications

There are a number of steps required to define the access control for users in Oracle|PeopleSoft. To define the delivered access control in Oracle|PeopleSoft, we must follow a few steps in a given sequence. Using the Access Control (Security) Strategy as a guide, Highstreet will work with UCF to develop the security requirements needed to produce the production level security.

Functional and Technical Design Specifications

Highstreet will tie all design and development to the final scope, approved from the Needs Assessment Sessions, which identify gaps and their suggested resolutions. Throughout the design phase of the project, every effort is made to fill these gaps via configuration of the system, in order to keep it as "vanilla" as possible. For those gaps that require additional custom development, a formal document describing the

proposed solution will be presented to the project sponsor(s), for approval. Once approved, the functional team will create a functional specification document, for submission to the technical team, to continue with the technical design. As the technical developer proceeds with the development, there will be several iterations of review and unit testing with the functional team, which ultimately will be incorporated into the final system and user acceptance testing. Once validation and final sign-off are complete, the technical developer will provide documentation for tracking the customization, for on-going system maintenance. Some examples of development that might be included in these deliverables are:

- Custom interfaces to/from ancillary systems
- Branding of output such as AP checks, paychecks, reports
- Minor changes to the delivered GL interface, to track finances unique to the organization

Ascend Step 3: Deliverable Definition Table

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
08	Data conversion Design Documents	Data conversion design documents detail the requirements needed, to support the development of technical solutions for each of the identified data sets. The design document includes transformation logic, and detail of how much data will be converted. Each design document will be accompanied with supporting data conversion mapping spreadsheets that outline the field by field mapping, for required data elements in the data set.	➢ All sections of the template are filled out correctly. ➢ The Specification has passed all required approvals.	➢ Highstreet will lead the process of collecting the requirements. ➢ Highstreet will draft the design documents and associated data mapping spreadsheets. ➢ UCF will review the documents for accuracy. ➢ UCF will contribute updates, as a part of the review process. ➢ Highstreet will maintain the documents until accepted, as a deliverable, by UCF. ➢ UCF will maintain documentation after deliverable is accepted.	MS Word
09	Customization Design Documents	The customization design documents detail the requirements needed, to support the development of	➢ All sections of the template are filled out correctly. ➢ The Specification has passed all	➢ Highstreet will lead the process of collecting the requirements. ➢ Highstreet will draft the design documents. ➢ UCF will review the documents for accuracy. ➢ UCF will contribute updates, as	MS Word

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
		the technical solutions for each of the identified customizations.	required approvals.	a part of the review process. ➢ Highstreet will maintain the documents until accepted, as a deliverable, by UCF. ➢ UCF will maintain documentation after deliverable is accepted.	
10	Workflow Design Documents	The workflow design documents detail the requirements needed, to support the development or setup of a technical solution for each of the identified workflows.	➢ All sections of the template are filled out correctly. ➢ The Specification has passed all required approvals.	➢ Highstreet will lead the process of collecting the requirements. ➢ Highstreet will draft the design documents. ➢ UCF will review the documents for accuracy. ➢ UCF will contribute updates, as a part of the review process. ➢ Highstreet will maintain the documents until accepted, as a deliverable, by UCF. ➢ UCF will maintain documentation after deliverable is accepted.	MS Word
11	Interface Design Documents	The Interface design documents detail the requirements needed, to support the development of technical solutions for each of the identified interfaces. The design document includes transformation logic required, for the successful transmission of data between source and target system. Each design document will be accompanied with supporting data mapping spreadsheets that outline the field by field mapping, for required data elements.	➢ All sections of the template are filled out correctly. ➢ The Specification has passed all required approvals.	➢ Highstreet will lead the process of collecting the requirements. ➢ Highstreet will draft the design documents and associated data mapping spreadsheets. ➢ UCF will review the documents for accuracy. ➢ UCF will contribute updates, as a part of the review process. ➢ Highstreet will maintain the documents until accepted, as a deliverable, by UCF. ➢ UCF will maintain documentation after deliverable is accepted.	MS Word
12	Report Design	The report design	➢ All sections of the template are	➢ Highstreet will lead the process	MS Word

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
	Documents	documents detail the requirements needed, to support the development of technical solutions for each of the identified reports.	filled out correctly. ➢ The Specification has passed all required approvals.	of collecting the requirements. ➢ Highstreet will draft the design documents. ➢ UCF will review the documents for accuracy. ➢ UCF will contribute updates, as a part of the review process. ➢ Highstreet will maintain the documents until accepted, as a deliverable, by UCF. ➢ UCF will maintain documentation after deliverable is accepted.	

Ascend Step 3: Milestones

ID	Name	Acceptance Criteria	Responsibilities	Format
03	Step 3: Business Process Calibration and Gap Analysis	➢ All activities in Step 3, of the Ascend Methodology, have been completed. ➢ All identified deliverables have been presented to and accepted by UCF.	➢ Highstreet to present the Milestone Acceptance Form. ➢ UCF to review and approve, or deny with required corrective action. ➢ Highstreet to work with UCF, to address any corrective actions.	MS Word

Ascend Step 4: Development and Expanded Modeling

After our consultants have walked UCF's project team through the business processes in the initial modeling sessions, Highstreet will identify how current processes can be redesigned, in order to optimize the benefits of new applications.

Ascend Step 4: Development and Expanded Modeling Project Plan Phase: Execution and Construction, Monitoring and Controlling Systems Quality Assurance Control Step: Development Review and Ascend Step 4 Project Quality Review		
Activities	Tasks:	Deliverables:
➢ Modification development ➢ Interface development ➢ Report development ➢ Data Conversion Development ➢ Security Design	➢ Develop Solutions ➢ Data conversion ➢ Interfaces ➢ Customizations ➢ Reports ➢ Security ➢ Scheduled Processes ➢ Workflow	➢ Integration Testing Plan ➢ Integration Testing Summary Report ➢ System Testing Plan ➢ System Testing Summary Report ➢ Data Conversion Validation Plan ➢

Ascend Step 4: Development and Expanded Modeling Project Plan Phase: Execution and Construction, Monitoring and Controlling Systems Quality Assurance Control Step: Development Review and Ascend Step 4 Project Quality Review		
Activities	Tasks:	Deliverables:
and Development ➢ Integration Testing ➢ System Testing	➢ Code Reviews ➢ Integration Testing of Business Processes ➢ System Testing of Business Processes	

Data Conversion Development

Highstreet uses the most current toolsets to perform comprehensive Data Conversion, minimizing data errors and orphaned records. Whenever possible, a Component Interface is used to import the data, so that all data checks are performed and all secondary tables populated. This technique has been successfully utilized at multiple institutions.

A process of continuous improvements will be employed, to load data in the Conversion environment. This process allows the technician an opportunity to load the data, using the best tool available for that data. A modular test of the results will ensure that the data has loaded properly. The technician then involves the functional team in reviewing the data; this is a preliminary check of the data, to ensure accuracy. If issues arise, the technician will repair the application or write a new routine, to translate the data further. This process will continue until the Technician and the Functional Team feel confident that the conversion application is ready to move to the next environment. This approach involves the client functional staff at an early stage of the conversion.

The Continuous Improvement process will continue in the Test environment. The Technician will migrate the application to the Testing environment, where the processes will be run again, to populate the environment. This data will then be tested by the Functional Team, using developed test scripts. If there is an issue with the data or the applications, the Technician will move to the Conversion Environment, work through the process, then re-migrate into the Test Environment. Once the Functional Team has determined that the data has converted correctly, the Technician will be given approval to move the application to the new production environment.

The move to production will utilize a script called the Cut-Over Document. This document will outline the steps necessary to migrate the application and the staging tables into the production environment. This document will be used to perform the migration into the UAT environment, which will be a dress-rehearsal for the go-live migration. Once the Technician has completed the conversion in production, the Functional Team will review the environment, to ensure that the process was successful in converting the data, without incident.

Staging

These tables provide an area of preparation, which is an efficient way to speed up the final go-live process. Applications created to perform the actual load of the data will read these tables. The build of the staging tables will be performed by UCF. The import into the new system will be accomplished by one of the following conversion methods.
Conversion Methods

Each of the following methods has been used in conversion, at many institutions. Each method has its pros and cons; selection of the appropriate method will depend on the analysis performed, to ensure the correct method is utilized for the conversion. The final selection could also be a combination of methods.

SQL
Depending on the cleanliness of the data from the legacy system, the use of direct SQL coding may be utilized. Any data transformation or data cleansing would have to be accomplished by the use of SQL processes. SQL Process programming is not as efficient a language as those identified below.

Pros - This method is efficient in speed of conversion processing. Since the procedures and SQL will be executed on the database, there will be no network traffic. The procedures could be effectively parsed, which will add to the efficiency of the overall process. In addition, rules and indexes could be applied, when necessary, to increase processing speed.

Cons - Although this has evolved over the years, using SQL to program complex transformation is not the most efficient use of development time. The more complex algorithms will have to be developed using a higher level programming language. The other disadvantage of this process is data checking. All the data checks will have to be accomplished by SQL. Although not impossible, it is difficult to keep up with the constant changes that are being released in Oracle Bundles. In the course of a conversion, the software may change several times. Each release would have to be analyzed, to ensure product software changes have been taken into account, for that release.

SQR
SQR is a programming language that is built on a layer of SQL, but it is a step above SQL. This language provides the necessary programming logic that allows for limited data checking. Although it is an improvement, it still contains the inherent short falls of SQL.

- Pros - This method is efficient in speed of conversion processing. Since the underlying layer is SQL, the process will initiate a set of calls to the database. This is a common language, for which most institutions have a competent group of developers. The generated code could be kept as a library of functions that could reduce development time.
- Cons - Although SQR has evolved over the years, the language still presents a problem with complex algorithms and the disadvantage of data checking. All data checks will have to be accomplished by SQR functions. Although not impossible, it is difficult to keep up with the constant changes that are being released in Oracle Bundles. In the course of a conversion, the software may change several times. Each release would have to be analyzed, to ensure product software changes have been taken into

account, for that release. The components are quite complex, and there is a chance of missing a secondary table population. This would cause issues with the data display, if records were orphaned in the database. This process is executed by the Application Processor, which is another layer between the application and the data.

Application engine

Application engines are a PeopleSoft programming method that allows a task to be divided into specific steps. The underlying language is PeopleCode which is a high level programming language. The Best Practice is to use the Application Engines with the Component Interface described below.

- Pros - Provides a method to handle complex translations and data clean-up: The PeopleCode language and delivered functions allow rapid development for translations and data clean-up.
- Cons – Using the application Engines will execute the process in an orderly manner, but a significant amount of development will still be necessary, to ensure that the data checking is performed.

Component Interfaces

Component interfaces were developed to allow the data to be processed through a component, without the need for the PIA. It is a set of classes, which allows data to be populated into component data buffers and then saved to the database. The underlying language is PeopleCode, which allows a wide variety of development techniques that can be utilized.

- Pros - Provides a method to handle complex translations and data clean-up: The PeopleCode language and delivered functions allow rapid development for translations and data clean-up. In addition, the Component Interface will populate all the secondary tables associated with the component. The developer will not have to worry about changes that come through the Oracle Bundles, since the Rebuild of the Component Interface will provide correction for the component.
- Cons – The use of Component Interface is, by design, a slow process. Every piece of data is checked, which causes the process to run more slowly than others defined here. However, Highstreet Technicians have devised a process that executes multiple sessions concurrently, thus negating some of the inherent slowness of the process. The use of the Component Interface as a conversion tool requires a good understanding of PeopleCode and the integration points to PeopleSoft. The process development requires skills that may not be available within the client staff.

Testing

The testing of the conversion process begins in the Conversion Environment, where a preliminary check of the data will ensure that the application and the data are ready to move to the next Environment. This also allows the Client Functional Team to get involved, at an early phase of the conversion process. This continuous improvement process will continue until all parties are satisfied with the results in the Conversion Environment.

The Test Environment will be a dress-rehearsal for the Deployment Document, as well as the applications. The data will be imported into the staging tables, and the conversion applications will be run against the data. This will mimic the final load in production, and will test the Deployment Document as well as the PeopleTools projects. The Functional Team will use this environment to completely test the system. If any issues occur in this environment, the Highstreet Technician will return to the Conversion Environment, make any changes, and then re-migrate the project to the Test Environment.

Deployment

The move to production is the last step of the Conversion Process. The actual steps of migrating the data and applications into the Production Environment will be outlined in the Deployment Document. The process of deployment is a consolidated effort between the Highstreet consultants and the client staff. The processes of the conversion applications are usually performed by the Highstreet Technician, but could be performed by the client staff as well. There will be one final check by the Functional Team, once the data has been completely loaded into the new production environment. Once this process is complete, the new production environment is ready for processing.

Post-Production

A good implementation may still have minor issues arise. These will need to be identified, analyzed and corrected, in the most efficient way possible. Keeping the project team intact will ensure smooth resolutions to any issues that arise.

Customization, Interface, Query, Report, Workflow and Communication Development

Highstreet favors an implementation approach with minimal customizations, focusing only on those customizations or bolt-on applications essential to conducting UCF's business, and ensuring that the customizations developed are done so in a way that minimizes long term impact.

Highstreet technical resources follow a concept that has become an industry standard for Oracle|PeopleSoft projects: bolt-on development. A 'bolt-on' is an extension of code, developed such that it does not impact any of the delivered code, and, as such, has a much smaller impact when the code is revised by the software vendor for subsequent versions.
The concept of bolt-on development was not created by Highstreet resources, but our consultants were some of the first to deploy the coding methodology for Oracle|PeopleSoft projects. Highstreet will work with UCF to promote and endorse developments, only when no other reasonable option is available. When customization, interfaces, queries, reports, workflows and communications are identified and approved, Highstreet will work with UCF to create the solutions, following the workflow described below.

Application Development Workflow

The following table represents each of the steps in the project, indicating the individual responsible for each step.

Specifications

Responsible Person / Position	Action Description
Highstreet Functional lead and UCF Functional Lead	➢ Complete the Functional Design Specification form, as appropriate (utilizing the Functional Design Document Template). ➢ Establish a Unit Test to define successful completion of the development effort. (At this point, this can be very general, but will need to be specific before moving to production. This is necessary to enable technical staff to adequately confirm proper operation.)

Responsible Person / Position	Action Description
	➢ Submit the form to the UCF Project Manager for approval.
UCF Project Manager	➢ Approve the Functional Design Specification. ➢ Assign the customization to the Highstreet developer for evaluation and work estimation.
Highstreet Developer	➢ Research the requirements for the customization. ➢ Complete Technical Approach Documentation, including the best guess of effort for the customization required. ➢ Based on the previous step, estimate the development hours required for the customization. ➢ Submit the Technical Approach Document to the UCF Project Manager for review.

Approval

Responsible Person / Position	Action Description
UCF Project Manager	➢ Review the Technical Approach Document summary and hours estimate. ➢ Forward the approved form to the Highstreet Developer.

Development & Testing

Responsible Person / Position	Action Description
Highstreet Developer and Highstreet Function Lead and UCF Functional Lead	Create a test script for the customization, based on the original Unit Test.
Highstreet Developer	➢ Update the Design Specification request with more specifics, as needed and available. In particular, update sections on Record Definitions, SQL, PeopleCode, etc., as it is developed. ➢ Create and test the customization as assigned, creating a project in App Designer, to migrate projects between environments. ➢ Install the project in the test environment.
Highstreet Functional lead and UCF Functional Lead	➢ Test the customization using the test environment. ➢ If required, work with the Developer to fix any identified problems. ➢ When satisfied that the customization is correct and performs the requested actions, notify the Developer.
Highstreet Developer	➢ Make any necessary updates to the Technical Design Document. ➢ Forward the customization to the UCF System Administrator,

Responsible Person / Position	Action Description
	to update security info.
UCF System Administrator	➢ Update the Design Specification form, regarding security. ➢ Forward the customization to the UCF Project Manager, including the project name and description in the email.

Quality Assurance

Responsible Person / Position	Action Description
UCF Project Manager	➢ Review the customization. ➢ Refer it to the UCF System Administrator for security setup and installation in the Quality Assurance database.
UCF System Administrator	➢ Set up security as necessary. ➢ Implement the project in the Quality Assurance (QA) database, when appropriate. ➢ Notify the functional resources that the customization is ready for testing in the QA database.
Highstreet Functional lead and UCF Functional Lead	➢ Test the customization using the QA environment. ➢ If problems are discovered, send back to the Developer for revision. ➢ When satisfied that the customization is correct and performs the requested actions, notify the UCF Project Manager, including the project name and description in the email.

Approval

Responsible Person / Position	Action Description
UCF Project Manager	➢ Review the specifications and change the name of the design specifications, to include the project name at the beginning. ➢ Notify the Highstreet Account Executive that the customization is finished. ➢ When ready for implementation, notify the UCF System Administrator.

Implement in Production

Responsible Person / Position	Action Description
UCF System Administrator	➢ Install the project in the Production database. ➢ Update the Production System Change log. ➢ Move a copy of the project to a secured area. ➢ Notify appropriate staff.

Following this development process has allowed us to develop a number of very successful solutions. Experience has shown that this approach encourages significant, early, and ongoing knowledge transfer, and often minimizes the need for post-implementation support. UCF staff will be engaged from the very beginning and will have an opportunity to review the work, throughout the project, to make sure that the outcome is exactly what is expected.

Access Control (Security)

There are a number of steps required to define the access control for users in Oracle|PeopleSoft. To define the delivered access control in Oracle|PeopleSoft, we must follow a few steps, in a given sequence. Using the Access Control (Security) Strategy as a guide, Highstreet will work with UCF to identify the security requirements which will be used to create the production level security.

Integration Testing

The integrated nature of the Oracle|PeopleSoft system dictates that integration testing happen systematically, throughout the project. Highstreet's methodology forces integration discussions early in the project, and integration testing across the major system touch points is identified as a separate test cycle. Integration between systems (e.g. Payroll and General Ledger) and within the Oracle|PeopleSoft Suites (e.g. Time and Labor to Payroll) is documented and tested during this cycle. Prior to beginning Integration Testing, Highstreet will work with UCF to define the entrance criteria for Integration Testing, using the Testing Strategy as a guide.

System Testing

It is important to recognize that a system test for a packaged system solution has a slightly different focus than that of a custom solution. The focus will be on testing the business processing used by UCF. This test will string together a number of business processes or events, and test them both independently and 'end to end', and will be run in an environment similar to a production-ready environment, with production data volumes. Some integration testing naturally occurs during the system test, but its primary focus is the successful completion of each business process about to be deployed in production. Prior to beginning System Testing, Highstreet will work with UCF to define the entrance criteria for System Testing using the Testing Strategy as a guide.

Ascend Step 4: Deliverable Definition Table

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
13	Data Conversion Validation Plan	The data conversion validation plan defines: the entrance criteria for the start of data conversion validation, defines what tools will be used to validate	➢ Plan articulates the scope of data conversion validation, through each conversion cycle. Includes the population size and variation in population that	➢ Highstreet leads the test plan creation process using Highstreet test plan templates. ➢ UCF participates in planning sessions. ➢ UCF identifies and documents needed testing scenarios, based on types of predictable business transactions. ➢ Highstreet will document draft	MS Word

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
		data, the process that will be followed to validate data, and how issues will be reported.	needs to be validated. ➢ Plan articulates entrance criteria, stating what needs to be in place, for validation to begin. ➢ Plan articulates how data will be in each of the conversion cycles, specifying if it is an automated validation or manual validation, and who will be performing the validation. ➢ Plan articulates the schedule of when validation activities will occur. ➢ Plan articulates how issues identified are documented.	plan and will incorporate all client feedback. ➢ Highstreet will review draft plan with Project team for feedback, prior to submitting for approval.	
14	Integration Testing Plan	The integration testing plan defines: the entrance criteria for the start of integration testing, what will be tested, and how issues will be reported.	➢ Plan articulates the scope of integration testing with entrance criteria, stating what needs to be in place, for integration testing to begin. ➢ Plan articulates what will be tested, including reference to supporting test scripts and scenarios. ➢ Plan articulates the schedule of when testing activities will	➢ Highstreet leads the test plan creation process, using Highstreet test plan templates. ➢ UCF participates in planning sessions. ➢ UCF identifies and documents needed testing scenarios, based on types of predictable business transactions. ➢ Highstreet will document draft plan and will incorporate all client feedback. ➢ Highstreet will review draft plan with Project team for feedback, prior to submitting for approval.	MS Word

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
			occur. ➢ Plan articulates how identified issues are documented.		
15	Integration Testing Summary Report	The integration testing summary report summarizes issues identified and what was tested.	➢ Summary report will articulate testing that has occurred, based on planned scope. ➢ Summary report to summarize the defects found in the testing process. ➢ Summary report will identify plans to resolve findings and the timing of when the defect will be retested for positive resolution.	➢ Highstreet will document draft summary report and will incorporate all client feedback. ➢ Highstreet will review draft summary report with Project team for feedback, prior to submitting for approval. ➢ UCF will work with Highstreet to address any defects identified.	MS Word
16	System Testing Plan	The system testing plan defines: the entrance criteria for the start of integration testing, what will be tested, and how issues will be reported.	➢ Plan articulates the scope of system testing with entrance criteria, stating what needs to be in place, for system testing to begin. ➢ Plan articulates what will be tested, including reference to supporting test scripts and scenarios. ➢ Plan articulates the schedule of when testing activities will occur. ➢ Plan articulates how identified issues are documented.	➢ Highstreet leads the test plan creation process, using Highstreet test plan templates. ➢ UCF participates in planning sessions. ➢ UCF identifies and documents needed testing scenarios, based on types of predictable business transactions ➢ Highstreet will document draft plan and will incorporate all client feedback. ➢ Highstreet will review draft plan with Project team for feedback, prior to submitting for approval.	MS Word
17	System Testing	The system testing	➢ Summary report will articulate	➢ Highstreet will document draft summary report and will	MS Word

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
	Summary Report	summary report summarizes issues identified and what was tested.	testing that has occurred, based on planned scope. ➢ Summary report to summarize the defects found in the testing process. ➢ Summary report will identify plans to resolve findings, and the timing of when the defect will be retested for positive resolution	incorporate all client feedback. ➢ Highstreet will review draft summary report with Project team for feedback, prior to submitting for approval. ➢ UCF will work with Highstreet to address any defects identified.	

Ascend Step 4: Milestones

ID	Name	Acceptance Criteria	Responsibilities	Format
04	Step 4: Development and Expanded Modeling	All activities in Step 4, of the Ascend Methodology, have been completed. All identified deliverables have been presented to, and accepted by, UCF	Highstreet to present the Milestone Acceptance Form. UCF to review and approve, or deny with required corrective action. Highstreet to work with UCF to address any corrective actions.	MS Word

Ascend Step 5: User Acceptance Testing and Training

Ascend Step 5: User Acceptance Testing and Training Project Plan Phase: Execution and Construction, Monitoring and Controlling Systems Quality Assurance Control Step: UAT Testing Review and Ascend Step 5 Project Quality Review		
Activities:	Tasks:	Deliverables:
➢ Build Production Environments ➢ Finalize Business Process Documentation ➢ Document processes & procedures ➢ Develop User Acceptance Test Plan ➢ Create test environment ➢ Performance and Load Testing ➢ Conduct User Acceptance Test	➢ Finalize operating procedures ➢ Develop User Acceptance Test Plan ➢ Create test environment ➢ Conduct Performance and Load Test ➢ Conduct User Acceptance Testing	➢ Process Schedule ➢ Functional Operating Procedures ➢ User Acceptance Testing Plan ➢ User Acceptance Testing Scenarios ➢ User Acceptance Testing Summary Report ➢ Performance and Load Testing Summary Report

User Acceptance Testing

User Acceptance Testing (UAT) is the final testing step, before rolling out the new or changed software application or function. The end user(s) who will be using the application will test it before 'accepting' that the application meets the business requirements. Therefore, it can be seen as the most important form of testing, since it is the step that determines whether or not a piece of development is "fit for purpose" and can be put into productive use.

The focus here is the functionality and usability of the application, rather than the technical aspects. It is assumed that the application would have already undergone Unit, Integration and System Level Testing. The User Acceptance Testing must be carried out in an environment that closely resembles the real world or production environment. This applies to setup and transactional data, as well as the user access profile.

Before the User Acceptance Testing can be done, the change/function must be fully developed. Various levels of testing (Unit, Integration and System) will already have been completed, before User Acceptance Testing is performed. As various levels of testing have been completed, most of the technical bugs should already have been fixed before UAT. The developer and the Business Analyst should be satisfied that the development works and meets requirements, before handing it over for UAT.

The software must be tested in a real world situation, using real world data and scenarios, and the system access that an end user would have. Test cases/scenarios should be developed using the functional request, the functional specification, and input from the business analysts, regarding typical cases. In addition to testing that the software does what is required, testing should also ensure that it cannot be used to do something that should not be possible. Where this happens, it is often a case of incorrect security having been assigned.

The steps taken for User Acceptance Testing typically involve the following:

- Planning the test
- Designing User Acceptance Test (UAT) Cases
- Selecting a Team that would execute the (UAT) Test Cases
- Performing the testing
- Documenting the testing, including any defects found
- Re-testing, if necessary
- Signing Off

Highstreet will start with the User Acceptance Test Catalog below and work with the UCF Project Team to identify all Test Script and Test Scenarios, to address all the required UA Test Cases, which support business processes at UCF.

There are three common UAT test case approaches:

- Requirements-based test cases
- Business process-based test cases (workflow), or user scenario-based test cases
- Data driven test cases

Requirements-based test cases

Writing test cases based on the business requirements, that were documented earlier through discovery and fit/gap is the traditional and most common approach to test cases writing. This approach helps capture test scenarios directly from the discovery and fit/gap. However, if test cases are written only based on the business requirements, then there are risks of carrying over the defects or missing things between the requirements and the test cases. Also, there is the chance that the requirements themselves are incomplete, incorrectly specified or outdated, and in such cases, the test cases would also be incomplete, incorrect or outdated.

Business process-based test cases

One of the most critical concerns in any system deployment is that the system will not work, immediately after deployment, to support the user's workflow or business processes. Business process validation through "Business process-based test cases" helps ensure that business processes are supported by the application or system that was delivered.

Data driven test cases

Data driven test cases are typically created as extensions of other types of acceptance test cases described earlier. Data that is external to the functional test cases is loaded and used to extend those test cases.

Highstreet recommends incorporating a combination of the three approaches, discussed above, in writing effective acceptance test cases.

Scope:		All future state business processes within the scope of the project, including all internal and external integration points (interfaces).
Roles & Responsibilities	Test Definitions:	All testing scenarios, scripts, and cases will be developed by the module-specific functional consultant and client business analysts.
	Test Performance:	All testing will be performed by the UCF's business users.
	Test Approval:	All tests require approval by the UCF's Business Owners.
Exit Criteria:		All customizations work as designed.
Testing Environment:		FN92XXX

Tying Test Cases to one or more Requirements ensures traceability.

Process Schedule

To complete a full business process, there are a number of dependent processes that must be run, to achieve the desired output. Jobs can be run ad hoc, scheduled within PeopleSoft or with Third Party products. Highstreet will lead the UCF project team through the process of identifying required jobs as well as the correct configuration required to successfully run those jobs with the output required to support the

business process. Highstreet will work with UCF to create a comprehensive list of jobs, with the needed run schedule to support production needs.

Performance and Load Testing

The expectation for performance testing is that it measure and analyze application and system responses to various user load scenarios, against defined business processes, in preparation for the initial go-live. Load testing will be executed against the most recent hardware and software copies of the production system.

Additionally:

- Testing will measure and verify application response, using the latest applications versions, customizations, interfaces, workflows and system intensive reports.
- The hardware platform used in testing is expected to become the eventual production platform for the initial CS/PA implementation.
    - Testing will produce a system load that represents both process and number of the type of load expected during UCF's busiest system usage day of the year (i.e. first class day of the Fall semester, for Universities).
    - This load will be based on data obtained from the current legacy system and maximum concurrent users the system has been able to handle.
- Expected concurrent users at peak periods at the go-live.
- Test scenarios will be developed, based on business processes defined by the Functional Team, in collaboration with subject matter experts.
- Test scenarios will be designed to simulate the defined peak number of users, executing transactions within Oracle|PeopleSoft defined business process, to match a production scenario as closely as possible.

Training and Knowledge Transfer

Knowledge Transfer is a process, not an event. Highstreet's expertise, backed up by research findings, would indicate that stepping outside of the single-event model is the only viable means of reliable knowledge transfer. As such, it starts with a well-designed communication model that prepares each student for the changes that they are expected to make.

The transfer itself occurs under a blended approach, using both online and in-class components. The amount of in-class components varies by user. This can range from a broad seminar, for as little as 1 hour, to a 5-day course. Some users may be required to take multiple 5-day courses, based on their responsibilities. However, all of the content is repeatable for the user; there are replays available.

Finally, each user is supported by 1 or more —often many more—Job Aids and supporting documentation. The Job Aids focus on the primary flow and the most common exceptions. These are backed up by both custom-developed documentation and user access to the complete Oracle libraries.

Highstreet provides knowledge transfer, in multiple ways, throughout the course of the project. Our consultants work alongside your campus staff, to demonstrate, explain, train, and document all project requirements. Examples of knowledge transfer would include:

- Readiness Assessment Sessions and supporting documentation

- Working alongside campus staff to configure and test system setup
- Provide written documentation of functional and technical specifications
- Provide guidance with the development of training manuals/aids, as defined in the project scope
- Provide guidance with approaches to training, using a 'train the trainer' approach
- Development of conversion programs and documentation of upgrade steps, for campus technical staff

For UCF, we are envisioning a 'train the trainer' approach. After learning the system by working on the project, the UCF trainers would be capable of leading the development and delivery of end user training. The design philosophy recommended is a blended approach, using a tailored mix of instructor-led classes, synchronous and asynchronous e-learning, job aids, and performance support systems. The following are our assumptions:

- Done correctly, research clearly demonstrates that all modalities--instructor-led, synchronous, and asynchronous--are equally effective for knowledge transfer and learning. Highstreet's experience is used to tailor these approaches to each subset of the user community, and to develop high quality learning content, regardless of the delivery method.
- Materials are developed for targeted user communities. These include processes, identified by business owners, by user role.
- The training content explains the functionalities and processes to users, through discussions, demonstration, hands-on activities and walkthroughs.
- Hands-on activities allow users to practice what they have just learned, increasing the retention rates and reducing time to proficiency.
- Ample time will be provided for questions during and after the end of each session, through live Q&A sessions or social media techniques. These sessions add to the growing body of competency for the institution.
- Classes range from 3 to 4 hour sessions to 5-day classes. Maximum class size is set to 24, so that every participant receives the necessary attention.

Ascend Step 5: Deliverable Definition Table

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
18	Process Schedule	Detailed inventory of all Oracle|PeopleSoft process scheduler jobs that need to be run, to support business processing in Production.	➢ Approved template has been completed, with all sections completed.	➢ Highstreet to provide first draft of all possible process schedule jobs that might be necessary to support business process. ➢ Highstreet will review and articulate the purpose of each process, and schedule jobs with UCF. ➢ Highstreet and UCF to define parameters required, to schedule and run jobs successfully.	MS Excel
19	User Acceptance Testing Plan	The user acceptance testing plan defines: the entrance criteria for the start of integration testing, what will be tested,	➢ Plan articulates the scope of integration testing, with entrance criteria stating what needs to be in	➢ Highstreet leads the test plan creation process, using Highstreet test plan templates. ➢ UCF participates in planning sessions. ➢ UCF identifies and documents needed testing scenarios, based	MS Word

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
		how issues will be reported.	place, for integration testing to begin. ➢ Plan articulates what will be tested, including reference to supporting test scripts and scenarios. ➢ Plan articulates the schedule of when testing activities will occur. ➢ Plan articulates how identified issues are documented.	on types of predictable business transactions. ➢ Highstreet will document draft plan and will incorporate all client feedback. ➢ Highstreet will review draft plan with Project team for feedback, prior to submitting for approval.	
20	User Acceptance Testing Scenarios	Final inventory of all client-defined testing scenarios that will be executed during User Acceptance Testing. Serves as the final exit criteria, prior to the readiness assessment	➢ Inventory of scenarios have been documented and included, as a part of the User Acceptance Testing plan.	➢ Highstreet to lead workshops to identify testing scenarios. ➢ UCF to identify and document scenarios in approved templates.	MS Word and MS Excel
21	User Acceptance Testing Summary Report	The User Acceptance Testing summary report summarizes issues identified and what was tested.	➢ Summary report will articulate testing that has occurred, based on planned scope. ➢ Summary report to summarize the defects found in the testing process. ➢ Summary report will identify plans to resolve findings, and timing of when the defect will be retested for positive resolution.	➢ Highstreet will document draft summary report and will incorporate all client feedback. ➢ Highstreet will review draft summary report with Project team for feedback, prior to submitting for approval. ➢ UCF will work with Highstreet to address any defects identified.	MS Word

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
22	Functional Operating Procedures	Documentation created by training team is to be validated against testing activities.	➢ Operating procedures produced by training team have been validated by User Acceptance Testing participants.	➢ If training materials are the responsibility of Highstreet, Highstreet will document the Functional Operating Procedures using the approved tools, identified in the Change Management and Training Strategy. ➢ If training materials are the responsibility of UCF, UCF will document the Functional Operating Procedures using the approved tools, identified in the Change Management and Training Strategy. ➢ UCF is to provide adequate staff to validate Functional Operating Procedures, as well as complete User Acceptance Testing activities.	MS Word
23	Performance and Load Testing Summary Report	Plan that articulates how the project team plans to measure and analyze application and system responses to various user load scenarios, against defined business processes, in preparation for the initial go-live.	➢ Plan articulates what test scenarios will be executed, as a part of testing. ➢ Plan articulates the numbers of users that will be simulated. ➢ Plan articulates what environments will be tested. ➢ Plan articulates how results will be analyzed and used, to tune the Oracle|PeopleSoft environments to be tested, ➢ Plan articulates what is not included as a part of the testing process.	➢ Highstreet to provide recommendations of transaction scenarios that should be executed ➢ UCF to provide concurrent user load counts to be used for testing ➢ Highstreet to provide guidance on concurrent user load counts ➢ If Highstreet is responsible for Performance and Load Testing, Highstreet will perform tests and produce summary report. ➢ If UCF is responsible for Performance and Load Testing, UCF will perform tests and produce summary report. ➢ If Highstreet is responsible for environment and database tuning, Highstreet will perform tuning. ➢ If UCF is responsible for environment and database tuning, UCF will perform tuning.	MS Word

Ascend Step 5: Milestones

ID	Name	Acceptance Criteria	Responsibilities	Format
05	Step 5: Planning and Needs Assessment Complete	➢ All activities in Step 5, of the Ascend Methodology, have been completed. ➢ All identified deliverables have been presented to, and accepted by, UCF.	➢ Highstreet to present the Milestone Acceptance Form. ➢ UCF to review and approve, or deny with required corrective action. ➢ Highstreet to work with UCF to address any corrective actions.	MS Word

Ascend Step 6: Deployment and Stabilization

After the hard work completed in the first four phases, the effort and time invested begin to yield fruit. The Highstreet and UCF team will review the progress made and the results of the testing that have occurred. Upon reviewing the results, to satisfaction, and mitigating any remaining issues, a plan will be made to migrate to production.

Ascend Step 6: Deployment and Stabilization Project Plan Phase: Execution and Construction, Monitoring and Controlling Systems Quality Assurance Control Step: Readiness Assessment and Ascend Step 6 Project Quality Review		
Activities:	Tasks:	Deliverables:
➢ Training approach & methodology ➢ Develop training plan ➢ Develop training curriculum ➢ Conduct Training ➢ Create & communicate Help Desk processes ➢ Go-Live Activity Plan ➢ Assess system readiness ➢ Decision to Go Live ➢ Post-Go-Live	➢ Finalize Training Plan ➢ Communicate Training Schedule ➢ Finalize Training Material ➢ Conduct Training ➢ Create Help Desk ➢ Training Assessments ➢ Develop cut over plan ➢ Develop contingency plan ➢ Execute cut over plan ➢ Setup Process Scheduler Jobs	➢ Training plan ➢ Training Materials ➢ Help Desk Procedures ➢ Training Feedback ➢ Cut Over Plan ➢ Readiness Assessment

Training Plan

The training plan is developed through the course of the project. In Ascend Step 6, the plan is formally communicated to the UCF stakeholder, in preparation of delivery of training. By this time, all supporting curriculum and training material has been created, class schedules have been established, and the registration process has been defined.

Training Materials

Highstreet' associates are well-versed in many development tools, with a specific emphasis on Oracle's User Productivity Kit (UPK). However, there are times when this tool is not enough. In those cases, Highstreet IT has expertise in the primary tools, including those from both Adobe and Articulate.

Documentation is primarily delivered through UPK .odarc files, both archived and kept on a UPK server. Additionally, all of the contributing files, including Word documents, web pages, PowerPoint files, graphics (.jpg, .gif, and .png), along with any other developed or archived, will be kept in both production and backup versions.

Cut Over

Highstreet will work with UCF to define a cut over schedule for move to production, to support each of the first processing runs in Production. A detailed plan will be developed, so that we do not miss any critical steps that might prevent a successful go-live.

Readiness Assessment

Circling back to the discoveries made in the Needs Assessment, Highstreet, in conjunction with the UCF project team, will document the current readiness status of all business processes. The documentation will outline the successes of testing, as well as any outstanding issues, and the plan to mitigate any issues that may affect UCF. The Readiness Assessment documentation will be presented to the Executive Steering Committee, for final review and disposition. Final Acceptance is required, to begin the execution of the cut over plan, for the final move to production.

Sustainment Period

Many Consulting companies will setup and deploy Oracle|PeopleSoft, without planning for any continued support in future processing. However, we understand the importance of successfully conducting day to day business; in our typical pricing proposal, Highstreet resources are dedicated, on site, for a number of months after go live. During the project, our team will work with their UCF counterparts to ensure that the appropriate mechanisms for help desk support, the application of updates & fixes, and migration of customizations are all in place to ensure a smooth period of stabilization, after the project is complete. It is important to us that your first experiences with Oracle|PeopleSoft are positive. It is also equally important that you get enough time with our consultants, in the sustainment period, to learn how to support and run the system, allowing you to be self-sustaining after we have completed our engagement.

Project Success

The ultimate measure of the value Highstreet can bring to UCF lies within our consultants' track records. Highstreet's competitive advantage is deeply rooted in the principles that were present when our company was founded: We focus on delivering high quality results, while transferring expert Oracle|PeopleSoft application knowledge, in each project effort. This focus drives our Ascend Methodology, and will be evident in every aspect of executing our consulting agreement with UCF.

Highstreet takes tremendous pride in creating success for higher education clients. We select only first-rate consultants, who have extensive track records of exceeding expectations. To date, we have a 100% project success rate.

Ascend Step 6: Deliverable Definition Table

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
24	Training Materials	All documentation and aids required to train identify end users	➢ All training material for approved scope has been completed. ➢ Training Material has been validated by UCF.	➢ If Highstreet is responsible for training activities, Highstreet will document the training plan. ➢ If UCF is responsible for training activities, UCF will document the training plan.	MS Word
25	Training plan	Plan is formally communicated to the UCF stakeholders, in preparation of delivery of training.	➢ Plan articulates training options for the end user community, by business process. ➢ Plan articulates scheduled training times for each in-class training option, by business process. ➢ Plan articulates audience that will require end user training, by business process.	➢ If Highstreet is responsible for training activities, Highstreet will document the training plan. ➢ If UCF is responsible for training activities, UCF will document the training plan. ➢	MS Word
26	Help Desk Procedures	Documentation that will guide help desk personnel through troubleshooting and the resolution escalation process.	➢ Help Desk Procedures have been documented. ➢ Help Desk Procedures have been circulated to Help Desk Staff.	➢ If Highstreet is responsible for creation of Help Desk Procedures, Highstreet will document the Help Desk Procedures. ➢ If UCF is responsible for creation of Help Desk Procedures, UCF will document the Help Desk Procedures.	MS Word
27	Training Feedback	Training participants are surveyed, to assess the effectiveness of training.	➢ Training Feedback has been solicited, after training has occurred, for each session. ➢ Training Feedback has been	➢ If Highstreet is responsible for delivering training, Highstreet will solicit and summarize training feedback. ➢ If UCF is responsible for delivering training, UCF will solicit and summarize training feedback.	MS Word

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
			summarized in a summary report. ➢ Summary report has been submitted to Executive Steering Committee for review.		
28	Cut Over Plan	The cut over plan articulates the step by step tasks that need to occur, to successfully move all project work completed, to production.	➢ Detailed project plan has been created, detailing all tasks needed to move project work to the production environment. ➢ Project plan will have duration, start and end time, and resource assignment. ➢ Project plan has been reviewed by all individuals assigned as resources. ➢ Communication plan has been produced, articulating how to communicate progress or lack of progress during cut over.	➢ Highstreet will create the project plan. ➢ UCF participates in the plan creation and review process. ➢ UCF will provide the required resources, to execute cut over activities. ➢ Highstreet will provide the required resources, to execute cut over activities.	MS Project
29	Readiness Assessment	The readiness assessment document articulates the current status of readiness, of all business processes.	➢ Readiness assessment document has been created, for each high level business process. ➢ Readiness Assessment document articulates status of completion, of each dependent	➢ Highstreet will produce the draft of the readiness assessment, based on the approved template. ➢ Highstreet and UCF project team members will participate in keeping the status of readiness current. ➢ Highstreet will present final draft to the Executive Steering Committee. ➢ Executive Steering Committee will decide readiness to begin cut over activities, to go live.	MS Word

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
			item required, to successfully execute business process in production. ➢ Readiness Assessment document accurately reflects that status, based on UCF and Highstreet project team members input. ➢ Readiness Assessment document has been presented to the Executive Steering Committee for review, question and answer, and final disposition.		

Ascend Step 6: Milestones

ID	Name	Acceptance Criteria	Responsibilities	Format
06	Step 6: Planning and Needs Assessment Complete	➢ All activities in Step 6, of the Ascend Methodology, have been completed. ➢ All identified deliverables have been presented to, and accepted by, UCF.	➢ Highstreet to present the Milestone Acceptance Form. ➢ UCF to review and approve, or deny with required corrective action. ➢ Highstreet to work with UCF to address any corrective actions.	MS Word

Ascend Step 7: Project Closure

Ascend 7: Project Closure Project Plan Phase: Completion Quality Assurance Control Step: Project Quality Review & Client Satisfaction Survey		
Activities:	Tasks:	Deliverables:
➢ Project Lessons Learned ➢ Final QA Assessment ➢ Validation of all Deliverable and Milestone Acceptance	➢ Assessment Sessions to gather Lessons Learned	➢ Project Acceptance Signoff

Project Lessons Learned and Final QA Assessment

Prior to submitting Milestone approval documents for Project Acceptance, Highstreet will conduct a Lessons Learned final QA Assessment, to validate that all work is complete and that there are no major issues preventing signoff. The final report will be presented in conjunction with the Milestone Acceptance Document.

Ascend Step 7: Deliverable Definition Table

ID	Name	Description	Acceptance Criteria	Responsibilities	Format
30	Project Lessons Learned and Final QA Assessment	➢ Final QA interview, to reflect on the success of the project and validate that there are not any outstanding project issues.	➢ Project Lessons Learned and Final QA Assessment Sessions have occurred. ➢ Project Lessons Learned and Final QA Assessment Document has been submitted.	➢ Highstreet will document all lessons learned, as identified by project team members and executive steering committee members interviewed. ➢ UCF validates accuracy of all produced documentation, and works with Highstreet to resolve defects. ➢	MS Word

Ascend Step 7: Milestones

ID	Name	Acceptance Criteria	Responsibilities	Format
07	Project Acceptance	➢ All activities in Step 7, of the Ascend Methodology, have been completed. ➢ All identified deliverables have been presented to, and accepted by, UCF	➢ Highstreet to present the Milestone Acceptance Form. ➢ UCF to review and approve, or deny with required corrective action. ➢ Highstreet to work with UCF to address any corrective actions.	MS Word

Highstreet Upgrade Methodology

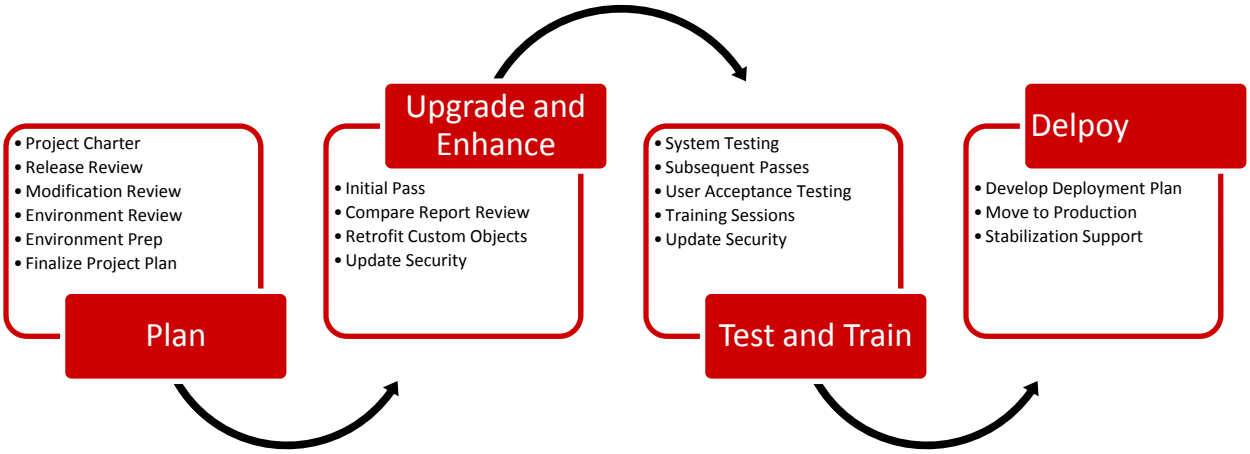
Highstreet's upgrade methodology is founded on a sound, classical system upgrade model, which has been tuned for speed and flexibility. This promotes consistency and familiarity of process to facilitate superior results.

The methodology is based on several critical concepts:

- Solid planning to establish clear roles and responsibilities and project milestones;
- Functional user participation in all phases of the process;
- Continual knowledge transfer resulting in client self-sufficiency;
- Emphasis on delivered functionality and reduced modifications; and

- Multiple testing stages and test cycles to ensure appropriate quality control.

The following graphic addresses the major task activities associated with the project stages.



Plan

The objective of the planning phase is to establish the project framework to prepare all participants for what will come in subsequent phases.

Project Charter

The Project Charter sessions will be used to establish the project scope and goals as well as establish the project management approach. The project management approach will detail important activities like the identification of issues and risks as well as an escalation process for challenging events that cannot be addressed by the members of the project team. The Project Charter will articulate the roles and names of key team members on the project as well as defining the project scope, governance, project controls, and project strategies that will be utilized during the project. The effort required to complete the Project Charter is typically short in duration. Highstreet will start with a best-practice framework tailored to your organization.

Release Review

Every new release of your Oracle/PeopleSoft product includes changes that affect your organization. The objective of the Release Review is to educate your organization on changes in the Oracle/PeopleSoft product from your current release to the target release. These sessions are designed to be quick. Successful sessions will identify key functionality that will require attention during each upgrade pass. This preparation allows for a seamless integration of new and former functionality when the upgrade goes live. Unlike "Fit/Gaps" your organization may have experienced while implementing your first product, we are

not expecting to find many—if any—new gaps. We expect to find old gaps that required modifications or bolt-on applications that could not be addressed with delivered functionality.

The Release Review will also include a review of any new functionality introduced by Oracle/PeopleSoft since your current release. After reviewing the scope, any functionality that would benefit or enhance your organization's business processes will be identified. These will be shared with project sponsors to determine which new functions should be included in the project scope and when such functionality should be deployed. Under certain circumstances, the configuration of new functionality is too great to occur concurrently with the other work required in the upgrade process.

Highstreet recommends that your organization use the Release Review process as an opportunity to revisit business processes and existing customizations. It is to your organization's advantage to reduce the total number of customizations in the system during any full upgrade because this makes subsequent maintenance easier.

Modification Review

The Release Review process will identify some modifications to the system but not all areas of the Oracle/PeopleSoft product changes in each release. There will be some system modifications that will still need to be identified. This inventory should include all custom objects, modifications and bolt-on applications as well as any interfaces, reports or queries that have been developed in the system. Better understanding the work that will need to be retrofitted and tested allows better preparation for mapping the remaining work in the project plan.

Environment Review

The Environment Review will involve a Highstreet upgrader reviewing the current status of the environments to be upgraded. Oracle/PeopleSoft upgrade scripts make certain assumptions about the release start point. Highstreet will review the current releases and identify the environment preparation required before beginning the upgrade process. The Highstreet upgrader will review the schedule of bundles between project start and the desired deployment date. Any bundles that must be applied to the source environment will be known in advance and built into the project plan. After the Initial Pass is completed, Highstreet will work with your organization's staff to apply any required bundles to that environment. It is important that the source and target environments are maintained at the same bundle release level throughout the process.

Depending on the overall schedule of the upgrade, bundles and/or critical patches/fixes may need to be applied to the current production environment. These must also be applied to either the target release demo environment, the target release Initial Pass environment, or both, depending on the status of the upgrade. The application of such bundles and/or critical patches/fixes will be reviewed, coordinated and agreed upon by the Highstreet upgrader and your organization which may result in the need for additional test moves.

Environment Preparation

After the Environment Review, the Highstreet upgrader will work with your organization to prepare the environment. This may require activities like applying bundles or patches to your current release to bring it up to the minimum release level required by Oracle/PeopleSoft for a successful upgrade. Should this requirement be identified prior to beginning the engagement, this would also be the time that any architectural changes are made to your environment. This may include the build out of new servers or the introduction of any new load balancers.

Finalize Project Plan

The preceding activities culminate in finalizing the Project Plan. Highstreet will start from the baseline upgrade plan that outlines this methodology, as well as any tailoring done as a part of the proposal process. We will update the baseline plan with the new information identified in the planning phase. This plan will incorporate the estimated time needed for the retrofitting of identified modifications and interfaces as well as any special consideration for training and change management that may be needed for new business processes identified in the Release Review. The finalized Project Plan will guide Highstreet and your organization to the successful deployment of your upgrade. The finalization of the Project Plan will include a review of your organization's desired deployment date.

2. Upgrade and Enhance

Initial Pass and Compare Report Review

In the Initial Pass, the Highstreet upgrader will perform the first run of upgrade scripts against your production environment. Compare reports are then run between your current Production Database and the target release demo database. The compare report will identify the database objects that will need to be reviewed, added and/or deleted from the current production environment. Many of the objects identified will match the inventory of items identified in the modification review process in the planning phase. This will provide a final process to find any orphaned object that your organization may no longer be using. Highstreet will review the findings in the compare report with your organization's upgrade team to finalize the list of work that may be adjusted in the project plan. Once the initial pass begins, no other enhancements should be made to the current production environment. Any enhancements made during this "freeze" period will need to be reapplied to the final upgrade environment after the project has been completed.

Retrofit Custom Objects

After the Initial Pass has been completed and the compare reports have been reviewed, the Highstreet development team and your organization's development team will begin retrofitting and reapplying the custom objects needed in the new target release database.

Update Security

Initial review and update of any known security changes will be made to the system. As a part of the Oracle/PeopleSoft upgrade documentation, there may be security updates that need to be made prior to release, that will address the addition or removal of functionality in the target release of your Oracle/PeopleSoft product. Highstreet will work with your organization's security administrators to make the appropriate changes to the database.

3. Test and Train

System Testing

After the Initial Pass has been completed, modification and interfaces have been reapplied and any known security issues addressed, the Highstreet upgrade team and your organization's upgrade team will begin to do initial testing of your current business processes in the upgraded environment. This will focus on testing the business processes used by your organization, given your existing test cases and scenarios. This test will string together a number of business processes or events and test them independently as well as 'end to end'. The goal is to update testing documentation with changes introduced in the upgraded release as well as to identify issues that need to be resolved prior to the next pass. System testing will continue between each subsequent pass until we get to User Acceptance Testing, which will be the final testing phase before the move to production upgrade pass.

Subsequent Passes

Additional Subsequent Passes (typically three) will be performed to verify that issues in the system testing have been resolved, that data has been upgrade/migrated properly, that the custom developments (including application customizations, reports and integrations) being moved to the new release will perform properly, and to establish and refine deployment timing.

User Acceptance Testing

The object of this process is for the functional team to execute their business processes in the test environment to ensure that the target release of your Oracle/PeopleSoft application performs as expected. Each process that your organization uses on a daily basis must be tested in the target release and the results verified.

User Acceptance Testing will be a controlled process that requires careful planning and execution. After review and modification of your current test cases and test scripts, the test steps are executed. These should include on-line sessions to enter the test data, running the appropriate batch processes and reports, obtaining test output, reviewing the results, and either approving the results or completing a problem sheet and re-testing, as necessary.

Several test forms will be used to facilitate the User Acceptance Testing process and to ensure uniformity and completeness. The Prototype Test Case Worksheet will be used to identify each test, the title, navigation, and expected and actual results. The Test Log will be used to document and track test cases. The Problem Report and Problem Log will be used for problem identification and resolution. The Highstreet consulting team will work with your organization's upgrade team to perform user acceptance testing and resolve identified issues.

Update Security

As security issues are identified throughout the system testing process, the Highstreet consulting team will work with your organization's security team to apply appropriate permission changes to the system that meet your organization's needs. The objective of this activity is not to reinvent your organization's security structure, but to adjust the security as needed to align with your business process, as they relate to the new or revised functionality that was delivered by Oracle/PeopleSoft since the current release of your production environment.

Training Sessions

During the technical upgrade passes, the Highstreet Functional team will work with your organization's functional and training team on the best approach to communicate the changes in functionality that will affect your user community. Based on these discussions, the Highstreet team will assist your organization with preparing any documentation and—when necessary—drafting training session outlines to be used in training sessions. The training sessions should occur throughout the User Acceptance Testing phase.

4. Deploy

In the Deployment Phase, all the hard work becomes a reality.

Develop Deployment Plan

The Highstreet upgrade team will work with your organization's upgrade team to document the exact steps that need to occur to successfully execute the move to production. The steps do not mimic those in the upgrade passes done previously because there is real production impact with this pass. Communications need to be drafted and processes need to be adjusted to accommodate the delivery of the upgraded system. The plan will be drafted, reviewed and approved prior to beginning the final move to production.

Move to Production

Both Highstreet and your organization's upgrade team will follow the deployment plan as a guide to execute the final move to production. After all steps have been executed and the functional resources have done a final signoff on the successful move to production, the organization's communication team will send out a celebratory communication to your user community notifying them of the all-clear for production use.

Stabilization Support

Highstreet will provide any level of support that your organization desires as a part of the stabilization support period. The objective of the upgrade is for the move to production to be a "non-event" with very few, if any issues arising. The only way to ensure this level of success is to do a good job of testing your organization's business processes in the testing phases throughout the upgrade. Some organizations recognize their challenges with testing and request that Highstreet be there for them as a safety net, for support during this critical period.

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

Response:

Below are the consultant categories that Highstreet can provide upon request to UCF. We have provided an all-inclusive rate range which includes consulting costs and travel expenses for each of these categories. Because Highstreet has a very large number of local Florida resources, we are able to provide lower rates to UCF for our local resources compared to our standard rates for resources that are located out of area. Highstreet will strive to dedicate local resources to each of UCF's projects whenever possible to help minimize the costs to the university as well as allow the university to benefit from the added convenience of a resource that is nearby at all times.

Resource	Rate Range
PeopleSoft Project Management	$145 - $175
PeopleSoft Campus Solutions Functional	$140 - $170
PeopleSoft Human Capital Management Functional	$135 - $165
PeopleSoft Financial Management Suite Functional	$135 - $165
PeopleSoft Grants Suite Functional	$145 - $185
PeopleSoft Campus Solutions Technical	$135 - $165
PeopleSoft Human Capital Management Technical	$130 - $160
PeopleSoft Financial Management Suite Technical	$130 - $160
PeopleSoft Technical Trainer	$135 - $165
PeopleSoft Functional Trainer	$135 - $165
Oracle Database Administration	$135 - $165
Redhat Server Administration	$130 - $160
PeopleSoft Security	$140 - $170
PeopleSoft UPK Development	$125 - $155
PeopleSoft End-User Software Training	$135 - $165
PeopleSoft Interaction Hub (Portal)	$145 - $175

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

Response:

Highstreet has provided rates that are all-inclusive of all travel expenses and incidentals while onsite. Should the University request remote work for any projects, Highstreet can provide lower off-site rates for any of our consultants in order to minimize costs to the University. Should UCF choose to utilize any of our local Florida consultants in an off-site capacity, Highstreet ensures that each local resource will work from the Highstreet office located in Lakeland, Florida, and each consultant will be under the supervision of the local Highstreet Account Manager, Meg Phillips as well as the local Highstreet Vice President, Lisa Moore.

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

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

Response:

The Highstreet team has been providing System Administration and Database Administration support to our clients for many years. We have a seasoned team of Technical System Administrators and Database Administrators who have been a part of the Highstreet team for as long as we have been providing these services. Below is a sampling of some of the recent and/or current System Administrator and Database Administrator functions that Highstreet has performed for various colleges, universities and companies throughout the years including the system architecture details, year(s) the work was completed, application release(s), and brief description of Highstreet's role in relation to System Administration and/or Database Administration. For each of the projects below, the Highstreet resource who performed this work, is still a part of our team today. Additionally, each of the examples below were performed by local central Florida based resources who are still living in the central Florida area within an hour's drive from the University of Central Florida.

Client	Year	PS Release	RDBMS	OS	Description
Northern Arizona University	2006 2010 2011 2014 (current)	PT 8.48/8.49/8.53 HR/CS 8.9/9.0 HR 9.2 FSM 9.1 PA 9.1	Oracle 9, 10, 11g	RH Linux MS Windows	Installed software infrastructures for upgrades for HR/CS, new installs for Financials/Portal; Each pillar has 9 non-prod environments (27 total); 3 production environments; PA not live yet; Technical upgrade support and troubleshooting; patches/updates/configurations;
City of Clearwater	2012 – 2013	PT 8.50 – 8.53 HR 9.1	Oracle 11g	MS Windows	Upgraded PeopleTools, configured Database fixes, Automated refreshes of Database, included 1 development instance and 1 production instance
University of Puget Sound	2011-2013	PT 8.52 HR 9.1 CS 9.0 FSM 9.1	Oracle 11g	RH Linux MS Windows	Installed and maintained entire PS software infrastructure, ultimately 21 non-prod environments, 3 production environments; configured, patched, troubleshooting, DBA support and training; Primary DBA/PSA/SYS Admin, trained incoming DBA/PSAs;
University of Florida	2003-2004	PT 8.46/8.4	IBM DB2	AIX/DB2 MS	Technical and Security; Installed and configured initial implementation servers for

Client	Year	PS Release	RDBMS	OS	Description
	2010-2011	9/8.53 HR 8.9/8.3/ 8.9 FSM 8.0/8.4/ 9.0 SA 8.0/8.9 PA 8.0/9.1	Oracle 10g, 11g	Windows RH Linux	PA/HR/SA/FSM; provided PS Admin support including patches/fixes/updates for multiple non-prod environments; Assisted with upgrades, reconfigurations; App Messaging and IB configurations; 16 non-prod environments, 4 production environments;
National Park Community College	2009 - 2011	PT 8.49 HR 9.0 FSM 9.0 CS 9.0	MS SQL Server	MS Windows	Cloned environments and trained new System Administration staff members; included 4 non-production environments and 1 production environments
Universal Technical Institute	2008-2009	PT 8.49 FSM 9.0	MS SQL Server	MS Windows	Installed software infrastructures for Financials implementation; configured patched, troubleshooting for 4 non-prod environments, 1 production environment;
Anderson University	2008	PT 8.48 HR/CS 9.0 FSM 9.0	Oracle 11	RH Linux MS Windows	Technical and Security; Installed software infrastructures; configured, patched, troubleshooting for 8 non-prod environments, 2 production environments;
Miami Dade County	2007-2008	PT 8.46 HR 8.9 FSM 8.8	Oracle 10g	AIX MS Windows	Staff augmentation – PeopleSoft Systems Admin; 12 non-production environments, 2 production environments; configured servers, applied patch/fixes, maintained security, batch processes, troubleshooting;
Watkins Motor Lines	2004-2006	PT 8.46 HR 8.3/8.8 FSM 8.8	IBM DB2 Oracle 10	AIX MS Windows	Technical and Security support; configured servers, processes, managed server processes; upgrade support; custom security support; 2 production environments, 8 non-prod environments;
Darden Restaurants	2002-2003	PT 8.43 HR 8.0	Oracle 9 MS SQL Server	MS Windows	PS Administrator and DBA support; initial install/configuration of MS servers; DBA support, PS Admin including install/config/patches/fixes/troubleshooting; 4 non-prod environments, 1 production environment;

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

Response:

On each of our PeopleSoft implementations, our technical resources work on third party interfaces such as NelNet, Enrollment Manager, TD Client, CashNet/Higher One, Touchnet, Perceptive Software/Image Now, SPEEDE, CCCApply, DARS, ASSIS, BlackBoard, NetMail, BookLog, TIAA-CREF, Positive Pay for AP and Payroll (with multiple banks), Telescripts, Royalle, Learn More, RoboRegister, UltiPro, ISIRs Loads, Payment Manager, ANGEL Learning Management System, WinPrism, Windstar, various grant systems for student aid and Moodle.

One detailed example of this is the Moodle interface that Highstreet performed for George Fox University. For this project, Highstreet created an interface between Moodle and PeopleSoft to control which courses were available in Moodle. The University's role in the project was to configure a delivered feature of Moodle to query for available courses and configure a database link to PeopleSoft. Highstreet's role was to create configuration pages to select the courses that should be included and to create a single view that Moodle could access for the information. For this project, the University was on PeopleTools v8.50 and Campus Solutions version 9.0. We have listed above some of the third party systems with which we have interfaced. However, this is not a comprehensive list. All of our technical resources are well-versed in the process of specification development and interface development between PeopleSoft and all third party systems. Below is a sampling of some of the clients for which we have integrated with the third party systems listed above. This is not a complete list of all of our clients, but a list of recent Higher Education clients.

Client Name	Number of Campuses	Integrated Third Party Systems
Anderson University	1	Positive Pay for AP and Payroll (with multiple banks)
		TeleScript
		Royalle
		ANGEL Learning Management System
Berkeley College	9	BlackBoard
		NetMail
		Positive Pay for AP and Payroll (with multiple Banks)
		Learn More
		UltiPro (Payroll)
		WinPrism (Bookstore)
		ISIRs Loads (inbound files for Financial Aid)

Client Name	Number of Campuses	Integrated Third Party Systems
Bowling Green State University	1	TD Client
		DARS
George Fox University	1	Moodle
		Positive Pay for AP and Payroll (with multiple banks)
National Park Community College	1	SPEEDE (Electronic Transcripts)
		AASIS (Arkansas State Required Interface)
		NelNet (Student Financials)
		BookLog (Bookstore)
		TIAA-CREF (Retirement/Financial)
		Positive Pay for AP and Payroll (with multiple banks)
		ISIRs Loads (inbound files for Financial Aid)
Peralta Community College District	4	TD Client
		Perceptive Software/Image Now
		CashNet/Higher One
		CCCApply
		RoboRegister
University of Florida	14	Windstar
University of Puget Sound	1	Enrollment Manager
		NelNet
		ISIRs Loads (inbound files for Financial Aid)
		TIAA-CREF (Retirement/Financial)
		Positive Pay for AP and Payroll (with multiple banks)
		Payment Manager (Wells Fargo)

3. Proposers addressing the PeopleSoft application and tools functions as described in section 1.1 above must provide a list of current or very recent clients and projects explaining integrations with third party application and the project scope.

Response:

In Addition to the Database Administration, System Administration and applications work that we did for the projects above, we also provided PeopleTools development on these same projects. On each of our PeopleSoft implementations, our technical resources work on third party interfaces such as NelNet, Enrollment Manager, TD Client, CashNet/Higher One, Touchnet, Perceptive Software/Image Now, SPEEDE, CCCApply, DARS, ASSIS, BlackBoard, NetMail, BookLog, TIAA-CREF, Positive Pay for AP and Payroll (with multiple banks), Telescripts, Royalle, Learn More, RoboRegister, UltiPro, ISIRs Loads,

Payment Manager, ANGEL Learning Management System, WinPrism, Windstar, various grant systems for student aid and Moodle.

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Anderson University	1	Positive Pay for AP and Payroll (with multiple banks)
		TeleScript
		Royalle
		ANGEL Learning Management System
Berkeley College	9	BlackBoard
		NetMail
		Positive Pay for AP and Payroll (with multiple Banks)
		Learn More
		UltiPro (Payroll)
		WinPrism (Bookstore)
		ISIRs Loads (inbound files for Financial Aid)
Bowling Green State University	1	TD Client
		DARS
George Fox University	1	Moodle
		Positive Pay for AP and Payroll (with multiple banks)
National Park Community College	1	SPEEDE (Electronic Transcripts)
		AASIS (Arkansas State Required Interface)
		NelNet (Student Financials)
		BookLog (Bookstore)
		TIAA-CREF (Retirement/Financial)

Client Name	Number of Campuses	Integrated Third Party Systems
		Positive Pay for AP and Payroll (with multiple banks)
		ISIRs Loads (inbound files for Financial Aid)
Peralta Community College District	4	TD Client
		Perceptive Software/Image Now
		CashNet/Higher One
		CCCApply
		RoboRegister
University of Florida	14	Windstar
University of Puget Sound	1	Enrollment Manager
		NelNet
		ISIRs Loads (inbound files for Financial Aid)
		TIAA-CREF (Retirement/Financial)
		Positive Pay for AP and Payroll (with multiple banks)
		Payment Manager (Wells Fargo)

E. Demonstrated Ability to Meet Requested Project Time Lines

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

Response:

Below is a sampling of Highstreet's recent client successes with projects similar to those described in section 1.1 of the UCF ITN.

1. Company Name:	University of Florida (14 Campuses)
Brief Description of Project:	Highstreet has assisted the University of Florida with numerous implementation and upgrade projects throughout the years. We assisted the University with their original PeopleSoft implementation of Financials and HRMS 8.8 and subsequently assisted with their upgrade to 9.1. We have also assisted UF with PeopleSoft Grants, including the development of a one-time data entry page, dubbed "Grants Express" which delivered a method to expedite the time it takes to enter the required information into a Grant. Additionally, Highstreet has provided consultants to the University of Florida to complete intrusion testing and Security. Currently, Highstreet is providing Functional, Technical and Project Management resources to implement Benefits Administration 9.1. Highstreet has been responsible for implementing and/or upgrading the following modules: HR Core, Payroll, Benefits, Benefits Administration, eRecruit, General Ledger, Asset Management, Accounts Payable, Accounts Receivable and Grants.

2. Company Name:	University of Kansas (1 Campus)
Brief Description of Project:	Highstreet is providing Project Management, Technical and Functional leadership to implement release 9.1 of the Oracle/PeopleSoft HCM, Payroll, Benefits, Time & Labor, Absence Management, and Talent Acquisition Manager.

3. Company Name:	National Academy of Sciences (NAS) (1 Campus)
Brief Description of Project:	Multiple HCM upgrade projects. The most recent is the upgrade from 8.9 to 9.1. Using Highstreet's implementation methodology fit/gap sessions were conducted and core HCM processes were modeled and new business opportunities were identified to be included during the upgrade. Some new processes included: expansion of the use of Employee Self Service for ePay, Smart Hire and Final Check Processing. In addition some customized processes

	are being replaced by delivered functionality. With the successful completion of the HCM upgrade, Highstreet has been retained to head up the fit-gap process for the PeopleSoft Time and Labor module.

4. Company Name:	The University of Texas System (15 Campuses)
Brief Description of Project:	Highstreet is providing Project Management, Technical and Functional support to lead the implementation of the Oracle/PeopleSoft HCM and FSM applications to seven of the Texas Systems campuses in a Shared Services Model.

5.. Company Name:	The University of Missouri System (4 Campuses)
Brief Description of Project:	Highstreet has assisted the University of Missouri System with numerous implementation and upgrade projects throughout the years working with 4 Universities as well as 4 hospitals. We have performed fit/gap analysis, development of detailed project plan, conducted all testing including user acceptance training sessions, configuration of the HCM, Benefits, Self Service, Time & Lobor and Talent Acquisition Manager. We also implemented the FMS and CS suite of applications.

6. Company Name:	Washington Metropolitan Area Transit Authority (WMATA)
Address:	1001G St NW Washington DC
Brief Description of Project:	Highstreet is providing PeopleSoft 9.1 functional and technical consulting to upgrade, implement and integrate WMATA's existing human resources systems and functional business processes to accomplish their strategic objective of establishing a single, simple, meaningful enterprise-wide information standard. The project includes the upgrade and implementation of numerous HCM modules, as well as the implementation of EPM.

F. OTHER REQUIREMENTS

A sample copy of UCF's standard contractual agreement, which is the instrument used to bind the contractual parties, can be viewed at http://www.purchasing.ucf.edu. Any concerns with the provisions and clauses of the offered agreement should be addressed during the question and answer period in section 2.2.

Response:

Acknowledged.

G. Response to ITN Appendix

APPENDIX I EVALUATION SCORING SHEET

NAME OF RESPONDENT COMPANY Highstreet IT Solutions, LLC

INSTRUCTIONS TO EVALUATION COMMITTEE MEMBER:

1. Evaluate each offer on a separate form.

2. Work independently and do not discuss the Offers or your evaluation with anyone.

3. When the forms are completed, sign, date and deliver them in a **sealed envelope** to the **Purchasing Representative named in section 2.1.**

Evaluation Criteria	Max Points	Points Awarded
A. Experience and Qualifications in any of the following PeopleSoft applications: Campus Solutions, Human Capital Management, Financials, CRM, Interaction Hub, Mobile, Academic Advising, Oracle Database Administration, PeopleSoft Systems Administration	100	
B. Services Offered	35	
C. Consulting Scope and Cost to University	10	
D. Prior experience with a large complex multi campus Higher Education Institution	35	
E. Demonstrated ability to meet the requested project time lines	10	
F. Conformance to ITN's preferred conditions and requirements (Failure to conform to ITN's mandatory conditions and requirements may result in rejection of proposal) section 2.0	10	
Total Points:	200	
COMMENTS:		

EVALUATOR'S NAME: _____

EVALUATOR'S SIGNATURE _____

DATE _____

APPENDIX II
SUPPLEMENTAL OFFER SHEET
TERMS AND CONDITIONS

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

SECTION	YES	NO	RESPONDENT INITIALS
2.1	X		LM
2.2 **Non-negotiable**	X		LM
2.3 **Non-negotiable**	X		LM
2.4	X		LM
2.5	X		LM
2.6 **Non-negotiable**	X		LM
2.7 Section Not Used	X		LM
2.8 **Non-negotiable**	X		LM
2.9	X		LM
2.10	X		LM
2.11 **Non-negotiable**	X		LM
2.12	X		LM
2.13**Non-negotiable**	X		LM
2.14**Non-negotiable**	X		LM
2.15	X		LM
2.16	X		LM
2.17	X		LM
2.18 **Non-negotiable**	X		LM
2.19	X		LM
2.20 **Non-negotiable**	X		LM
2.21	X		LM
2.22	X		LM
2.23	X		LM
2.24	X		LM
2.25	X		LM

SECTION	YES	NO	RESPONDENT INITIALS
2.26	X		LM
2.27**Non-negotiable**	X		LM
2.28	X		LM
2.29	X		LM
2.30**Non-negotiable**	X		LM
2.31**Non-negotiable**	X		LM
2.32	X		LM
2.33	X		LM
2.34	X		LM
2.35**Non-negotiable**	X		LM
2.36	X		LM
2.37	X		LM
2.38	X		LM
2.39**Non-negotiable**	X		LM
2.40	X		LM
2.41	X		LM
2.42**Non-negotiable**	X		LM
2.43	X		LM
2.44	X		LM
2.45	X		LM
2.46	X		LM
2.47	X		LM
2.48	X		LM
2.49 **Non-negotiable**	X		LM
2.50	X		LM
3.0	X		LM
4.0	X		LM

RESPONDENT COMPANY NAME Highstreet IT Solutions, LL

AUTHORIZED SIGNATURE Lisa A. Moore

TITLE Vice President

DATE June2, 2014

APPENDIX III
CERTIFICATE OF NON-SEGREGATED FACILITIES

We, Highstreet IT Solutions, LLC 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.

SUBPART - CONTRACTOR'S AGREEMENTS

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

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

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

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

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

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

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

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

(7) The contractor will include the provision of Paragraphs (1) through (7) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to Section 204 of Executive Order No. 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase orders the contracting agency may direct as a means of enforcing such provisions including sanctions for noncompliance. Provided, however, that in the event the contractor becomes involved in, or is threatened with,

litigation with a subcontractor or vendor as a result of such direction by the contracting agency, the contractor may request the United States to enter into such litigation to protect the interest of the United States.

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

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

RESPONDENT COMPANY NAME Highstreet IT Solutions, LL

AUTHORIZED SIGNATURE Lisa A. Moore

TITLE Vice President

DATE June2, 2014

APPENDIX IV

COMPLIANCE AND CERTIFICATION OF GOOD STANDINGS

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

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

CERTIFICATION

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

Company: Highstreet IT Solutions, LLC

Authorized Representative's Name: Lisa Moore

Authorized Representative's Signature: Lisa A. Moore

Date: June 2, 2014

Attachment A – Receipt of Addenda

Response:

Highstreet acknowledges that there were no Addenda to ITN 1325 JCSA for ERP Consulting Services.

Attachment B – Proof of Insurance

Response:

Provided on the following page.

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 5/17/2013

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
Van Gilder Insurance Corp.
1515 Wynkoop, Suite 200
Denver CO 80202

CONTACT NAME: Client Manager
PHONE (A/C, No, Ext): 303-837-8500
FAX (A/C, No): 303-831-5295
E-MAIL ADDRESS: certificate@vgic.com

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : National Fire Insurance of Hartford	
INSURER B : Continental Casualty	
INSURER C : The Continental Insurance Company	
INSURER D :	
INSURER E :	
INSURER F :	

INSURED
HIGIT
Highstreet IT Solutions, LLC
4643 S. Ulster Street, Ste. 800
Denver CO 80237

COVERAGES **CERTIFICATE NUMBER:** 2008951423 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	**GENERAL LIABILITY** X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE X OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: X POLICY PRO-JECT LOC			C5093379522	5/10/2013	5/10/2014	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG E&O Agg*	$1,000,000 $1,000,000 $5,000 $1,000,000 $2,000,000 $2,000,000 $5,000,000
A	**AUTOMOBILE LIABILITY** X ANY AUTO ALL OWNED AUTOS SCHEDULED AUTOS HIRED AUTOS NON-OWNED AUTOS			C5093379519	5/10/2013	5/10/2014	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$1,000,000 $ $ $ $
B	X **UMBRELLA LIAB** X OCCUR **EXCESS LIAB** CLAIMS-MADE DED X RETENTION $ 10,000			C5093379486	5/10/2013	5/10/2014	EACH OCCURRENCE AGGREGATE	$5,000,000 $5,000,000 $
C C	**WORKERS COMPENSATION AND EMPLOYERS' LIABILITY** ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y / N: N **(Mandatory in NH)** If yes, describe under DESCRIPTION OF OPERATIONS below	N / A		C5093379505 (CA) C5093379536 (AOS)	5/10/2013 5/10/2013	5/10/2014 5/10/2014	X WC STATU-TORY LIMITS OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	 $1,000,000 $1,000,000 $1,000,000
B	Commercial Crime incl. Employee Theft of Client Property while on Client Premises			TBD	5/10/2013	5/10/2014	$1,000,000	Per Occ

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

*Errors & Omissions Liability - $1,000,000 Each Claim / $5,000,000 Annual Aggregate; $100,000 Deductible.
Auto Comp/Collision Deductible - $1,000 each.
RE: Operations of the Named Insured. Evidence of Insurance coverage.

CERTIFICATE HOLDER

For Information only
..
.. .. ..

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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Attachment C- Florida Business Certificate

Response:

Provided on the following page.

June 21, 2013

FLORIDA DEPARTMENT OF STATE
Division of Corporations

HIGHSTREET IT, LLC.
4643 S ULSTER ST SUITE 800
DENVER, CO 80237US

Qualification documents for HIGHSTREET IT SOLUTIONS, LLC doing business in Florida as HIGHSTREET IT, LLC. were filed on May 16, 2013, and assigned document number M13000003944. Please refer to this number whenever corresponding with this office.

Your limited liability company is authorized to transact business in Florida as of the file date.

This document was electronically received and filed under FAX audit number H13000110291.

To maintain "active" status with the Division of Corporations, an annual report must be filed yearly between January 1st and May 1st beginning in the year following the file date or effective date indicated above. If the annual report is not filed by May 1st, a $400 late fee will be added.

A Federal Employer Identification Number (FEI/EIN) will be required when this report is filed. Contact the IRS at 1-800-829-4933 for an SS-4 form or go to www.irs.gov.

Please notify this office if the limited liability company address changes.

Should you have any questions regarding this matter, please contact this office at the address given below.

Carolyn Lewis
Regulatory Specialist II
Registration/Qualification Section
Division of Corporations Letter Number: 513A00015583

WRITTEN CONSENT TO ADOPT ALTERNATE NAME FOR USE IN THE STATE OF FLORIDA

We, the undersigned, do hereby certify that we are the Managers and/or Managing Members of Highstreet IT Solutions, LLC
(Name of Limited Liability Company)

a limited liability company duly organized and existing under the laws of Delaware
(State or Country of Organization)

Because the name of this foreign limited liability company does not satisfy the requirements of the s. 608.406, F.S., the limited liability company hereby adopts the following name to transact business in the state of Florida:

Highstreet IT, LLC
(Name to be used by limited liability company in Florida. NOTE: Name must end with Limited Liability Company, L.L.C., or LLC.)

Date: 06/18/2013

Signature(s) of Manager(s) and/or Managing Member(s):

CR2E122 (7/07)

CR2E027 (9/10)

COVER LETTER

TO: Registration Section
Division of Corporations

SUBJECT: Highstreet IT Solutions, LLC
Name of Limited Liability Company

The enclosed "Application by Foreign Limited Liability Company for Authorization to Transact Business in Florida," Certificate of Existence, and check are submitted to register the above referenced foreign limited liability company to transact business in Florida.

Please return all correspondence concerning this matter to the following:

Janice Waggoner
Name of Person

Highstreet IT Solutions, LLC
Firm/Company

4643 S Ulster St., Ste 800
Address

Denver, CO 80237
City/State and Zip Code

janice.waggoner@highstreetit.com
E-mail address: (to be used for future annual report notification)

For further information concerning this matter, please call:

Janice Waggoner at (720) 228-4150
Name of Person — Area Code & Daytime Telephone Number

MAILING ADDRESS:
Division of Corporations
Registration Section
P.O. Box 6327
Tallahassee, FL 32314

STREET ADDRESS:
Division of Corporations
Registration Section
Clifton Building
2661 Executive Center Circle
Tallahassee, FL 32301

Enclosed is a check for the following amount:

☐ $125.00 Filing Fee ☐ $130.00 Filing Fee & Certificate of Status ☐ $155.00 Filing Fee & Certified Copy ☐ $160.00 Filing Fee, Certificate of Status & Certified Copy

APPLICATION BY FOREIGN LIMITED LIABILITY COMPANY FOR AUTHORIZATION TO TRANSACT BUSINESS IN FLORIDA

IN COMPLIANCE WITH SECTION 608.503, FLORIDA STATUTES, THE FOLLOWING IS SUBMITTED TO REGISTER A FOREIGN LIMITED LIABILITY COMPANY TO TRANSACT BUSINESS IN THE STATE OF FLORIDA:

1. Highstreet IT Solutions, LLC
(Name of Foreign Limited Liability Company; must include "Limited Liability Company," "L.L.C.," or "LLC.")

Highstreet IT, LLC
(If name unavailable, enter alternate name adopted for the purpose of transacting business in Florida and attach a copy of the written consent of the managers or managing members adopting the alternate name. The alternate name must include "Limited Liability Company," "L.L.C," "LLC.")

2. Delaware
(Jurisdiction under the law of which foreign limited liability company is organized)

3. 46-2499428
(FEI number, if applicable)

4. 04/03/2013
(Date of Organization)

5. Perpetual
(Duration: Year limited liability company will cease to exist or "perpetual")

6. 05/01/2013
(Date first transacted business in Florida, if prior to registration.)
(See sections 608.501 & 608.502 F.S. to determine penalty liability)

7. 4643 S Ulster St., Ste 800

Denver, CO 80237
(Street Address of Principal Office)

8. If limited liability company is a manager-managed company, check here ☐

9. The name and usual business addresses of the managing members or managers are as follows:

Mac Slingerlend 4643 S Ulster St., Ste 800, Denver, CO 80237

Janice Waggoner 4643 S Ulster St., Ste 800, Denver, CO 80237

10. Attached is an original certificate of existence, no more than 90 days old, duly authenticated by the official having custody of records in the jurisdiction under the law of which it is organized. (A photocopy is not acceptable. If the certificate is in a foreign language, a translation of the certificate under oath of the translator must be submitted.)

11. Nature of business or purposes to be conducted or promoted in Florida: IT Consulting Services

Janice Waggoner
Signature of a member or an authorized representative of a member.

(In accordance with section 608.408(3), F.S., the execution of this document constitutes an affirmation under the penalties of perjury that the facts stated herein are true. I am aware that any false information submitted in a document to the Department of State constitutes a third degree felony as provided for in s.817.155, F.S.)

Janice Waggoner
Typed or printed name of signee

CERTIFICATE OF DESIGNATION OF REGISTERED AGENT/REGISTERED OFFICE

PURSUANT TO THE PROVISIONS OF SECTION 608.415 or 608.507, FLORIDA STATUTES, THE UNDERSIGNED LIMITED LIABILITY COMPANY SUBMITS THE FOLLOWING STATEMENT TO DESIGNATE A REGISTERED OFFICE AND REGISTERED AGENT IN THE STATE OF FLORIDA.

1. The name of the Limited Liability Company is:

Highstreet IT Solutions,LLC

If unavailable, the alternate to be used in the state of Florida is:

Highstreet IT, LLC

2. The name and the Florida street address of the registered agent and office are:

C T Corporation System
(Name)

1200 South Pine Island Road
Florida Street Address (P.O. Box NOT ACCEPTABLE)

Plantation FL 33324
City/State/Zip

Having been named as registered agent and to accept service of process for the above stated limited liability company at the place designated in this certificate, I hereby accept the appointment as registered agent and agree to act in this capacity. I further agree to comply with the provisions of all statutes relating to the proper and complete performance of my duties, and I am familiar with and accept the obligations of my position as registered agent as provided for in Chapter 608, Florida Statutes.

C T Corporation System

By: James D. Martin
Asst. Vice President
(Signature)

$ 100.00	Filing Fee for Application
$ 25.00	Designation of Registered Agent
$ 30.00	Certified Copy (optional)
$ 5.00	Certificate of Status (optional)

Delaware

The First State

I, JEFFREY W. BULLOCK, SECRETARY OF STATE OF THE STATE OF DELAWARE, DO HEREBY CERTIFY "HIGHSTREET IT SOLUTIONS, LLC" IS DULY FORMED UNDER THE LAWS OF THE STATE OF DELAWARE AND IS IN GOOD STANDING AND HAS A LEGAL EXISTENCE SO FAR AS THE RECORDS OF THIS OFFICE SHOW, AS OF THE FOURTEENTH DAY OF MAY, A.D. 2013.

AND I DO HEREBY FURTHER CERTIFY THAT THE ANNUAL TAXES HAVE NOT BEEN ASSESSED TO DATE.

Jeffrey W. Bullock, Secretary of State

5314121 8300

130581323

AUTHENTICATION: 0432340

DATE: 05-14-13

You may verify this certificate online at corp.delaware.gov/authver.shtml

Attachment D – Resumes

Response:

Provided on the following page.

Name: Tim G.

Role: Technical Consultant

Overview

A technology professional with over 16 years of PeopleSoft experience, Tim has a proven record of performance in the areas of Security Analysis and Design, Infrastructure, Network Analysis, Product Development, Design, Implementation, Configuration, Installation and ongoing support. With a strong background in PeopleSoft Functional Security, TCP/IP, LAN/WAN protocols, MS Network Security, routing and switched environments, he has successfully installed and configured PeopleSoft HRMS/Campus Solutions Versions 8.0, 8.3, 8.8, 8.9, 9.0, 9.1 and PeopleSoft Financials Version 8.0, 8.4, 8.8, 9.0, 9.1. PeopleTools 8.1x and 8.4x code lines including 8.50. Tim also has thorough knowledge of all MS Windows platforms, including SQL Server database, and is a solid performer in the area of troubleshooting and resolution

Key Qualifications

- 16 Years of PeopleSoft experience in the areas of Security Analysis and Design, Infrastructure, Network Analysis, Product Development, Design, Implementation, Configuration, Installation and ongoing support
- Successful installation and upgrades of PeopleSoft HRMS/CS and Financials v. 8.0, 8.4 and 8.8, 9.0, 9.1 and HCM v. 8.3, 8.8, 8.9, 9.0, 9.1
- Strong verbal and written skills which include project management from initial design to final implementation and testing

Skills Overview

Hardware:	➢ IBM-COMPAQ-HP PC ➢ IBM RS-6000 ➢ HP 9000 800/900/T500 ➢ HP 1000 ➢ Data General ➢ DEC Alpha	**Operating Systems:**	➢ UNIX-HPUX 9.0, 10.0 ➢ IBM AIX ➢ Windows NT, 2000, XP ➢ Sun Solaris 8
Languages:	➢ PeopleCode ➢ Oracle PL/SQL ➢ PeopleSoft SQR ➢ HTML	**RDBMS:**	➢ Oracle ➢ MS Access ➢ DB2/Unix ➢ SQL-Server
Industry Applications:	➢ Financials ➢ Payroll ➢ e-Recruit ➢ Human Resources	➢ Benefits ➢ Portal ➢ Security ➢ Time and Labor	

Professional Experience

University of Puget Sound

Date: Nov 2011 – Present

Role: Technical Lead/Security Design/Development

- Responsible for managing technical development team for implementation of PeopleSoft Financials 9.1, HCM 9.1, Campus Solutions 9.0, Portal 9.1, EPM 9.1
- Installed and configured environment infrastructure for PeopleSoft implementation, Hyperion implementation, UPK implementation

Highstreet IT Solutions, LLC ©
8480 E. Orchard Rd.
Suite 6200
Greenwood Village, CO 80111
Main # 303.802.5200
Fax# 303.802.5201

- Responsible for design, configuration and implementation of all security related aspects for PeopleSoft, Hyperion, UPK include permission list and role design, user provisioning, single sign-on and interfaces to external systems
- Performed PeopleSoft System Administration (PSA) tasks for 25 instance environments on Linux RH 6.0, Windows 2008, Oracle RDBMS including initial installations, patches and updates
- Responsible for design and configuration of Integration/Interfaces between multiple PeopleSoft applications, Hyperion, UPK, legacy and 3rd party applications
- Configured Integration Broker synchronization between HRMS 9.1, CS 9.0 and Financials 9.1 including one-way synchronizations between Financials, HRMS and Campus Solutions as well as bi-direction synchronizations between the 'split' environments of Campus Solutions 9.0 and HRMS 9.1
- Configured integration between PeopleSoft Time & Labor and the B-COMM time clock application in support of badge swipes for time clock punches
- Managed and performed migrations in support of development work for PeopleSoft applications
- General troubleshooting using SQL tools, Application Designer, SOAP-UI in support of production go-live and ongoing items as required

City of Lakeland

Date: Sep 2011 – Nov 2011

Role: Technical Upgrade Consultant

- Provide go-live support for upgrade from PeopleSoft HRMS 8.9 to HRMS 9.1
    - Troubleshoot and resolve security issues as necessary
    - Troubleshoot and resolve Integration Broker issues as necessary
    - Troubleshoot and resolve performance issues as necessary
    - Provide support team training in Integration Broker configuration, performance monitoring, performance tuning
- Reviewed and assisted with Strategy documents for Reporting, Security, Integrations/Interfaces

University of Minnesota

Date: Aug 2011 - Sep 2011

Role: Technical Scribe

- Participated in Delta Fit-Gap Discovery sessions for Accounts Receivables and Billing Processes
- Documented Fit-Gap items discovered during Fit-Gap sessions

Northern Arizona University

Date: Feb 2011 – Aug 2011

Role: Technical Upgrade Lead & PeopleSoft Administrator

Project 1: Upgrade from PeopleSoft HRMS 8.9 to HRMS 9.0

- Installed and configured new release demo environment
- Installed and configured new release development environments
- Downloaded and applied Required for Upgrade patches
- Configured and ran the Initial Upgrade Pass
    - Troubleshoot and resolved upgrade issues including:
        - Reverse engineered and modified scripts and app engine programs as necessary

        - Opened and managed Customer Service Requests (CSR) with Oracle
- Performed the Initial Upgrade pass from HR/CS 8.9 to HR/CS 9.0
    - Installed and configured Change Assistant utility to be used for the upgrade
        - In some cases provided Oracle with solutions for problems encountered
    - Configured and ran the first Test Move to Production
        - Troubleshoot and resolved upgrade issues
        - Provided training and direction to NAU staff for performing future test moves
    - Updated scripts for automated refresh of environments as well as UNIX shell scripts for managing servers
    - Provided security updates and design input for upgraded environments

Project 2 Implementation of PeopleSoft Financials 9.1

- Installed and configured new release demo environment
- Installed and configured new release development environment
- Configured Integration Broker for communication between FSCM and HRMS
    - Activated Service Operations, Handlers, Routings
    - Created App Packages for handling message response from HSCM to HRMS
    - Configured IB Security
    - Updated Batch and Full Data Rules for IB integration
    - Performed data loads from HR to Finance and Finance to HR using Integration Broker
    - Configured and verified IB setup to use SSL encryption for message traffic
    - Provided training and knowledge transfer for the configuration and support of Integration Broker functionality
- Provided troubleshooting and analysis for impact of NAU customizations in HRMS to the Financials implementation

Project 3 Implementation of PeopleSoft Application Portal 9.1

- Installed and configured new release demo environment
- Installed and configured new release development environment
- Configured Integration Broker for communication between Portal, HRMS and Financials environment
- Activated Related Content functionality in Financials and HRMS environments
        - Related Discussions
        - Related Tags
        - Related Links
- Demonstrated Related Content functionality to implementation team
- Provided training and knowledge transfer for the configuration and support of Related Content Services

City of Lakeland, FL

Date: June 2011

Role: Technical Upgrade Consultant

- Assisting with upgrade process from HRMS 8.9 to HCM 9.1
- Providing direction and support for the upgrade process:
    - Query Access Group mitigations

- Security analysis, design and configuration
- Security migration approaches

University of Florida

Date" May 2010 – Present

Role: Technical Upgrade Lead & PeopleSoft Administrator

- In support of Financials upgrade from 8.4 to 9.1, reviewed existing security Roles and Permissions Lists as well as proposed changes, to consolidate and eliminate over 200 Permission Lists and consolidate Role definitions to a more standards based approach
- Reviewed customized Access Request System and recommended updates to take advantage of PeopleSoft's Integration Broker capabilities for synchronizing changes between PeopleSoft Portal, HRMS, Student Administration, Financials and EPM.
- Provided input for creation and updates to the Security Project Plan for managing the security update process during the upgrade
- Presented presentation on new features available in Financials 9.1 including Feature Security, User Preferences, Process Groups, Online Processing, and Chartfield Security
- Reviewed existing security customizations (field and page level PeopleCode) to determine if new functionality could eliminate the customizations
- Reviewed security testing strategy and instance management issues arising during the upgrade process
- Created custom version of the ALLPAGES permission list to be used by developers and testers in the development environments, removing unnecessary and/or sensitive menu items
- Performed SYSAUDIT/DDDAUDITS and recommended corrective actions based on results of those system audits
- Reviewed non-page permissions standards with respect to Query Access Groups, Process Groups, Process Profiles, Web Libraries, Web Services and Component Interfaces
- Reviewed row-level security setup options in Financials as well as Primary Permission List assignments and processes

Northern Arizona University

Date: Jan 2010 – May 2010

Role: Technical Lead & PeopleSoft Administrator

- Installed and configured PeopleTools 8.50 and PeopleSoft Financials 9.1 on RedHat 5.0
  - Demo environment
  - Development environment
  - Testing environment
- Created Setup Manager project for Grants Management implementation and produced task list for configuration
- Populated setup tables with appropriate data in coordination with functional developers
- Configured Integration Broker for communication with PeopleSoft HRMS/CS 8.9, PT8.48
- Created developer security including roles and permission lists for FSCM 9.1
- Loaded legacy account data into configuration instance
- Created ExcelToCI spreadsheets for component interfaces to be used for uploading legacy data
- Provided technical support and troubleshooting to functional developers as needed
- Coordinated planning for interface development between current PS HRMS/CS systems, Advantage Financials system, and Informatica Data Warehouse system
- Coordinated planning for security development
- Installed PeopleTools Patches .03 and .06 for PeopleTools 8.50 in multiple environments

- Installed and configured EMF hub, downloaded and installed Financials Maintenance Pack 1 (MP1) for FSCM 9.1

Universal Technical Institute

Date: Aug 2008 – Dec 2009

Role: Technical Lead, Security Lead – PeopleSoft Administrator

- Installation and configuration of PeopleSoft Financials 9.0, on PeopleTools 8.49 in Microsoft Windows environment, including virtual as well as actual Windows 2003 servers
- Managed technical development team, including conversion team, as well as providing support for functional development team
- Established PeopleSoft maintenance program including configuration of Change Assistant, application of Maintenance Packs, patches and upgrades to third party software
- Responsible for security configuration and build for Financials 9.0 implementation, including permission lists, role creation, user profile builds, and external authentication configuration (MSAD, LDAP)

Anderson University

Date: Mar 2008 – Aug 2008

Role: Security Lead, Technical Consultant – PeopleSoft Administrator

- Security configuration and build for HRMS/CS and Financials implementation, including Role creation, User Profile builds, external authentication configuration (NDS, LDAP)
- Interface with Functional leads in development and creation of custom roles and permission lists for HRMS, Campus Solutions, and Financials products
- Installation and configuration of HRMS/CS 9.0, Financials 9.0 including Web/App/Batch/File servers on SuSE Linux platforms and ongoing support of development and production infrastructure

Miami-Dade County

Jan 2007 – Mar 2008

Senior Technical Consultant – PeopleSoft Administrator

- Lead PeopleSoft Administrator
- Installed and configured application, web and batch servers for both production and development environments for Financials 8.8 and HRMS 8.9 in AIX environment
- Provided change management processes for moving development changes into the production environments
- Supported weekly refreshes of staging environment from production, including creating scripts for automating process
- General troubleshooting of production issues
- Assisted in creation of clustered WebLogic implementation for e-Recruit solution, including configuration of DMZ environment, and reverse proxy servers
- Configured and managed Integration Broker for custom application message environments from Financials to HRMS

Northern Arizona University

Date: May 2006 – Nov 2006

Role: Senior Technical Consultant – Upgrade

- Lead technical consultant responsible for hands-on installation, configuration and performance of upgrade job for upgrade of HR 8.0 to HR 8.9

- Researched, downloaded and applied Required-for-Upgrade patches to upgrade environment
- Ran Move-to-Production passes of upgrade with Change Assistant, creating and modifying steps and scripts as necessary to improve performance
- Assisted with indentifying and correcting performance bottle-necks during upgrade runs including network configuration, database hardware, server and workstation configuration
- Succeeded in reducing time for upgrade processing from over 132 hours to less than 64 hours during Go-Live weekend

Watkins Motor Lines

Date: Sept 2004 – Apr 2006

Role: Senior Technical Consultant

- Lead technical consultant responsible for hands-on installation of Financials 8.8 along with Initial Upgrade pass and subsequent Move-to-Production runs of the upgrade process for Financials upgrade from 8.0 SP3 to 8.8 SP1
- Installed and configured Environmental Management Framework (EMF) on development and production servers
- Used Change Assistant for managing 8 development and production environments, applying upgrade related patches/fixes as well as Maintenance Packs 3, 4 and 5 for Financials 8.8 SP1
- Lead consultant responsible for developing security roles and permission lists as well as infrastructure support for HCM upgrade and Financials Implementation and subsequent upgrade
- Applied row-level security in Financials for parent corporation being incorporated into existing PeopleSoft Financials including Query Security
- Responsible for installing PeopleTools 8.46 (with patches to 8.46.04), PeopleSoft Financials 8.8 SP1, PeopleBooks 8.46, Environment Management Framework Hub and Agents, Upgrade Assistant and Change Assistant
- Providing Security expertise during upgrade of PeopleSoft HCM from 8.3 to 8.8 as well as installation and configuration issues

City of Lakeland, FL

Date: Sept 2005 – Oct 2005

Role: Senior Technical Consultant

- Assisted with Upgrade for 8.3 to 8.9 upgrade of PeopleSoft HRMS and Payroll
- Lead Consultant for Security during upgrade of PeopleSoft HCM from 8.3 to 8.9

Florida A&M University

Date: Oct 2004 – May 2005

Role: Security Lead Consultant

- Split assignment between two clients in order to provide Security expertise to multiple organizations to maximize client resources
- Responsible for Security review and troubleshooting during implementation of PeopleSoft HRMS 8.8
- Reviewed existing security for production Financials, Portal and Student Administration; made recommendations and implemented changes to reduce inappropriate security access for end users
- Worked with Time and Labor administrator in order to incorporate Dynamic Groups into security framework for HRMS

- Provided individual security administration training to FAMU PeopleSoft security team, as well as Query PeopleTools training
- Created PeopleSoft roles and permission lists for providing and controlling developer access to PeopleTools in development instances as well as production instances
- Created security documentation including HRMS Security Go-Live Checklist to assist security administration team

University of Florida

Date: Mar 2003 – Aug 2004

Role: Security Lead Consultant

- Lead consultant responsible for planning and implementing security for PeopleSoft Portal 8.8, Financials 8.4, HCM 8.8, and EPM 8.8 Implementation in a totally integrated environment utilizing single-sign on technology
- Developed, and trained others to develop, custom roles, permission lists and user profiles necessary for the University's implementation. Managed a team of six individuals, both client employees and consultants that comprised the central Security Administration Team
- Acted as infrastructure support/troubleshooter for implementation teams in support of 42+ PeopleSoft instance environments on IBM DB2/Unix platforms as well as Windows 2000 File and Batch servers
- Assisted with design and implementation of a custom Password Management application developed by the University using PeopleTools that added layered password management functionality to the delivered PeopleSoft applications.
- Designed and implemented an Access Request System (ARS) developed at the University using PeopleTools that provided an online application for requesting menu access and user preferences configuration, enabling roughly 400 department security administrators to route requests to the central security administration team for an approximate population of 32,000 users. Created scripts for automatically processing from 100 to 2,000 requests on a daily basis.
- Assisted with design and implementation of automated process for generating user profiles for new employees and automatically assigning default self-service roles for an integrated platform of Portal, HCM, Financials and EPM using dynamic role assignments as well as custom code.
- Assisted with implementation of App Messaging/Integration Broker across a 5 database environment (HR, FIN, SA, EPM and PORTAL)
- Responsible for utilizing STAT change management software and migrating all development projects and patches/fixes to production environment
- Interfaced and coordinated various functional areas in Financials (Grants, Purchasing, Travel & Expense) and HRC (Time & Labor, Benefits, e-Recruiting) with respect to security configuration requirements and needs
- Assisted with developing and leading security training for campus users
- Overall Subject Matter Expert responsible for handling all security issues for the PeopleSoft Implementation

Various Clients

Date: Nov 2002 – Mar 2003

Role: Security Consultant & Trainer

- Developed and delivered training classes for Application Engine to Fastenal Corporation
- Assisted multiple clients with reviewing their security configuration and preparing for PeopleSoft upgrades

Watkins Motor Lines

Date: July 2002 – Oct 2002

Role: Security Lead Consultant

- Performed a comprehensive security analysis surrounding all aspects of PeopleSoft upgrade from versions 7.5 to versions 8.x for both HRMS and Financials, including PeopleSoft internal security as well as external network and infrastructure security for a mixed environment of Oracle on AIX and Windows 2000 domains
- Assisted upgrade of PeopleSoft HRMS from 7.5 to 8.0 SP3, including development of custom roles, permission lists and user profile configurations
- Provided guidance and training to functional leads for HR Payroll and Benefits as well as Financials AR, AP, AM, GL, and Purchasing modules
- Provided two-day training class for functional users on the methodology and construction of PeopleSoft Security for both the HR and Financial teams

Darden Restaurants

Date: Sept 2000 – July 2002

Role: Infrastructure & Security Consultant

- Developed, configured and implemented 3rd party Single Sign-on solution including integration of Microsoft's Active Directory and LDAP technology for PeopleSoft HRMS v 8.0 SP1, utilizing Netegrity SiteMinder authentication package
- Installed and configured PeopleSoft environments in both Microsoft SQL Server and Oracle 8i on both Windows 2000 server platforms and Sun Solaris UNIX platforms including Web Severs (Apache and WebLogic), Application Servers, Process Scheduler Servers, and DBMS servers in support of 125,000+ employee rollout including employee self-service
- Responsible for researching and applying all PeopleSoft patches and Tax Updates; created patch tracking system in support of development environment that included 16 development instances
- Responsible for troubleshooting issues with PeopleSoft 8 and working as a member of the technical team to troubleshoot SQL and issues within the Oracle 8i environment
- Coordinated documentation for modification specifications including migrations of completed development to test and production environments
- Assisted Client PeopleSoft security manager in development and the application of custom permission lists and roles, including dynamic role assignment and LDAP authentication and role assignments
- Applied PeopleTools Updates from v 8.12 to 8.14 and 8.14 to 8.16
- Assisted Central Computing Division in recovery from Nimda virus outbreak that affected 100+ Windows based servers. Rebuilt/Reinstalled 6 of 14 Windows 2000 servers dedicated to the PeopleSoft project over one weekend in response to virus breakout
- Assisted with performance tuning of production systems once implementation was complete

Various Clients

Date: July 1999 – Sept 2000

Role: Senior Network Engineer

- Managed multiple networks on a variety of Operating Systems and supervised staff of technicians in day-to-day support issues
- Provided network security analysis and design, including both hardware and software solutions for both internal and external protection and configuration

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8480 E. Orchard Rd.
Suite 6200
Greenwood Village, CO 80111
Main # 303.802.5200
Fax# 303.802.5201

- Completed telephony and systems analysis for Pinellas Workforce Development Board in order to reduce expenditures for phone and internet access

Florida Tile Industries

Date: Jan 1995 – July 1999

Role: Manager – Network Systems

- Successfully implemented Y2K upgrade plan for 42 routers in nationwide frame relay network
- Managed PC infrastructure for 40 national locations with over 350 PC's, including leasing program
- Disaster Recovery Team Leader for network infrastructure, user authentication and data security; participated in annual off-site (hot-site) disaster recovery tests
- Designed and implemented LAN/WAN environments for 37 retail distribution locations across the US
- Designed and implemented LAN/WAN environment for new National Distribution Center in Lawrenceburg, KY in 360,000 sq. ft facility, including RF based remote terminals for Inventory Control and Shipping
- Responsible for management of 15 file servers, including Web server, MS Exchange server, and application servers
- Project team member implementing PeopleSoft HR 6.0 and upgrades of PeopleSoft Financials to v 7.5, and PeopleSoft HR v 7.0 – responsible for network infrastructure, client configuration and installation, user authentication and network security
- Successful migration from NetWare 3.12 network operating system to Windows NT 4.0 network operating system
- Configured and installed Windows NT based Web server. Assist in managing content, updates. Manage Raptor based Internet Firewall system including web browsing policy and auditing.
- Manage PC/Network Hardware leasing program with budget of $1.5 million annually
- Completed Microsoft Certification for Systems Engineer
- Completed Microsoft Certifications for MCP Internet Specialist
- Review and select all PC/Network hardware and peripherals in use by the entire enterprise

Florida Tile Industries

Date: Mar 1993 – Jan 1995

Role: Distributed Systems Analyst

- Designed and installed local area network (LAN) in three manufacturing plants, and corporate headquarters (250+ nodes)
- Installed and managed network security systems for user authentication and data security
- Designed and installed Frame Relay wide area network (WAN) connecting manufacturing plants and corporate headquarters
- Reviewed total telecommunications program, consolidating all voice/data services for all national locations (35), resulting in an annual savings of $85,000 to $100,000
- Project manager responsible for replacing old PBX with current Meridian One Opt 61C PBX, including vendor RFP process, configuration, and implementation
- Project Team member providing network infrastructure support for implementation of PeopleSoft Financials v 2
- Began PC leasing program for all PC and network hardware reducing initial outlay costs and reducing obsolescence problem with PC technology

University of South Florida

Date: Feb 1991 – Mar 1993
Role: Senior Telecommunications Specialist II

- Implemented and supported remote campus network with 120+ nodes
- Supported and managed AT&T G1 Definity PBX
- Managed open-use computer lab with 30 PC based workstations
- Installed and managed UNIX based network operating systems
- Managed network security systems including integration of telephone authentication systems
- Supported instructors and professors in computer related coursework

US Navy (6 years active, 11 years reserve - Commander)

Date: 1977 – 1994
Role: Naval Aviator

- Piloted A7E Corsair II, embarked onboard USS Dwight D Eisenhower (CVN-69) during one Indian Ocean cruise, two Mediterranean cruises and one North Atlantic cruise
- Avionics/Armament Division Officer
- Communications Officer
- Naval Control of Shipping Coordinator

Education/Certifications/Training/Presentations

Certifications

1998 – Microsoft Certified Systems Engineer, Microsoft Certified Professional + Internet

Technical Training

- PeopleSoft HRMS Release 8.x – 9.x
- PeopleSoft Security Release 8.x
- PeopleTools Delta Release 8.0 – 9.x
- Payroll Boot camp

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Name: Wei X.

Role: Technical Consultant – HCM - Campus Solution - Financial

Overview

Provided PeopleSoft professional consulting service experience since 1995 with over 3 dozen clients, including public sector and private, domestic and international. Extensive PeopleSoft application functional experience and knowledge of functionality including HCM, Financial, CRM, Campus Solution (CS), Supply Chain & Manufacturing (SCM). Experience in many aspects of the project lifecycle including design and development, conversion, implementation, upgrades, production support, and training. Strong technical skills in software architecture, development, and system integration. International working experience in United States, Australia, China, France, Korea, Vietnam, and Singapore with fluency in Chinese communication and French literacy.

Technical Experience

- **PeopleSoft CRM 9.1** including Helpdesk/Call Center/Support, Sales and Online Marketing, Campus Solution, and BORM.
- **PeopleSoft HCM 9.0/Campus Solution 9.0** including HR, Global Payroll, Workflow, Campus Self-Service, Campus Community, Student Records, Student Financials, Workforce admin, Time and labor.
- **PeopleTools 8.52** development, upgrade, customizations, web services, and 3rd party system integration experience, including **Integration Broker**, EIP, XML, Component Interface, App Engine, Query, SQR, Crystal report.
- **PeopleSoft Financials 9.1** experience including AP, GL, Purchasing, Procure-to-Pay, AM, Expense, PC, Project, costing, and Approval workflow.
- **PeopleSoft SCM 8.4** experience including Order Management (Order-to-Cash), Inventory fulfillment, Shipping and Logistics, Manufacturing Enterprise/Production Planning (Red Pepper EP/PP).
- Computer software design and development experience using UNIX/C/C++.

Professional Detail

CIBER, Inc. **5/2013 - 2014**

University of North Texas (UNT) and UTMB

As a principal technical consultant, designed and developed major functionalities for UNT Campus Solution and online admission project. Developed online admission application (OAA) status search, shown applicant details, applicant academic record including GPA and test scores, checklist completeness, application status, using integration technology AAWS, integration broker and webservices, on PeopleSoft Campus Solution 9.0 and PeopleTools 8.52. Supported UNT HCM/CS split upgrade project.

Supported implementation of UTMB financial aid and online scholarship application.

CSX – Apex IT **01/2013-04/2013**

Lead Consultant, CSX CRM HR Helpdesk 8.9/HCM 9.1 integration. Support integration EIP and CRM data cleanup based on BORM. Developed SQL and app engine for individual contact data update, cleaning and correction.

University of Texas at Arlington – Apex IT **9/2012-12/2012**

Responsible for PeopleSoft Campus Solution 9.0 customization and interface development, including students/prospects data import and data conversions, integration for prospects/candidates update between Campus Solution and CRM, admission data, academic record update.

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Designed and developed dialog to support online marketing requirement and App Engine process to support batch import and load prospect inquiries to CRM. Developed Prospect inquiry forms for graduate and undergraduate admission.

Cedar Crestone – Apex IT **03/2012-09/2012**

Public Employees' Retirement System (PERS) of Mississippi

As lead Consultant, worked on PeopleSoft HCM Pension project for state of Mississippi. Developed customizations on PeopleTools 8..51 using Integration Broker and webservices, with Oracle Fusion Middleware (Enterprise Content Management, ECM). AXF and GenericSOAP. Developed sections for employee Pension on CRM 360 degree view, developed HCM messages for employee pension, benefit, job, payroll from PeopleSoft HCM 9.1.

Verizon, Folsom, CA - Apex IT **5/2011 to 12/2011**

Development and support based on PeopleSoft Financial modules, including AP, GL, Purchasing, AM, Expense, Project Costing, Approval Workflow.

Azusa Pacific University – Apex IT **09/2010 to 03/2011**

As Lead Consultant, developed PeopleSoft customizations on Campus Solution 9.0 and CRM 9.1, including integration between CRM and CS using integration broker to support custom fields sync and profile management. Designed and developed dialog to support online marketing requirement. Developed App Engine process to support batch import and load prospect inquiries to CRM.

Government of South Australia, Adelaide **05/2008 to 06/2010**

Developed customized application based on PeopleSoft CRM 8.9 in support of specific business requirements for DFC and Public Trustee (PT), using PeopleTools 8.49, integrations tools integration broker, XML and Oracle. Developed customizations to support customer sync between mainframe system and PeopleSoft using integration tools and XML. Developed customization for Public Trustree using PeopleSoft Financial based applications include accessing financial information and statement, AP voucher access using integration broker and XML. Developed SQR to generate financial statement and balance sheet based on accounting AP, AR, and GL information.

University of South Australia (UniSA), Adelaide **03/2008 to 05/2008**

Developed PeopleSoft customizations to support UniSA **Campus Solutions 9.0** upgrade implementation, using PeopleTools and Peoplecode 8.49. Redeveloped customizations implemented in 7.6, and retrofit SQRs per revised university requirements.

Griffith University, Brisbane, QLD **09/2007 to 03/2008**

Developed PeopleSoft functions customizations to support Griffith University **HRMS and Campus Solutions 9.0** implementation, using PeopleTools and Peoplecode 8.48, application engine, SQL/SQR. Developed customizations in areas including student personal and health data management, campus Self-Service Faculty Centre and student centre customizations, Student Record transcripts, instructors and advisees components customizations, Student Financials including cashiering payment and Bank Reconciliations, workforce Job Data admin (HR)., Global Payroll (GP) and Absence Management including application package customizations of user list and approval criteria for Approval Workflow

Engine (WF) and PeopleSoft security setup. Developed App Engine to load timesheet and payload for AP. Developed report integration with XML publisher.

Oracle University, Hanoi, Vietnam **08/2007**

Taught 2 courses: PeopleCode and PeopleSoft Application Engine.

Wells Fargo & Company, San Francisco **03/2007 to 07/2007**

Developed PeopleSoft functions to support Wells Fargo Wholesale business operations based on CRM PeopleSoft 8.8, using Peopletools and Peoplecode 8.46, and application engine.

San Francisco State University **01/2007 to 03/2007**

Supported **PeopleSoft Campus Solution & HCM 8.9** upgrade from 8.0, retrofit SQRs from 8.0. Upgraded customizations including Time and labor (T&L), payroll and leave accounting, campus self-service.

Wells Fargo & Company, San Francisco **07/2006 to 12/2006**

Developed PeopleSoft functions to support Wells Fargo accounting and fraud workflow project, based on the **PeopleSoft CRM 8.9** Call center/support module on Oracle platform. Developed components to support accounting adjustment and fraud banker workflow process, using PeopleTools, web services, XML, and PeopleSoft Workflow and Active Analytics Framework (AAF) including defining context, terms, actions, policies. Developed task management as part of workflow process on PeopleSoft 8.9 using **PeopleSoft/Oracle 9.0**.

Bearing Point (Hawaiian Telcom), Denver, CO **01/2006 to 06/2006**

Developed **PeopleSoft CRM 8.9** functions to support the Hawaiian Telcom project. Customized functionalities in modules including Order Capture (RO_CAPTURE), Customer Account (RBT_ACCOUNT), Configured/installed product (RF_INST_PROD), and Application Messaging interface to TIBCO using XML. Developed functions for customer account disconnect, suspend, and resume, and functions for order transactions for configured product changes, including PIC changes.

Wells Fargo & Company, San Francisco **06/05 to 01/06**

Developed PeopleSoft functions to support Wells Fargo AAO/AAF (Auto Account Open/Auto Account Funding) project, based on the **PeopleSoft CRM 8.8** Call center/support module on Oracle platform. Developed component to integrate PeopleSoft to 3rd party system, using PeopleSoft integration broker, web services, application messaging, and XML based on SOAP. Developed functions to support customer deposit workflow that includes account open, funding, and fulfillment.

Lab Safety Supply, Janesville, WI **03/05 to 06/05**

Customized RO_CAPTURE related component, including RO_CAPTURE application package, component, record to support LSS business requirements. Specific requirements include supporting functions for users to be able to convert, clone LSS quotes and/or orders to other predefined capture types (RO_CAPTURE_TYPE), cancel quotes and/or orders with cancel reasons, view product attachment from product link.

Created a configurable search component to support LSS product search, based on PeopleSoft provided objects RB_FILTER and RB_TOOLBAR. Developed pages to support search results display and transferring to product and vendor attributes related pages.
Customized 360 degree application package and related pages to show customer (company or individual consumer) and contact information.

PeopleSoft, Inc., Pleasanton, CA **08/04 to 01/05**

Developed application messages using PeopleSoft 8.4 integration broker, in support of **PeopleSoft CRM 8.8** Sales and Marketing integration with PeopleSoft Financial (FIN) application Psynergy. Developed functionalities in support of customer/company Site update Sync (address, status for company), lead to opportunity conversion, opportunity creation and status update, maintenance opportunity and contract activation, agreement update and maintenance, requisition (REQ) and purchase order (PO) generation.

Wells Fargo & Company, San Francisco **01/04 to 07/04**

Developed components for Wells Fargo Online Claim Tracking System, based on the PeopleSoft CRM 8.4 Support module. Developed PeopleSoft pages, pagelets, components on PeopleTools 8.43 and Oracle platform, to support online bill/payment (BI/AP) claims update, search, and worklist. Developed functions to support claims that are generated from 3rd party systems Checkfree and Metavante via MQ Series, using PeopleSoft Integration Broker, XML and messages. Customized Portal pages using PeopleSoft pagelets, and PeopleSoft Portal technology. Developed functions to support banker competency based claim assignment, based on PeopleSoft Workforce/Worker component and functionality.

NEC Computers, Angers, France **05/2004**

Provided consulting service for this French client, mainly worked on Feasible Plan issues of **PeopleSoft Supply Chain Planning 8.4** module.

DongFeng Citreon Automobile Company, Wuhan, China **10/03 to 01/04**

As a Principal PeopleSoft consultant, provided consulting services to DongFeng Citreon Automobile company, partnered with IBM China implementing PeopleSoft CRM 8.8 Call Center, on PeopleTool 8.4/IBM DB2 platform. Major works include CRM configurations and setups, page customizations, data conversions, and testing. Configured CRM based on business requirement including Product, Customer, Currency, Business Unit, Auto numbering, and business object types. Page customizations include Case, Product, Installed Product, Customer/Company/Contact Create, 360 view, using PeopleTools, Application Packages, including QuickCreate, ToolBars, and Search page configuration. Developed pages and components as customizations in PeopleSoft multilingual (Chinese/English/ French) environment.

Cognex Corporation, Natick, MA **09/03 to 12/03**

As a Principal PeopleSoft consultant, provided solution and delivered customizations to streamline the order fulfillment, inventory (INV), and shipping process on PeopleSoft 8.4/Oracle 8.1.7 platform. Customized shipping issue component and pages to support and streamline shipping for product kit, product kit validation, in PeopleSoft 8.4. Customized Shipping Issue component and material reservation process (COBOL) to streamline customer specific shipping requirement.

Polycom, Inc. , Pleasanton, CA **12/02 to 09/03**

As a technical lead consultant, developed PeopleSoft customizations to support a number of shipping logistics functionalities, on PeopleSoft 8.1/Oracle platform. The functions developed include shipment advanced notice (ASN), customized shipping issue and bill of lading pages to support domestic, international and export packaging documents, including Packing Slip, Bill of Lading (BOL), VIC Bill of Lading (U.S. industry standard), Canadian customs invoice, Export proforma invoice, Certificate of Origin, Shippers Export Declaration (SED).

Rain Bird Corporate Services Co., Glendora, CA **10/02 to 12/02**

As a technical consultant, developed customer specific reports and integration interface data files for sales orders, shipments, inventory, using PeopleSoft 8 App Engine and SQR on MS SQL server.

Intersil Corporation, Palm Bay, FL **08/02 to 02/03**

As a principal PeopleSoft consultant, provided solution to streamline the integration based on the merger/acquisition, on PeopleSoft 8.1.6/Oracle platform. Developed PeopleSoft 8 Application Engine programs, using PeopleSoft 8 EIP functions and integration tools, to convert and load production data, including Vendor, Items, and Purchase Orders (PO), into PeopleSoft system. Used PeopleSoft sourcing workbench, requisition (REQ) to PO process, Procure-to-Pay (P2P) and AP.

MediBank, Melbourne, Australia **03/02 to 06/02**

As a technical consultant, partnered with PeopleSoft Australia, implementing PeopleSoft CRM 8.1 to support medical insurance membership enrollment process, on PeopleSoft 8.1.4/IBM DB2 platform. Developed messages and publication/subscription Peoplecode to communicate with IBM legacy system and MQ Series XML. Developed Peoplecode to end/receive/validate data from IBM legacy system and create/update BORM based PeopleSoft tables to complete business enrollment process.

Vitria Technology, Sunnyvale, CA **02/02 to 03/02**

Provided PeopleSoft technical consultancy service. PeopleSoft 8.1 Application Messaging and EIP.

PeopleSoft, Inc. **09/96 to 05/01**

As a Sr. Professional Service Consultant (PSC), provided consulting services to PeopleSoft customers, domestic and international, large and small, public and private. Analyzed business requirements and functional specification, worked closely with customer to understand PeopleSoft functionality gap, generate technical design spec from functional and customization requirements. Provided technical expertise in PeopleSoft development and customizations on PeopleSoft product modules, including order management (OM), billing (BI), purchasing (PO and eProcurement), payables (AP), inventory (INV), enterprise planning (EP/PP), order promising (OP), and asset management (AM), using PeopleTools, PeopleCode, App Engine, PeopleSoft Integration tools, PeopleSoft Application Messaging, Component Interface, SQL/SQR, VB, SPL, C/C++. Customer examples follow.

Guess?, Inc., CA PeopleSoft Financial 8.1 implementation.

Verio, Inc., TX	PeopleSoft 7.5 Order Management implementation
CKE CA	PeopleSoft 7.5 financials, SCM implementation
Serta Mattress Co, CA	PeopleSoft 7.5 Order Management inventory implementation.
Headway Technologies, CA	PeopleSoft 7.5 Supply-chain implementation.
Micron Technology, Inc., ID	PeopleSoft 7.5 Order Management implementation.
NEC, CA	PeopleSoft 7.5 Supply-Chain Management implementation.
Amkor Technology, AZ	PeopleSoft 7.0 Manufacturing Planning implementation.
Sun Microsystems, CA	PeopleSoft 7.0 Manufacturing Planning implementation.
Samsung Display Devices, Korea	PeopleSoft 7.0 Manufacturing Planning implementation.
Bausch & Lomb, NY	PeopleSoft 7.0 Manufacturing Planning implementation.
3Com Corporation, CA	PeopleSoft 7.0 Manufacturing Planning implementation.
Coors Brewing Company, CO	Red Pepper/PeopleSoft Manufacturing planning implementation
Western Digital, CA	PeopleSoft 7.0 Manufacturing Planning implementation.

Independent Software Development Consultant **02/95 to 09/96**

Specializing in software development in client-server environment, using UNIX/C/C++. Business examples follow.

Red Pepper Software Company, San Mateo, CA (acquired by PeopleSoft, Inc.)
Hewlett-Packard Company, Palo Alto, CA
Sun Microsystems, Mountain View, CA

TRW Financial Systems, Inc. **05/93 to 02/95**

Managed the design and development of large-scale, high performance, financial document imaging system. Specific tasks include system architecture design, software design, and implementation for the real-time, multi-processor image capturing subsystem. Experienced in multi-platform client/server software development and management on Solaris, VxWorks, Microsoft Windows NT. Implementation techniques include multi-threading, real-time kernel VxWorks, TCP/IP,DCE RPC, Visual C++/MFC.

Litton/IA Corporation **09/91 to 05/93**

Sr. Software Engineer

Developed and delivered a number of customized distributed document imaging systems. Developed decoding processes for the ASN.1 encoded complex objects using C++. Developed the client/server multi-threaded application processes for Exabyte 8mm tape drive and Ricoh desktop scanner on SunOS 4.1, specific tasks including Sun RPC, X/Motif GUI, SCSI device driver integration, OCR, TIFF and CCITT Group 4 compression. Developed and delivered a VME bus based real-time multi-processor system using VxWorks 5.0.

Exp Group, Inc. **07/90 to 09/91**

Software Engineer

Integrated a distributed client/server ECO system on SunOS 4.1 using UNIX/C, X/Openwin, and SYBASE.

Name: Wei X.

Role: Technical Consultant – HCM - Campus Solution - Financial

Education/Professional Training

M.S. in Computer Science, SUNY at Albany, NY, 1987
M.Eng. in Computer Science, Wuhan University, China, 1985.
B.S. in Computer Science, Wuhan University, China, 1982.

Name: Pradeep R.

Role: Technical Consultant – Campus Solutions, HCM, FMS

Overview

Pradeep has over 11 years' of experience in software design and development. Nine of those years entail progressive technical experience in the customization and implementation of the PeopleSoft 7.0/7.5/8.0/8.8/8.9/9.0/9.1 HCM, HRMS (HR, Payroll, Benefits Administration), Finance (AP, GL) and Student Administration (FA, CC, SR, SA, AA, SF) modules. Pradeep is technically/functionally proficient in module Development, Upgrade, Interfacing, Conversion, Data Migration and Reports. He is also proficient in PeopleTools, PIA, PeopleCode, and in the creation of complex reports using SQR, PS/Query. Pradeep has extensively used PeopleTools such as Data Mover, Import Manager, Configuration Manager, Query, Application Designer, and PeopleCode Debugger. He is experienced in PeopleSoft Internet Architecture and Open Integration Technology tools Application Engine, Component Interface and Business Inter link. Pradeep is experienced in the design & development of data conversion programs to facilitate the transfer data from legacy system to the PeopleSoft system using SQR/SQL Programming. In addition he has sound knowledge in database development such as Oracle 8.x, SQL, DB2, MS-SQL and operational procedures. Experienced with ASP, Java, Applets, JavaScript, VBScript and Web Authorized Tools. Dynamically created HTML pages based on user queries and database results.

Professional Summary

CLIENT	ROLE	PROJECT TYPE	DATE
University of Texas Tyler	Senior PeopleSoft Technical Consultant	PeopleSoft Campus Solutions 9.0, HCM Implementation	4/13 to 11/13
Lone Star Community Colleges	Senior PeopleSoft Technical Consultant	PeopleSoft Campus Solutions 9.0 Implementation	9/12 to 3/13
HCC Community Colleges	Senior PeopleSoft Technical Consultant	PeopleSoft Campus Solutions 9.0 Implementation	4/12 to 8/12
Ohio University	PeopleSoft Consultant	PeopleSoft Campus Solutions 9.0	3/10 to 3/12
Peralta Community Colleges	PeopleSoft Consultant	PeopleSoft Campus Solutions 8.9; PeopleSoft Finance Upgrade from 8.4 to 9.0	7/08 to 2/10
University of Michigan	PeopleSoft Consultant	Upgrade of PeopleSoft Campus Solutions 8.0 to 9.0	10/07 to 6/08
Brigham Young University	PeopleSoft Consultant	Implementation of PeopleSoft Student Financials 8.9	7/06 to 9/07
University of Houston	PeopleSoft Consultant	Implementation and Upgrade of PeopleSoft HCM Student Administration 8.9	2/06 to 7/06
Princeton University	PeopleSoft Consultant	Analysis, Implementation, Conversion of PeopleSoft HRMS, Student Admin Student Admissions and Student Records	10/04 to 12/05
Cornell University	PeopleSoft Consultant	Analysis, Implementation, Conversion and Production Support of PeopleSoft Student Admin, Student Records, HRMS Ben Admin	12/03 to 9/04
St. Petersburg College	PeopleSoft Consultant	Implementation of PeopleSoft Student Administration on Windows NT Platform	8/02 to 11/03
Northeast Wisconsin Technical College	Technical Consultant	Development of an Extended Application of Outreach Transmittal Transaction Processing	6/02 to 7/02
Fox Valley	Technical Consultant	Resolve Technical Issues with the Database	4/02 to 5/02

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Name: Pradeep R.

Role: Technical Consultant – Campus Solutions, HCM, FMS

CLIENT	ROLE	PROJECT TYPE	DATE
Technical College		Administrator (DBA) and System Administrator	
TRW	Technical Consultant/Analyst	Upgrade Interfaces	4/01 to 3/02
Ernst & Young LLP	Technical Consultant Analyst	Design, Development, Testing and Implementation of PeopleSoft HRMS	4/00 to 3/01
Neem Systems	Programmer / Analyst	Implement and Customize HR, Payroll and Benefit Modules	12/99 to 3/00
Jam Informatics Sign-in Technologies Ltd.	Technical Consultant	Development of Programs for Uploading Data from Legacy System to PeopleSoft Databases	1/99 to 10/99
Gayatri IT Solutions (P) Ltd.	Programmer /Analyst	Designed Exquisite Website Pages for Education, Banking and Finance	4/98 to 12/98
Payroll System JK Enterprises	Technical Personnel	Design, Development and Implementation of Modules	9/97 to 3/98

PeopleSoft Application Expertise

PeopleSoft Packages	PeopleSoft 7.x/8.x/9.1 HCM- HRMS (HR, Payroll, Benefits Administration) Student Administration 9.0/8.9/8.0/7.5 (CC, SR, SA, AA, SF) and Finance 8.4/9.0/9.1 (AP, GL and PO) modules
Development Tools	Application Designer, PeopleCode, PeopleTools Utilities, App Reviewer, App Engine, Workflow Routings, Data Mover, Object Security, Process Monitor, Component Interfaces and App Messaging
Administration Tools	Security Administration, Process Scheduler, Application Upgrader
Reporting Tools	SQR, PS/Query, Crystal Reports, PS/nVision, Workflow, Tree Manager and XML Publisher

Technical Expertise

ERP	PeopleSoft 9.1/9.0/8.9/8.8/8.3/8.0/7.5/7.0
Languages	SQL, PL/SQL, C
GUI	VB6.0, D2K
Internet Technologies	Java2, HTML, DHTML, XML, VRML, Java script, Vbscript, iscripts, Net. Commerce 3.0, FrontPage 2000, Net Objects Fusion, Visual, Interdev6.0, SQL * Loader, MQ-Series
Databases	Oracle 7.x/8.x,9i DB2/7.x, SQLSever7.0/2000
Operating Systems	Windows 95/98/NT/2000, UNIX, and Dos 6.22

Professional Details

University of Texas System, Arlington, TX **Nov/2013 – Present**

Project: PeopleSoft Human Capital Management 9.1 & PeopleSoft Financials 9.1

Role: PeopleSoft Senior Consultant

Environment: HCM 9.1, FSCM 9.1, PeopleTools 8.52, Web Services, IB, AE, Peoplecode, Application Packages, CI, XML Publisher, Oracle 11g, Windows and UNIX.

Roles and Responsibilities:

- Involved in development of **Integrations Web Services** to Campus Solutions.
- Involved in retrofitting Directory web service integration from HCM to multiple Campuses.
- Developed **AAUP** Faculty**, Annual CUPA** report in HCM using App Engine / BI Publisher reports.
- Involved in developing Insurance statistics, Retirement Plan XMLP Reports using AE.
- Involved in retrofitting outbound/ inbound interfaces.
- Developed custom **Connected Query XMLP** Reports for HCM.

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- Developed Grants Sub contracts reconciliation reports using XMLP/ AE technology in FSCM Grants module
- Developed UT International Travel survey system reports for multiple campuses in FSCM .

University of Texas at Tyler, Tyler, TX **June/2013 – Nov/2013**

Project: PeopleSoft Campus Solutions 9.0
Role: PeopleSoft Senior Consultant
Environment: PeopleSoft Campus Solutions 9.0, PeopleTools 8.52, Web Services, IB, AE, Peoplecode, Application Packages, CI, XML Publisher, Oracle 11g, Windows and UNIX.
Roles and Responsibilities:

- Involved in development of **Integrations Web Services** to external systems.
- Involved in providing **SOA** Solutions and service based using Integration Broker Technology.
- Developed Web Services, Services and Service Operations using Non-row set based, Row set based and **CI IB** Technology. Involved in designing/developing and deployed multiple SOA **SOAP** Integrations from PeopleSoft to third party.
- Developed Consume **Constituent ID Sync** from **HR** to Campus Solutions Web Services.
- Developed custom solution for creating **Constituent ID** assignment in Campus Solutions Online /batch for example – **TS189 Texas Common App**/Search/Match/Post Process.
- Developed custom **Web Services** for external System – **QNOMY** to integrate with **Kiosk/Campus Solutions**.
- Involved in developing custom solution for **NSC Consolidated** Academic Statistics outbound Interface.
- Involved in Integration Broker configuration.
- Involved in developing custom business email feed to **HCM** and **Campus email** changes from CS to HR Integration Web Service.
- Involved in developing Assign **Service Indicator** inbound/outbound interfaces using App Engine/ Component Interfaces.
- Developed Maxient feed outbound interface batch program and involved in **PeopleTools 8.53** upgrade retrofitting mods.
- Developed Restful Web Services/Service Operations using Integration Broker.
- Developed custom **Connected Query XMLP** Reports for Campus Solutions. Involved in end-user meetings.
- Involved in providing custom solution for Dual Credit Application admit type automation process to assign **Checklist/Communication**/Service Indicator/Mass Matriculation/Assigning equation engine variables for Waiver/Awards using **PopSelect/POP Update** Query/File parser process.

Lonestar Community Colleges, Houston, TX **Sep/2012 – June/2013**

Project: PeopleSoft Campus Solutions 9.0
Role: PeopleSoft Senior Consultant
Environment: PeopleSoft Campus Solutions 9.0, HCM 9.1, FSCM 9.1, PeopleTools 8.52, Web Services, IB, AE, Peoplecode, Application Packages, CI, XML Publisher, Oracle 11g, Windows and UNIX.
Roles and Responsibilities:

- Involved in development of Integrations Web Services to external systems.
- Involved in CS to HCM Split Core Person – Bio Demo Integrations Owner/subscriber model.
- Involved in Integration Broker configuration, User Profile Integrations in HCM/CS split.
- Involved in Developing search/match Person Create Web Service to HECH.
- Involved in Hosted Payment solution configuration/ setup PeopleSoft and Cyber Source.
- Configured SCC_EPAYMENT_SYNC Service Operation/ Routings, Hosted Payment Adapter and Payment Merchant setup.
- Involved in creating External Nodes configuration and IB setup using Integration Broker Technology.
- Developed Transformation App Engine Programs.

- Involved in customizing the Third Party invoice process and producing Student and Third Party invoices using XML Publisher.
- Involved in providing SOA Solutions and service based using Integration Broker Technology.
- Developed Web Services, Services and Service Operations using Non-row set based, Row set based and CI IB Technology. Involved in designing/developing and deployed multiple SOA SOAP Integrations from PeopleSoft to third party.
- Involved in integration of **ACH Direct deposit** in student Financials.
- Involved in installing configuring and developing MOBILE Apps Web services.

HCC Community Colleges, Houston, TX **04/2012 – Aug/2012**

Role: PeopleSoft Senior Consultant

Project: PeopleSoft Campus Solutions 9.0

Environment: PeopleSoft Campus Solutions 9.0, HCM 9.1, PeopleTools 8.51, Web Services, IB, AE, Peoplecode, Application Packages, CI, XML Publisher, Oracle 11g, Windows and UNIX.

Roles and Responsibilities:

- Involved in customizing the Third Party invoice process and producing Student and Third Party invoices using XML Publisher.
- Involved in providing SOA Solutions and service based using Integration Broker Technology.
- Developed Web Services, Services and Service Operations using Non-row set based, Row set based and CI IB Technology. Involved in designing/developing and deployed multiple SOA SOAP Integrations from PeopleSoft to third party.
- Provided solutions to provide/consume Services and Service operations from PeopleSoft. Posting charge web Services and Real-time Chartfield validation Web services.
- Developed several reports using AE, XML Publisher, Connected queries.
- Involved in integration of GL feed in student Financials.
- Involved in integration of Chartfield import from Financials to Student Financials.
- Involved in setup/ configuration of Chartfield combo edit third party integrations.
- Developed custom process for assigning Advisors using CI.

Ohio University – Athens, OH

Project: PeopleSoft Campus Solutions 9.0

Role: PeopleSoft Consultant

Environment: PeopleSoft Campus Solutions 9.0, PeopleTools 8.50.18, Web Services, IB, AE, PeopleCode, Application Packages, CI, XML Publisher, Oracle 11g, Windows and UNIX

- Involved in development of Integrations in all modules and Student Record, Admissions, Financials Aid and Student Financials Integrations and modifications at Ohio University.
- Worked on Student Records PESC standard Transcript Process, Grade Lapse process, a month advance warning process and Requisite Check and Drop process. Created application engine to identify the student grades to lapse based on client's requirements, using 3C engine run place the communication data into communication component and using Communication Generator send email communication to students and instructors. Also involved in setting up 3C engine to run the process and Communication Generator setup.
- Used Population Select to run 3C engine and created Pop select queries. Developed data sources, report definitions and rich text format documents to generate communication to students. Used Component Interface to lapse the students' grades. Cloned delivered enrollment engine Cobols and created requisite process to drop failed requisite classes.
- Developed several reports using AE, XML Publisher, Connected queries.
- Involved in customizing the Third Party invoice process and producing Student and Third Party invoices using XML Publisher.
- Worked on multiple integrations. IDM creates user profiles in PeopleSoft from TIM authentication then it reconcile with PeopleSoft using the custom created view. Talisma is CRM product which is used for telemarketing. Worked on integration between PeopleSoft and Talisma to send all applicant data information for marketing purposes.
- Involved in providing SOA Solutions and service based using Integration Broker Technology.

- Developed Web Services, Services and Service Operations using Non-row set based, Row set based and CI IB Technology. Involved in designing/developing and deployed multiple SOA SOAP Integrations from PeopleSoft to third party.
- Provided solutions to provide/consume Services and Service operations from PeopleSoft. He worked interfaces like academic program plan change service, checklist item create and update services, Item type create service, Enrollment Add/Drop web services, Posting charge web Services, DARS Pseudo name Integrations and Real-time Chartfield validation Web services.
- Worked on Financial Aid modification to identify FA campus. Based on requirements like SR campus or scholarships or FAFSA campus to load into override table and update FA term campus_fa nightly basis. Worked on other Financial Aid modifications Packaging variables update based on query and file, Budget duration updates.
- Involved in development of setup configuration for running Consolidated statistics. Involved in customization of NSCR Report.
- Worked on Application load process from CollegeNet into PeopleSoft using TS189. Configured delivered TS189 program and also created many other sqcs to load Relationships, Visa Types, Additional Names, Field of Study and other data specific to Ohio. He also involved sending various data elements to third party CRM system (Talisma).

Peralta Community Colleges – Oakland, CA

Role: PeopleSoft Consultant

Project: PeopleSoft Campus Solutions 8.9

Environment: PeopleSoft Campus Community 8.9, Student Records, Student Financials 8.9, Finance Upgrade 9.0 – AP, GL and PO, People Tools 8.48.15, PeopleCode, Application Packages, CI, XML Publisher, SQL SEVER 2005, Windows and UNIX

- Developed custom MIS (Management Information System) California State reports.
- Developed Cal grant GPA custom extract process.
- Developed custom Academic/progress Probation processes to assign academic standing action.
- Developed Prerequisite Drop custom process to drop the student from unsatisfactory pre-registered course.
- Involved in configuration and setup of Bi-directional integration feeds between Student Financials and Finance.
- Involved in integration of GL feed in student Financials.
- Developed custom out bound / inbound interfaces and reports as per client requirements.
- Involved in setup configuration of Integration Broker messaging between Financials and Student Administration.
- Involved in development and reapply bolt on customizations.
- Involved in configuring Print Receipts setup using Forms Engine.
- Developed custom Inbound / Outbound Application Engine Interfaces to load / extract data using PeopleCode, Component Interface, File Layouts and App Packages.
- PeopleSoft Finance Upgrade from 8.4 to 9.0
- Performed Vanilla compare between production (copy) databases to demo database to identify all customizations to be carry forward with upgrade.
- Involved in resolving the upgrade issues from PeopleSoft 8.4 to v9.0
- Involved in upgrade and customization of SQR's.
- Involved in creating custom checks setup for Student refunds and Retrofitting custom applications, pages and reports.
- Involved in discussion and participative resolution of issues arisen during running upgrade scripts, Planned and implemented fixes for issues and bugs with delivered scripts.
- Involved in developing new People Code and customizing existing People Code based on user requirements.
- As a part of Production Support involved in resolving day-to-day issues related to Student Administration and Finance modules.

University of Michigan – Ann Arbor, MI

Role: PeopleSoft Consultant

Project: Upgrade of PeopleSoft Campus Solutions 8.0 to 9.0

Environment: PeopleSoft Campus Community 9.0, Student Financials 9.0, People Tools 8.48.15, PeopleCode, Application Packages, CI, XML Publisher, Oracle 9i, Windows and UNIX

- Developed custom automated process for UM Emergency Alerts Messaging System to Third Party 3n.
- Modified existing interfaces, reports and processes.
- Involved in configuration and setup of Bi-directional integration feeds between Student Financials.
- Involved in integration of GL feed in student Financials.
- Developed custom self-service pages as per client requirements.
- Involved in setup configuration of Integration Broker messaging between Financials and Student Administration.
- Involved in development and reapply bolt on customizations.
- Developed custom Inbound / Outbound Application Engine Interfaces to load / extract data using PeopleCode, Component Interface, File Layouts and App Packages.

Brigham Young University – Provo, UT

Role: PeopleSoft Consultant

Project: Implementation of PeopleSoft Student Financials 8.9

Environment: PeopleSoft Student Financials 8.9, People Tools 8.46, PeopleCode, Application Packages, CI, XML Publisher, Oracle 9i, Windows and UNIX

- Involved in setup configuration of Integration Broker messaging between Financials and Student Administration.
- Developed custom automated process for ACH Transactions in AP Refund Setup.
- Configured and setup for AP Refunding in Student Financials.
- Involved in configuration and setup of Bi-directional integration feeds between Student Financials.
- Involved in integration of GL feed in student Financials.
- Developed processes for assigning and removing Service Indicators.
- Involved in integration of Chartfield import from Financials to Student Financials.
- Developed custom self-service pages as per client requirements.
- Involved in setup/ configuration of Chartfield combo edit third party integrations.
- Developed custom Inbound / Outbound Application Engine Interfaces to load / extract data using PeopleCode, Component Interface and File Layouts.

University of Houston – Houston, TX

Role: PeopleSoft Consultant

Project: Implementation and Upgrade of PeopleSoft HCM Student Administration 8.9

Environment: PeopleSoft HCM Student Administration 8.9, People Tools 8.46, PeopleCode, Stat, Application Packages, CI, XML Publisher, Oracle 9i, Windows and UNIX

- Involved in design/ analysis to determine actions to be performed when a returned check is associated with the student.
- Developed custom automated process of NSF Check Letter using AE/CI, COBOL process.
- Developed custom rollout process to assign Negative Service Indicators using Application Packages and CI.
- Involved in Retrofits of Self-service Annual Parking Selection
- Developed self-service pages for Health Insurance and Year Book Loan selection.
- Extensively worked on Prospect Loads.
- Involved in developing Admission Overall GPA across Institution Transcripts & Separate GPAs.
- Developed custom mod to populate Custom fields for State Reporting.
- Involved in Retrofitting the Referential Integrity (Student with Multi Career).
- Developed Campus Specific Custom Test Score Loads.
- Developed custom Inbound / Outbound Application Engine Interfaces to load / extract data using PeopleCode, Component Interface and File Layouts.
- Retrofitted Alumni Interface and as a part of Production Support involved in resolving day-to-day issues related to Student Administration.

Princeton University – Princeton, NJ

Role: PeopleSoft Consultant

Environment: Student Administration 8.0, People Tools 8.21, PeopleCode, Application Designer, Application Engine, Component Interfaces, SQR, PS Query, Oracle 9i, Win 2000/NT and UNIX

- Analysis, Implementation, Conversion of PeopleSoft HRMS, Student Admin Student Admissions and Student Records
- Involved in customizing and creating records, pages, and menus for the Student Admissions & Student Records modules.
- Developed SQR programs and Customizations in Student Admissions module for reapplying the business logic associated with PeopleSoft delivered components using the existing PeopleSoft Component for Prospect Search Loads/ Test score loads.
- Developed Custom Email Functionality to provide UA with the ability to test email layouts before they are formally assigned to applicants.
- Developed Application Engine Programs to load data into various application tables and security related tables by using PeopleCode, Component Interface and File Layout.
- Customized some of the delivered PeopleSoft reports to meet client's requirements.
- Successfully defined a process for resolving duplicates and developing departmental Search/Match guidelines for accepting or adding a student in PeopleSoft Admissions.
- Involved in Fit Gap Analysis of Student Administration v/s University process.
- Involved in writing functional specs for reports, interfaces, and customizations, and identified cross-functional issues for conversion mappings from Legacy to PeopleSoft.
- Involved in setting up Milestone Templates and collecting/gathering of the Requirements/Needs of the Student Admissions and Student Records modules.
- Extensively involved with the users and functional team members to gather report requirements, analyzed and suggested the best possible reporting tools (SQR, PS Query) need to be used.
- Developed multiple queries using PS Query and to created SQL Views using Application Designer.
- Designed and developed custom Mods in AE/CI, File layouts and PS/Query like Auto create OPEN ENR Data, Cohort Year Data Sets, FSI, BOAT (Batch Output Assignment Tool) Purge Transactions Log, BOAT Error report, Predefined Run control setup, UA Rate report and Official Transcript Purge to name some.
- Developed conversion SQR Programs for legacy Test Score details of Applicant & Prospect to the tables in PeopleSoft & Interface from Legacy Undergrad to the personal data tables in PS.

Cornell University – Ithaca, NY

Role: PeopleSoft Consultant

Environment: PeopleSoft HRMS Ben Admin 8.0, Student Administration 8.0, People Tools 8.19, PeopleCode, Application Designer, Application Engine, Component Interfaces, SQR, PS Query, Oracle 8i, Win 2000/NT and UNIX

- Analysis, Implementation, Conversion and Production Support of PeopleSoft Student Admin
- Student Records, HRMS Ben Admin.
- Involved in writing functional specs for reports, interfaces, and customizations, and identified cross-functional issues for resolution with other areas, including Student Records modules.
- Involved in implementation and Fit Gap Analysis of Student Administration Applications- Student Records.
- Involved in collecting/gathering of the Requirements/Needs of the Student Administration Modules (Student Records).
- Involved in the setting up academic structure and academic program of the organization, enrollment process, term activation and grade reporting.
- Used PS Query to define Queries and to create SQL Views in the Application Designer.
- Involved in customizing and creating records, pages, and menus for the Student Records module.
- Written conversion SQR Programs for Ben Admin Nysers.
- Involved in remediation of SQRS and development Ben Admin Interfaces, BAS Activity Utilities and BAS Enrollment Forms.

- Used the Application Engine for writing the Component Interfaces in Student Records module for reapplying the business logic associated with PeopleSoft delivered components using the existing PeopleSoft Component APIs for Academic Advising Transcripts.
- Designed and developed custom Mods in AE/CI, File layouts and PS/Query like Auto create Milestone Templates, Diploma Management, Drop enrollment Prevention, Median Grade and Noncredit and Interfaces like Extract Intl students, Addresses from Housing system, Interface to Enrollment, Enrollment Load Process and Non Credit transcripts to name some.
- Involved in defining a process for resolving duplicates and developing departmental Search/Match guidelines for accepting or adding a student in PeopleSoft Admissions.
- Responsible for Setting up Academic Calendars, Dynamic Classes, Level/Road Tables and academic Programs set up.

St. Petersburg College – Seminole, FL

Role: PeopleSoft Consultant

Environment: PeopleSoft 8.0 Student Admin, People Tools 8.0/8.14, 8.18 PeopleCode, SQR, Oracle 8.0, Windows NT, Crystal Reports

- This Project involved in Implementation of PeopleSoft Student Administration on Windows NTPlatform
- Designed and developed Component Interfaces for FACTS, College Transcripts, and Academic Advising Degree Audits like Grad audit, Local shop and Course lists using java and People code by User Defined methods.
- Designed and developed LDAP Authentication using java for FACTS.
- Using Maintain Security assigned new Permission Lists and Roles based on our organizational needs to use the PeopleSoft functionality of Role based Security. Involved in Mass creation of Users.
- Worked on data mapping by identifying all the external source tables and fields and identifying corresponding PeopleSoft tables and fields for our data conversion.
- Written SQR programs which will extract the (Flat files) and loaded it into PeopleSoft benefit tables and these reports are written to handle rejected rows and to produce report identifying the rejected rows.
- Involved in customizing Student Records application by creating Records, Panels, panel groups, attached them to required menus through Application Designer and made them available to various operators and Operator Class through Security Administrator.
- Gathered reporting requirements from users and functional team members, analyzed and suggested the best possible reporting tools (SQR, Crystal, PS Query) need to use.
- Created Run Control panels, Panel Groups and added process definitions to set the customized reports to run under Process Scheduler and to get user run control parameters for the reports. Created a custom batch program using SQR to upload Print Roster and Enrollment Roster by Class from Microsoft Excel to PeopleSoft.
- Designed and developed custom reports in SQR, Crystal and PS/Query like Veteran Summary report, veteran progress report, veteran schedules report, Survey labels report, and credit and Non Credit transcripts to name some. Customized some of the delivered PeopleSoft reports to meet client's requirements.
- Developed HTML WebPages, Iscripts for customized online application.
- Developed SQR Conversion programs for External Organization data to load from flat file & also written conversion programs for School Subject maintenance.
- Developed Conversion Programs for Student Secure Administration & Secure Student Financial as per security basis.

Northeast Wisconsin Technical College – Green Bay, WI

Role: Technical Consultant

Environment: PeopleSoft 7.5, PeopleTools 7.6, PeopleCode, SQL Server 7.0, SQR, and Windows NT

- Developed an Extended application of Outreach Transmittal Transaction Processing which is extended of HRMS and Student Administration Modules.
- This Application is used to track the sales of books for the Outreach Systems.

- Involved in discussions with functional users to discuss the scope of the project.
- Worked as a Technical consultant. Responsible for analyzing and creating technical specifications for all the new and customized processes.
- Created new Records, Panels and attached them to menu's and assigned the menus to operator classes through security administrator.
- Modified existing People code to accommodate the customization made to the existing module. Written people code to execute the business logic. Created new SQR Reports Right from Scratch for the application and attached it to the Process Scheduler using Application Designer to create new run control records.
- Designed and developed new Panels and Panel Groups according to the parameters required & attached to Menus and given security to run the reports. Developed Class Roster Workbook Information report, which prints Class Roster information from different tables.
- Created an auto charge process from the cashier panel to the student account.

Fox Valley Technical College – Appleton, WI

Role: Technical Consultant

Environment: PeopleSoft 8.3, PeopleTools 8.16, Oracle 8.0, SQR, and Windows NT

- Resolved technical issues with the Database Administrator (DBA) and System Administrator. Created all necessary technical checklists to ensure completion of the upgrade.
- Implemented the Security using the Maintain Security and Object Security to restrict users to the Database tables holding data sensitive Application tables.
- Assigned Permission lists, Roles and Profiles using Maintain Security.
- Responsible for Creation of New User Profiles based on roles and assigned permission lists.
- Responsible for implementing Security issues in assigning access to the Self Service Pages for Students and Employees.
- Resolved technical issues of SQL Tracing, Printing/Running a two part crystal Report.
- Involved in setting up of Third Party Contracts in Student Admin Module.
- Incorporated rules to determine what activities are required to process the Business Data and attached to the Roles through Workflow Administrator.
- Involved in the production Support and resolve the user Problems with PeopleSoft workstation and functional issues.
- Developed the SQR's for the queries to schedule and send out reports using email functionality in Reporting.

TRW – Cleveland, OH

Role: Technical Consultant/Analyst

Environment: PeopleSoft 7.5/8.X, Oracle 8.0, SQR, PeopleTools 8.1, PIA, Integration Tools, HTML and Windows NT on client workstations

- Upgraded the interfaces including salary adjustments, benefit adjustments and other reports
- Used PeopleSoft Upgrade Assistant and Data management tools in Upgradation from PeopleSoft 7.5 to PeopleSoft 8.x.
- Involved in development of Pages, Components and menus using PeopleSoft Internet Architecture.
- Involved in development of Pagelets using Portal Technology for web implementation.
- Developed Pagelets Using PIA and iScripts and tested using Portal registry. Involved in development, testing and moving the reports to production.
- Involved in analysis of existing PeopleSoft 7.5 reports and upgraded the same to PeopleSoft 8.x.Worked with reports like tiper 606, tiper 607 and etc., I have worked with new reports like tiper506 which will generate a report for the specific location of people.
- I have also involved in testing the same reports when client upgraded the back end database to Oracle 8.0 with PeopleSoft 8.x.
- Worked as a senior technical consultant. Responsible for analyzing and creating technical specifications for all the new and customized processes.
- Created new Records, Panels and attached them to menu's and assigned the menus to operator classes through security administrator.

- Developed outbound interfaces for third party vendor's, which consisted of employee, benefit related data. Created inbound interfaces for updating the employee's and dependent's benefit election data which is sent from web. Analyzed and developed a new interface for payroll audit which will determine and report changes to payroll deductions.
- Modified existing SQR's, SQC's, Panels, Records, Views to incorporate and implement the changes. Was also responsible for creating and upgrading projects from Development database to Test and Production. Created run control panels for all the SQR's for scheduling them on Process Scheduler.

Ernst & Young LLP – Lyndhurst, NJ

Role: Technical Consultant Analyst

Environment: PeopleSoft HRMS 7.52, Oracle, SQR, Crystal Reports, Windows 95 and UNIX

- Involved in design, development, testing and implementation of PeopleSoft HRMS (HR, Payroll and Benefits) Modules with Oracle as the backend database. Designed and developed several interfaces like Benefits Interface which updates the benefits coverage's and personal data in Client's system, based on the changes occurred the day before in the existing system.
- Developed DB2 employee table interface, which create a file that contains daily changes to an employee's data. This file is used to update the Client's mainframe system. Also developed 457 benefits interface and annual salary tape interface. Developed queries as per the user requirements and attached to the production list for the convenience in the generation of the reports & communicated with the end users to make the format of the various reports.
- Used Process Scheduler to run the processes & reports through PeopleSoft panels and used Process Monitor to view the status of the reports. Performed System analysis on conversion of flat files from Payroll System to PeopleSoft Database & loaded the data by using SQR Code. Worked on Technical Designs, SQR Technical Design, Data Mapping and Test Conditions for the Conversion Programs like Federal tax data, leave plan data, leave accrual data.
- Worked extensively with SQR reports by Customizing the Vanilla Reports and Processes as per the requirements of the users.
- Designed and developed custom reports in SQR, Crystal and PS/Query like Veteran Summary report, Executive Summary and Report of Grievances/Complaints. Also customized some of the delivered PeopleSoft reports to meet client's requirements.

Neem Systems

Role: Programmer / Analyst

Environment: PeopleSoft 7.0, PeopleSoft HRMS HR, Benefits, Payroll, SQR, Crystal Reports, Oracle 7.x

- Implemented and customized HR, Payroll and Benefit modules. Responsible for design and development of new reports and fine tuning/customization of existing reports.
- This project also involved customizing record definitions, panels, menus and security for Payroll and Benefits modules.
- Participated in new application development and customizations of the existing modules according to business needs. Design and development of SQRs.
- Modified panels to business requirements. Reconciled data and managed record keeping. Responsible for data auditing process. Enrolled new employees into 401K plan. Involved in designing plans, installations, valuation of procedures, and reporting. Involved in Planning of administration processes.

Jam Informatics Sign-in Technologies Ltd.

Role: Technical Consultant

Environment: PeopleSoft 7.0/7.5, SQR, PeopleTools, Oracle

- Involved in the development of programs for uploading data from legacy system to PeopleSoft databases as per requirements of the clients, developing SQR programs for the retrieval of test data and creating dynamic views using Application Designer.
- Involved in the design, development and testing of data conversion programs using SQR, PeopleTools Mass Change. Created replica tables for the base tables in oracle, wrote SQL Loader

programs to upload data into the replica tables and created Mass Change Definitions and run against the replica tables to make mass inserts and updates on the HR and Pay Roll tables.

Gayatri IT Solutions (P) Ltd.

Role: Programmer /Analyst

Environment: HTML, DHTML, Java Script, Front Page, Flash and Dream Weaver

- This Website gives a bird's eye view about the twin cities of Hyderabad and Secunderabad. It covers all the topics that are related to the twin cities. Designed Exquisite Pages for Education, Banking and Finance. This website specifically deals with Marriage Bureaucracy and Matrimonial information. Developed screens to create new membership accounts and update existing member personal details.

Payroll System JK Enterprises

Role: Technical Personnel

Environment: Visual Basic 5.0, Oracle 7.3 and MS-Access

- Responsible for design, development and implementation of the modules
- The system was developed using Visual Basic 5.0, MS Access and Oracle 7.3.
- Responsible for developing all general purpose routines for master and transaction data entries and developed system security and administration module in which users are classified into groups.
- Was responsible for further enhancements in the system and responsible for testing and documentation.

Education/Certifications/Training/Presentations

Bachelor of Engineering: Mechanical Engineering in INDIA
PGDCA: Post Graduate Diploma in Computer Application
People Soft Training: Tools I, Tools II, HRMS, SQL, SQR, PeopleCode, Crystal Reports and nVision
Accomplishments: IBM Certified e-Commerce professional from Pentasoft Technologies Ltd.

References

The University of Texas at Tyler
Name : Jason McQuigg
Title: Senior Programmer/Analyst, Information Technology
Email: jmcquigg@uttyler.edu
Phone: (903) 566 7495

Lonestar College System
Name : Mary Sims
Title: Senior Developer, Office of Technology Services
Email: Mary.J.Sims@lonestar.edu
Phone: (281) 290-2713

Ohio University
Name : Shelley A Ruff
Title: Director OIT, Ohio University
Email: ruff@ohio.edu
Phone: (740) 597 2117

Name: Stephen P.

Role: PeopleSoft Technical Consultant

Overview

Stephen's comprehensive experience includes over nine years in the implementation and support of PeopleSoft Financials, HRMS & Campus Solutions. He is an organized, analytical professional with strategic perspective and the ability to identify problems and implement innovative solutions to ensure successful business programs. His specific PeopleSoft experience includes technical fit gap, SQR development, page/panel development, report development, and production analysis. Recently his work has focused both on the Campus Solutions application and Payroll/Taxes Module for the HRMS application in the higher education industry. With a history of working in various sized companies, Stephen has acquired a multitude of skills ranging from technical requirements gathering, technical design, development, and issue resolution. He has a broad-based background in PeopleSoft implementations, upgrades, and is an exemplary performer in the area of troubleshooting.

Professional Summary

CLIENT	ROLE	PROJECT TYPE	DATE
University of Puget Sound	DBA Consultant	Implementation PeopleSoft CS, HCM, Fin, Portal, EPM	Nov/2011-Present
Wind Star Technologies	Technical Consultant	Technical support interfacing between PS and 3rd party Tax application	July/2006-Oct/2011
National Park Community College	Conversion Lead	Campus Solutions 9.0 Implementation	June/2009-Sep/2010
Santa Clara University	Technical Consultant	iScripts to aid in communication between systems	June/2010-July/2010
Jerue Trucking	Technical Consultant	Upgrade to SQL server	June/2006-June/2008
Watkins Motor Lines	Technical Consultant	Built custom employee health and safety program	May/2005-May/2006
PNM	Technical Consultant	End-User training for PeopleTools 1 & 2, PeopleCode, App Engine, and Integration Tools	April 2005
Advantec Solutions	Technical Consultant	Implemented Benefits Administration, Self-service Security Tool	Jan/2005-Apr/2005

PeopleSoft Application Expertise

- Campus Solutions
- Payroll/Taxes
- Security
- Application Engine
- PS Query
- Financials
- Benefits Administration
- Application Designer
- Application Packages
- iScripts
- Human Capital Management
- PeopleTools
- Application Engine
- Application Workflow Engine

Hardware Experience

- Sun V100
- VAX/DEC Microsystems Mainframe
- Compaq Proliant
- Hewlett, Packard, Dell, Gateway PC's
- AT&T Telecommunications System
- Routers, Switches, Hubs, Ethernet Cabling

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Main # 303.802.5200
Fax# 303.802.5201
www.highstreetit.com

Name: Stephen P.

Role: PeopleSoft Technical Consultant

Operating Systems

- Unix: Sun Solaris 8, Linux
- Used Linux since 2002
- Installed and upgraded numerous distributions
- Worked with both RPM and Deb packages using yum, apt-get, yumex, synaptic, etc.
- Installed single user Linux-PeopleSoft VMs using Oracle Enterprise Linux.
- Windows XP, Windows 2000 (both professional), 2000 Server/Advanced Server, NT, 98, 95, 2003 Server

RDBMS

- SQL Server
- MySQL, Access, Java DB, HSQL
- Oracle

Professional Summary

University of Puget Sound

Project: Implementation PeopleSoft CS, HCM, Fin, Portal, EPM

- DBA work in implementing 5 applications + Hyperion (PeopleSoft Financials, HRMS, Campus, Portal, and EPM).
- Automating DBA + SysAdmin work such as refreshes, starting environments, etc.
- Trained new DBA/System Administrator on system Administration tasks.
- Researched and fixed issues as they arose.
- Installed and assisted in bringing the system live.
- Built / Configured EMHub Framework and installed Change Packages with Change Assistant.

Wind Star Technologies

Project: Technical support interfacing between PS and 3rd party Tax application

- Sole technical support of custom interface between PeopleSoft and a third-party Tax application using Application Engines and Component Interfaces
- Provided system administration for VMWare development environments including installation of HRMS 9.0 and Financials
- Provided direct support solving complex data issues on the Client's systems using WebEx for clients such as NYU, University of North Dakota, UVM, URI, Case Western University, University of Oklahoma, Columbia University
- Built IScript programs for automation of tasks such as running payroll and interfacing of data
- Converted PeopleSoft File Layout Objects to implement new file layout requirements
- Designed and built a customized program to update the earnings codes on pay lines based on rules and data imported from a third-party application
- Re-factored interface code into Application Packages for maintenance and troubleshooting ease
- Wrote a VB.Net program and an IScript to transfer data over HTTP without creating files for security purposes
- Created a VB.Net program to post data to a PeopleSoft IScript
- Wrote an IScript to receive and provide XML data to external applications
- Wrote an IScript to provide a robust and quick development center with shortcuts to various items in PeopleSoft
- Wrote an IScript to talk with an AJAX page and automate tasks without reloading the page; communicates in JSON

National Park Community College

Project: Campus Solutions 9.0 Implementation

- Sole technical support of custom interface between PeopleSoft and a third-party Tax application using Application Engines and Component Interfaces

- Provided system administration for VMWare development environments including installation of HRMS 9.0 and Financials
- Provided direct support solving complex data issues on the Client's systems using WebEx for clients such as NYU, University of North Dakota, UVM, URI, Case Western University, University of Oklahoma, Columbia University
- Built IScript programs for automation of tasks such as running payroll and interfacing of data
- Converted PeopleSoft File Layout Objects to implement new file layout requirements
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- Wrote an IScript to provide a robust and quick development center with shortcuts to various items in PeopleSoft
- Wrote an IScript to talk with an AJAX page and automate tasks without reloading the page; communicates in JSON

Santa Clara University

Project: iScripts to aid in communication between systems

- Assisted with iScripts to aid in communication between systems
- Worked with Trust Commerce payments so students could pay for parking permits
- Leveraged Java objects to give PeopleCode more functionality
- Created code with a Component/Page to request and retrieve a token from a 3rd party, external website for authentication
- Reviewed code and guided an internal programmer who did the work and applied to concepts to their system

Jerue Trucking

Project: Upgrade to SQL server

- Provided business analysis, programming, and technical assistance
- Performed DBA duties for a SQL Server 2000 Database
- Assisted in upgrade to SQL Server 2005
- Provided end-to-end solutions. Tasks included gathering requirements from end-users, designing fixes and enhancements, programming, training, and documenting.
- Provided production support
- Implemented testing and QA strategy
- Designed and Built an automated testing framework
- Provided consulting on development methodologies to grow the team from two to five including source code control, task tracking, and code migration techniques
- Implemented a Purchase Order System
- Designed and Built interfaces with third-party vendors including an EDI Interface with Walmart

Watkins Motor Lines

Project: Built custom employee health and safety program

- Technical resource working on coding custom employee health and safety program
- Worked on debugging PeopleSoft production issues in the HRMS and Financials environment
- Taught PeopleCode and Integration Broker classes

PNM

Project: End-User training for PeopleTools 1 & 2, PeopleCode, App Engine, and Integration Tools

- Delivered two weeks of end-user training in PeopleTools I, PeopleTools II, PeopleCode, Application Engine, and Integration Tools.
- Received letter of reference and was described as "one of the best teachers we have experienced".

Advantec Solutions

Project: Implemented Benefits Administration, Self-service Security Tool

- Created Self-Service security tool using component interface that would allow managers to assign security to employees.
- Worked on implementing Benefits Administration
- Wrote a data migration tool to copy a portion of a system's data from one database to another using the PeopleSoft record definitions.
- Responsible for updating SQR programs during HRMS upgrade
- Turned initial 2 week assignment into almost 18 month opportunity

Implementation/Install Experience

- Installed HRMS 8.0 & 8.3 on Windows 2000/SQL Server.
- Installed Financials 8.4 on Windows 2000, Sun Solaris/Oracle.
- Installed and configured Linux, Samba, and Networking Interfaces.
- Installed, cabled, configured, and maintained PBX Telecom system.

Network Management Experience

- Troubleshoot network and PC's for multiple county-wide networks.
- Rapid mass installation of Windows 2000 Professional across three-county network (200+ end-users).
- Developed windows automation scripts for clients
- Configured Active Directory, DHCP, DNS, Group Policies, Backups.

Development Experience

- Developed web-based student administration system from design to implementation.
- Developed reporting format and database tool to update University of Florida PeopleSoft project plan for Financials and HRMS.
- Developed end-user documentation.
- Developed change management system, set up help desk operations

Education/Certifications/Training/Presentations

- **Pensacola Christian College**, Pensacola, FL - Bachelor of Science, Computer Science, (Magna Cum Laude)

Name: Thomas M.

Role: Functional-Technical Consultant – CS/FIN-Grants

Overview

Candidate has over 20 years of experience in the design, development, implementation, customization and support of various automated financial software systems. Prior to becoming an independent consultant, Thomas was a Process Specialist Consultant with PeopleSoft Consulting, a Sr. Developer with the Education and Government PeopleSoft development team, a development manager with a Big Five Accounting firm and Sr. Consultant with EDS. Thomas is fully versed in all phases of the system's development life cycle including design, coding, documentation, testing and the implementation of financial systems. Thomas has management, functional and technical application development and training experience. He has created functional designs, technical designs, coded processes, tested his modifications and trained the clients in the use of the modification and other PeopleSoft applications.

PeopleSoft Application Expertise

- Projects
- Property Tax
- Grants
- Contracts
- Budgets
- Billing

Technical Expertise

- PeopleTools
- Application Engine
- DMS Scripts
- AU Database Utilization
- Process Scheduler
- Microsoft Access
- Microsoft Word
- SQL Query for all P.S. supported Databases
- ORACLE
- TSO
- PeopleCode
- Crystal/Query
- PeopleSoft Query
- HTML/XML
- Tuxedo/App Server
- PowerBuilder
- Microsoft Excel
- PeopleSoft Security
- SYBASE
- DOS
- Component Interface
- Application Objects
- Project Migrations
- COBOL
- Natural
- Basic
- SQR
- SQL Server
- DB2
- UNIX

Professional Detail

University of North Carolina – Chapel Hill

Independent Functional PeopleSoft Grants Consultant May 2011 – Present

Thomas was selected by the University of North Carolina to be the Functional Lead for the implementation of the PeopleSoft Grants suite of products. This includes the Grants, Projects, Contract and Billing modules. He will be working closely with the functional lead for the Accounts Receivable module to insure a seamless integration. Thomas will also play a major role with the development and design for the interfaces of Human Resources and the Student Financials systems. Thomas is responsible for the configuration of these modules and interfacing the transactions through the Commitment Control for budget validations. Additionally, he will be creating functional designs for the interfaces to and from third party

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software. Thomas is tasked with converting historical budgets, historical transactions, designing any required modifications to the delivered system, testing the modifications as well as testing the delivered system, documenting the business processes and educating the University of North Carolina on the processes involved for the Grants suite of products.

University of Wisconsin - Madison

Independent Technical/Functional Grants Consultant May 2010 – May 2011

Thomas was brought back to the University of Wisconsin to assist with the updates to the Cost Share process as well as to assist with production support of the financial system. He is currently designing and developing modifications to the Financial Federal Report, Cost Share enhancements with the initial design. He is also performing tuning audits and corrections to the Grants budget process, and security for Grants. He is working with Application Engine, SQR, SQL, Application Objects, updating pages, tables, fields and PeopleCode.

Georgia State University - Atlanta

Independent Technical/Functional Grants Consultant Jun 2008 – May 2010

Thomas was brought to the Georgia State University to assist with implementation of Grants, Projects, Contracts, Billing and Accounts Receivable. Thomas is responsible for Fit-Gap analysis, creating modification designs to the system, management of the modifications, the implementation and creation of the objects required for the modifications. Thomas is also responsible for the designs and objects required for the conversion process. He has developed the conversion process strategy and conducted tests with conversion data. The conversion process included Application Engines, Component Interfaces, File Definitions and other programs to facilitate the conversion, modification, reporting and validation conversion data. He has also managed the creation and development of the security roles for users. He has been an integral part of the configuration process for the four modules. Thomas is responsible for prioritizing, assigning and completing the tasks associated with the implementation of the Grants suite of modules. A number of the modifications Thomas was responsible for included a Proposal Express process for PI's, Cost Share programs specific to Georgia State, Billing Limits, Custom Project Numbering, SpeedType Creation, Commitment Control Parameters and Search parameters for Proposals and Awards to name a few.

University of Wisconsin – Madison

Independent Financials Technical Consultant Dec 2006 – Jun 2008

Thomas was brought to the University of Wisconsin to assist with the creation of modifications to the system as required by the client. He is responsible for the creation of new fields, tables, pages, messages, processes, SQR's, Application Engines and other objects required for the completion of these modifications. Thomas is also tasked with debugging and correcting issues that may arise during the implementation of the Grants, Projects, Contracts, Billing, A/R and Commitment Control modules for PeopleSoft. He is used as a resource for the review of technical and functional designs. Additionally, Thomas has been tasked with the creation of test scripts for the modifications. Modifications include custom reports, a custom Project Numbering modification, creating pages to track objects within a project for technical designs, a custom Cost Share Application Engine process to accept the legacy payroll data and apply client specific percentages via custom pages, custom tables and

a custom process. Thomas was also responsible for the conversion of data, bug fixes and the implementation of hot fixes from PeopleSoft.

Independent Consultant – State of Florida, Tallahassee
Functional / Technical Resource **May 2005 – Dec 2006**

Initially, Thomas was brought on to assist with the implementation of Grants, Projects, Contracts and Billing. He was tasked with configuration, testing modifications and creating test scripts. After initially working with this task and completing his assignments. Thomas was given additional work with the development of interfaces with their budgeting system and assisting with the implementation of the General Ledger module and Commitment Control. Thomas was tasked with creating and maintaining SpeedTypes, Journal Generator Templates and Accounting Entry Definitions. He assisted with the creation and maintaining the Commitment Control Ledgers and balancing specific chartfields. As one of his last assignments on the project, he was appointed to head the interface process from the existing LAS/PBS budgeting system to PeopleSoft GL and Commitment Control. This entailed the creation of several new interface tables, new fields, new pages and a process to migrate the data from LAS/PBS to PeopleSoft. Thomas created several pages to view the incoming data and resulting effects on both the GL and Commitment Control modules. Thomas was a resource for the functional staff to review and validate both functional and technical designs and modifications. He has taught classes in the use PeopleSoft Query, Reviewing Commitment Control and PeopleCode logic. He is also responsible for creating and validating test scripts for both the Grants suite of modules as well as General Ledger. Thomas has also been a key resource to review and create technical documents for all modifications and interfaces.

PeopleSoft

Process Specialist /Sr. Consultant / Consultant / Developer Manager / Sr. Developer
Apr 1997 – May 2005

As a Sr. Developer, Thomas was responsible for the Grants and Projects modules for versions 5.0 through 8.x. Thomas was responsible for coding client requested modifications, creating and developing new functionality for the modules and testing the modifications for delivery. In addition to the modifications, he was responsible for maintaining previous releases of the software. This included corrections, modifications and enhancements to the software. Thomas was then tasked with the development of the Grants suite of modules. He played a major role in the technical development of the Pre-to-Post routines the interfaces with the Projects module and interfaces with both the Contracts and Billing modules. Thomas was also involved with the integration and designs standards from the 7.5 client sever PeopleSoft version to the PeopleSoft 8.x web based versions. After several years as a developer, Thomas transferred to the consulting group to work personally with clients. He began his consulting career as a technical lead for the Grants suite of modules and has worked to become a functional lead as well. As a Process Specialist he was responsible for creating configuration documents, business processes designs, functional and technical designs, developing code and testing the customized code for client. He also developed training sessions for both the functional and technical aspects of the software. While working with PeopleSoft he obtained both the functional and technical certifications.

Responsibilities included:

- Lead developer and eventual manger to maintain the Projects Module for version releases 5 through 8.
- Lead developer for the Grants module.
- Lead developer for the Property Tax module.
- Develop functional and training materials for the client
- Create implementation documents that include business processes, configuration, functional and technical designs, testing scenarios and finalization reports.
- Product Lead for the Grants module. Responsibilities included monthly meetings with the product strategist to review ideas for new modifications to improve the system.
- Both Lead Technical and Lead Function consultant for over 5 implementations ranging from version 7.5 to 8.8.
- Technical resource for clients having issues with the implementation. These issue included Grants, PO's, Commitment Control, Projects, Billing, conversions and interfaces. Thomas was sent to the client to find the problems, correct the problems, document the resolutions and implement the solutions for the successful implementation.

Positions held: Sr. Developer; Module Lead Developer; Consultant; Sr. Consultant; Process Specialist

Clients

- University of Wisconsin
- Georgia State University
- University of Louisville
- University of North Carolina
- State of Florida
- University of Missouri
- Children's Hospital Cincinnati
- Riverside County
- State of Connecticut
- Children's Hospital Los Angeles
- Wake Forest
- WellPoint
- CBRE Los Angeles

KPMG Peat Marwick

Consultant / Sr. Consultant / Manager **Jul 1989 – Apr 1997**

Thomas was responsible for the implementation and maintenance of KPMG's financial software, FAMIS (Federal Automated Management Information System) and FAMIS 4. Thomas was responsible for maintaining, and modifying the FAMIS system to meet client requests and expectations. Thomas also managed a FAMIS 4 development team to upgrade and enhance the system for new configurations and modifications. Thomas was an integral participant in the first release of FAMIS 4. This system was successfully implemented in several Federal Government clients.

Responsibilities included:

- Office of Personnel Management / Executive Office of the President / Senate/State Department —FAMIS 4 Financial implementation and maintenance. Created design documents, modified code and tested modifications. Managed post-production support.
- Completion of the several proposals to purchase and demonstrate the functionality of FAMIS software to eventual clients.

- Thomas was a lead in the process and eventual passing of the federal mandated JFMIP requirements.
- Created code and reporting software for W2 forms, 1099 forms, departmental budgeting, transaction listings and personnel profiles.
- Created and led several training classes in the functional and technical processes for the FAMIS 4 system.
- Was responsible for the creation of journal entry, reconciliation and budgetary data screens and records for the FAMIS 4 version of KPMG software.
- Positions held:
  - Consultant
  - Sr. Consultant
  - Manager
  - Clients
  - U.S. Office of Personnel Management
  - U.S. Senate
  - Executive Office of the President
  - USIA

Electronic Data Systems EDS

Systems Engineer Phase I / Phase II / Phase III **Aug 1988 – Jul 1989**

Thomas was responsible for validating check releases, business processes, creating adhoc reports. He modified processes and programs to better adhere to client requests. Created billing, payment and accounting reports based on client specifications. Assisted with business process re-designs and created training programs for the new processes.

Responsibilities included:

- Analyzed clients' business processes to determine areas to improve and streamline.
- Worked on numerous quality improvement projects.
- Analyzed software for improvements and modifications. Created technical designs for the implementation and migration of these modifications.
- Positions held
  - Systems Engineer Phase I
  - Systems Engineer Phase II
  - Systems Engineer Phase III
- Clients
  - Blue Shield / Blue Cross of New England

Education

- Bachelor of Arts, Westminster College – 1983
- Computer Science, Computer Technology, Pittsburgh, Pa. – 1988
- Certified Functional Consultant PeopleSoft.
- Certified Technical Consultant PeopleSoft.
- Outstanding PeopleSoft Consultant 2004
- Presented at the PeopleSoft Conference, Meet the Experts, San Francisco, CA.

People Certifications

- PeopleSoft Certified Technical
- PeopleSoft Certified Financial Management

Name: Kurt A.

Role: Technical Consultant – HCM – CS - Financials

Overview

- Over 15 years of PeopleSoft experience in design, development, implementation, and support.
- Served on full life-cycle implementations, upgrades, customization and production support projects.
- Demonstrated leadership abilities and broad technical expertise with deep technical knowledge in design, development, support, and implementation of a wide variety of PeopleSoft products and modules.
- Ability to work within a team environment.
- Ability to be flexible and change direction at a moment's notice.
- Excellent customer skills and ability to understand and communicate customer issues
- Strong oral and written communication skills with ability to communicate and interact with management, vendors, business clients, and partners.

ERP Systems Skills

Campus Solutions:	Campus Community, Student Records, Financial Aid, Student Financials, Admissions, Academic Advisement, Transfer Credit, and Courses
PeopleSoft FSCM:	General Ledger(GL), Accounts Payable(AP), Accounts Receivable(AR), Billing(BI), Asset Management(AM), Purchasing (PO), Order Management (OM), Inventory(INV), Workflow (WF), Expenses(EX), Treasury (TR)
HCM:	North American Payroll (NA), Base Benefits, Benefit Administration, Employee Self-Service modules, Recruiting

Computer SKILLS

Operating System	UNIX, Windows, Mainframe
Languages & Tools	PeopleTools 8.52 and lower, PeopleSoft 9.1 and lower, PeopleCode, Portal, Application Designer, Application Engine, Component Interface, Process Scheduler, Security Administrator, Application Packages, Integration Broker, PeopleSoft Utilities, Tree Manager, Data Mover, File Layout, Configuration Manager, Application Server, XML
Reporting Tools	XMLP Publisher, SQR, nVision, Crystal Reports, PS/Query
Database	Oracle, SQL Server, DB2, Informix
Web / Application Server	BEA (Weblogic)

Professional Detail

California State University, Long Beach, CA **December 2013-Present**

Scope: PeopleSoft HCM 9.1 PeopleTools 8.53

Responsibilities:

- Partially developed on-line custom hiring process using PeopleTools and PeopleCode which allows campuses within CSU to hire Temporary Faculty/Adjunct Professors in mass.
- Created custom self-service questionnaire within PeopleSoft for Temporary Faculty to complete once the contract has been initiated.
- Converted the Load to Job SQR (last process to hire Temp Faculty) to a Component Interface and Application Engine.
- Created custom on-line Evaluation Tracking tool and associated report within PeopleSoft for Temporary Faculty.

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Hartford Hospital, Hartford, CT **October 2013-November 2013**

Scope: PeopleSoft HCM 9.1 Implementation/PeopleTools 8.51

Responsibilities:

- Designed custom Huron Consulting outbound interface (Payroll Data) using Application Engine.
- Designed Leave Plan/Leave Accrual conversion process using Application Engine and Component Interface.

CUNY(City University of New York), New York, NY **April 2013-July 2013**

Scope: PeopleSoft Campus Solutions 9.0/PeopleTools 8.52

Responsibilities:

- Production Support for Student Financials, Financial Aid, and Student Records as part of CunyFirst 23 College Implementation project.
- Analyzed and resolved data related errors related to processes and/or setup related to some or all of the following: Tuition Calc, Tuition Controls, Tuition Groups, Student Groups, Course/Class Fees, Payment/Charge Reversals, Payment/Charge Priority, Student Records, Refunds, and Item Types.
- Wrote custom Direct Loan Financial Aid queries by school, aid year, and term.
- Recommended corrective courses of action.

US Army/IBM, Herndon, VA **September 2012-February 2013**

Scope: PeopleSoft Campus Solutions 9.0/PeopleTools 8.52

Responsibilities:

- On-Line and Batch customizations revolving around PeopleSoft Campus Solutions/HCM, Campus Community and Student Records using PeopleTools/PeopleCode, Application Engine, Component Interface, and SQR.
- Added additional Service Indicators for new population of students.
- Modified existing custom SQR/SQC which added/deleted the new Service Indicators for the new population of students.
- Modified existing custom Application Engine and added setup table which directed emails to the resources during the new student population registration.

B&W Pantex/US Department of Energy, Amarillo, TX **February 2012-August 2012**

Scope: PeopleSoft Implementation of FSCM 9.1/PeopleTools 8.52

Responsibilities:

- On-Line and Batch customizations revolving around PeopleSoft Project, Inventory, Purchasing, Receiving, and Manufacturing modules using PeopleTools, PeopleCode, Component Interface, Application Packages, and Application Engine.
- Created custom Project tables and integrated these directly into the components containing the PROJ_ACTIVITY and PROJECT tables for custom processing.
- Created custom Application Package to identify and handle nuclear explosive items outside of delivered PeopleSoft Inventory.

Kutztown University of Pennsylvania, Kutztown, PA **September 2011-January 2012**

Scope: PeopleSoft Campus Solutions Production Support 9.0/PeopleTools 8.5

Responsibilities:

- Modified PeopleSoft delivered TS189 (Student Application) process to account for Admit Term.
- Created custom Instructor Workload Application Engine and PS Query.
- Created custom XML Classlist, Employees, and Student files to FTP to external system.
- Modified PeopleSoft delivered Academic Advisement report (XML Publisher).
- Created custom Instructor Workload Report.

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- Created custom Cross-Listed Courses Report.
- Created custom Instructor Prep/Credit Overload Report.
- Created custom Admissions Report identifying students applying to the University for a given term.
- Modified numerous queries for faculty and business users.

Ingersoll Rand, Davidson, NC **September 2010-December 2011**

Scope: PeopleSoft HCM (Human Capital Management) 9.1/PeopleTools 8.5

Responsibilities:

- Wrote a batch interface using Application Engine to extract personal data, job data, position data, salary, and salary grades from PeopleSoft to a third-party TAM (Talent Acquisition Management) tool, Authoria.
- Created custom pages within PeopleSoft to capture setup data that was passed to the batch interface sent to Authoria.

Elkay Manufacturing, Oak Brook, IL **September 2011-October 2011**

Scope: PeopleSoft FSCM (Financials/Supply Chain Management) 9.0/PeopleTools 8.5

Responsibilities:

- Very short-term project where I modified a custom SQR to accurately reflect Inventory Item pricing when items were featured as part of a Kit as opposed to individual pricing of the items.

DePaul University, Chicago, IL **February 2011-September 2011**

Scope: PeopleSoft Campus Solutions Production Support 9.0/PeopleTools 8.5

Responsibilities:

- Troubleshooting and resolving Production Support tickets for DePaul University. Areas within Campus Solutions including Campus Community, Student Records, Financial Aid, Academic Advising, Admissions, and Student Financials.

UT-SW (University of Texas-Southwestern Medical), Dallas, TX **August 2010-February 2011**

Scope: PeopleSoft Campus Solutions Implementation 9.0/PeopleTools 8.5

Responsibilities:

- Created an Application Engine program which populated a custom table that held Student Health Insurance data and allowed Student Health Insurance link to be displayed on the Student Center.
- Developed a custom Student Financials Self-Service Health Insurance form which allowed students to enter their information on-line. Once the form was completed, 3Cs, the custom table, Service Indicators were updated.
- XMLP report developed allowing the student to keep hard copy of Health Insurance form.
- Created an Application Engine process and custom table to hold student Promissory Note Data and allowed the Promissory Note to be viewable through the Self-Service Student Center page. The student completed the form and upon submission, 3Cs were updated and the student had an option of printing a copy of the completed Promissory Note (XMLP Report)
- Certain Academic Programs at UT-Southwestern Medical required that students having been administered immunizations prior to enrollment. On the Self-Service Student Center page when a student would try to enroll, they would be re-directed through a series of custom built pages which required the student's completion or acknowledgment. Once this had been done, the student would be taken to the PeopleSoft delivered self-service enrollment pages. The next time the student tried to enroll because he/she had completed/acknowledged the immunization forms, the student would instead be taken directly into the PeopleSoft delivered self-service enrollment pages.

VCCS (Virginia Community Colleges System), Richmond, VA January 2010-September 2010

Scope: PeopleSoft Campus Solutions Version 8.9/PeopleTools 8.49.

Responsibilities:

- Created custom pages using Portal PeopleTools and PeopleCode. These pages integrated with delivered Student Records and Enrollment. Used by colleges to validate students who have Veteran status.
- Created custom SQR and Crystal reports tracking Veterans info based on the pages created above, student enrollment, and student grades.
- Created inbound Portal Application Engine interface that reads XML files and updates student's 3Cs and checklists.
- Created custom Application Engine process that assigns student communication (Communication Record) based on run control page parameters.
- Customized Faculty/Instructor Portal Self-Service pages utilizing PeopleTools and PeopleCode to accommodate VCCS business needs.
- Created inbound Portal Application Engine to read state identification inbound file and update VCCS' PeopleSoft system.

North Shore Long Island Jewish Health Systems, NY July 2009-January 2010

Scope: PeopleSoft FSCM Release 8.0/9/0 upgrade Tools Release 8.49, Oracle 10g, UNIX, AutoSys. Modules included: GL, AP, PO, BI, AR, PC, AM, eProcurement

Responsibilities:

- Updated PeopleSoft Portal delivered and client custom processes to ensure compatibility for PeopleSoft version 9.
- Created UNIX shell scripts to FTP files to/from client to hosted Oracle On-Demand PeopleSoft application.
- Updated AutoSys scripts to ensure compatibility including machine names, steps, PeopleSoft processes for version 9.0.
- Tested and resolved any incompatibility issues with PeopleSoft/AutoSys scripting between PeopleSoft 8.0 and 9.0.
- Production support with post-live PeopleSoft Financials Portal 9.0, Oracle On-Demand. Using PeopleTools, PeopleCode, Component Interface (CI), SQR, Oracle 10g.

Boy Scouts of America, TX March 2009- September 2009

Scope: PeopleSoft HCM Release 9.0, Tools Release 8.47, Oracle 10g, UNIX, Authoria

Responsibilities:

- Created an HR interface using SQR and Application Engine extracting PeopleSoft Portal HCM 9.0 data into a pipe-delimited file so that client can import into a third party Talent Acquisition (TAM) tool. (Authoria).
- Used DMS scripting as needed to update, insert, delete data while unit testing.
- Created PS Portal Security roles and permissions for newly created PeopleSoft customizations.
- Created associated run-control page, record, menu, and component using PeopleTools, Portal and PeopleCode for this HR Interface.
- Created a Portal Component Interface to extract data from a third-party tool back into PeopleSoft.

Northwestern University, IL October 2006- December 2008

Scope: PeopleSoft Student Administration (SA)(now called Campus Solutions) 8.22.05-8.49, Oracle 10g Database Customizations, SunOs 5.10

PeopleSoft Upgrade Tools (8.22 to 8.49), Release (8.2 to 9.0)

Modules: Self-Service, Student Records, Student Financials, Financial Aid

Responsibilities:

- Developed 30 custom Portal Self-Service/Student Administration pages (using PeopleTools, PeopleCode, Application Engine, and Workflow) allowing Graduate School students to automatically apply for Degree and Thesis completion (TGS Forms project).
- Created a custom on-line Portal Financial Aid application for all Undergraduate students utilizing PeopleSoft delivered 3C's.
- Used DMS scripting as needed to update, insert, delete data while unit testing.
- Created PS Portal Security roles and permissions for newly created PeopleSoft customizations.
- Developed 5 on-line Portal pages (PeopleTools, PeopleCode) capturing Northwestern's Tuition Payment plans for students.
- Developed a Portal Component Interface (CI) capturing the Tuition Payment Plan from the custom pages to populate the Group Data Entry Component for posting.
- Retrofitted PeopleSoft version 8.22 client Portal customizations to 8.48 Toolset (PeopleTools, Application Engine (AE), PeopleCode, Component Interface (CI) in Student Records, Financial Aid, Student Financials, and Self-Service from the Oracle upgrade lab.
- Retrofitted and updated for version 9 custom PeopleSoft Portal application for Northwestern's School of Continuing Studies Non-Credit program. System provided self-service access from a webpage to the creation of the student in PeopleSoft. All processing was completed behind the scenes various Component Interfaces within Peoplecode.
- Assisted in setup and configuration of Integration Broker which allowed the self-service School of Continuing Studies non-credit to establish his/herself on the LDAP directory by using a synchronous message. Completed through the consumption of a Webservice.
- Developed a bolt-on PeopleSoft CTEC (Course and Teacher Evaluation Council) application using PeopleTools, Rowset Peoplecode and Application Package technologies. This provided an on-line mechanism for students to evaluate courses and instructors.
- Developed several XMLP Publisher reports for the bolt-on PeopleSoft CTEC application including individual instructor and TA reports, and department chair reports.
- Participated in the fit/gap and functional requirements on many new projects listed above.
- Troubleshoot/resolved Production Support issues as assigned.

Amerigroup Corporation, VA **July 2006- October 2006**

Scope: PeopleSoft HCM Upgrade 8.3 to 8.9/PeopleSoft Financials Upgrade 8.0 to 8.9. PeopleTools Release 8.47.05, Windows NT with Microsoft SQL Server.

Modules: Core HR, Benefits, North American Payroll (NA), Absence Management, Time & Labor, Recruiting, Talent Acquisition Manager, ELM, GL, AP, AM, PO

Responsibilities:

- Develop 8 custom HCM Benefits SQR's for Amerigroup including Event Triggers, ABBR Update, and Benefit-Tier Updates.
- Fix, modify, and customize delivered and non-delivered PeopleSoft objects (Core HR, Recruiting, Benefits, Payroll, Time & Labor) to insure compatibility and functionality between PeopleSoft 8.3 and 8.9. Tools used were PeopleTools, PeopleCode, SQR, Application Engine, and Application Packages.
- Created and executed Data Mover Scripts to bring over data from 8.3 to 8.9

Chicago Public Schools (CPS), IL **April 2006- July 2006**

Scope: PeopleSoft 8.9 HCM Implementation (Human Resources(HR), Benefits, Payroll. The environment is PeopleSoft (Tools 8.46, 8.9 Financials Oracle Database on UNIX.)

Responsibilities:

- Participated in Requirements Gathering, Fit/Gap Analysis and initial functional design/customization of CPS' new PeopleSoft HR system.
- Created conversion SQR's to load foundation HR (Location, Department, Salary Plan, Salary Grade, and Job Code) tables.
- Created a SQR to convert Personal Data information from their legacy systems into PeopleSoft.

- Participated in the construction of a SQR that read legacy data and loaded into Oracle conversion staging tables.
- Assisted client in knowledge transfer process. Helped them learn PeopleTools, PeopleCode, Query, and SQR.

Blue Cross Blue Shield, IL **December 2005- February 2006**

Scope: Production Support and on-going system customization/maintenance work of PeopleSoft System. The environment is PeopleSoft (Tools 8.4514, 8.8 SP1 HCM, DB2 database on OS-390 Mainframe.)

Responsibilities:

- Developed a PeopleCode customization within the eRecruit Module to prevent multiple Social Security numbers from appearing in the Identity/Diversity tab in the Job Data Applicant Component.
- Developed a PeopleCode customization within Position Management to prevent on-line errors when trying to reclassify a job to a different department in a different company.
- Developed a SQL data cleanup script that set the Referral Application Date equal to the Applicant Data Application date which resolved buffer errors that occurred when entering applicant data on existing employees.
- Customized a GL Interface SQR to fix an issue where the earnings code was going to the wrong GL expense code.
- Created 4 Application Engine programs which cleaned up the client's Benefit Event Maintenance processing. Prior to this the procedure was completed manually.

Equity Office Properties, IL **September 2005-November 2005**

Scope: The scope of this short-term 2 month project was to implement a custom PeopleSoft HR Stock Administration Module using a combination of the delivered module and custom Equity Office objects. PeopleSoft's Human Resources (HRMS) on (Tools 8.20.13, Application Release 8.3, Microsoft SQL Server 8.00.194.

Responsibilities:

- Translated Functional Specs into Technical Specs.
- Maintained a close working relationship with functional experts in the modification of functional/technical specs, development, system, regression, and unit testing.
- Developed, coded, and unit tested custom and delivered mods throughout all of PeopleSoft's HR Stock Administration and GL Interface modules.
- Worked extensively with Application Designer (PeopleTools, PeopleCode) to modify and/or create record and field definitions, Pages, Components and Menus in the development of the above processes.
- Developed custom Equity Office Properties reports and processes surrounding the HR Stock Administration Module.

City Colleges of Chicago, Chicago, IL **October 2004-August 2005**

Scope: The scope of this project is to implement PeopleSoft's Student Administration (Tools 8.20.05, App 8.2, Oracle 8.17, Unix Compaq TRU64 Unix V5.1B) module including Student Records, Financial Aid, Student Financials, and Campus Community.

Responsibilities:

- Translated Functional Specs into Technical Specs.
- Maintained a close working relationship with functional experts in the modification of functional/technical specs, development, system, regression, and unit testing.

- Developed, coded, and unit tested custom and delivered mods throughout all of PeopleSoft's Student Administration module (Student Records, Financial Aid, Student Financials, and Campus Community).
- Worked extensively with Application Designer (PeopleTools, PeopleCode) to modify and/or create record and field definitions, Pages, Components and Menus in the development of the above processes.
- Developed custom City Colleges of Chicago Financial Aid and Student Record processes using SQR and Application Engine.
- Involved in data and objects migrations across all the database instances uniform and unique (DEV, INT, CN, STG, UAT and Production Environment- PRD)
- Involved in conversion of data to load and unload Student Record Tables using SQR's from the legacy system and excel sheets
- Mentored junior developers by assisting them with questions and development of their assigned modifications.
- Fixed data-related issues across the development and various testing environments using PeopleSoft's Data Mover and Oracle's Export Utility.
- Used FTP utility to migrate developed SQR's to the correct file server.
- Administered/configured Application Server within the development environment when necessary (boot, clean cache, configure configuration file).
- Supported end-users during UAT (Unit Acceptance Testing) and post-production/change management issues.

Baxter Healthcare, IL **August 2004-October 2004**

Scope: Query cleanup and consolidation of user ad-hoc queries within PeopleSoft HRMS. Baxter had given employees free reign in developing queries for reporting and data analysis. The goal was the consolidation of duplicate queries and to establish controls for the creation of further queries. The environment was PeopleSoft (Tools 8.17, Application 8.0) and Oracle 8.14 database.

Responsibilities:

- Analysis of existing user ad-hoc queries surrounding PeopleSoft HRMS including the modules of Human Resources, Payroll, Base Benefits, and Benefits Administration.
- Consolidating and combining duplicate queries across all Business Units.

Hewitt Associates, IL **Jan 2004-August 2004**

Scope: The scope of this project is to implement Sarbanes-Oxley (SOX) controls across the organization to comply with the Federal Government regulations and how it relates to PeopleSoft systems. Specifically PeopleSoft Workflow and a custom calculation tool were implemented for greater financial control across the Time and Charge Entry system.

Responsibilities:

- Designed, developed, coded, configured, unit tested and modified PeopleSoft Workflow for Hewitt's Fee System.
- Designed, developed, coded, configured, unit tested a new tool for associates to assess there percentage of completeness (hours spent, revenue generated) for a specific project.
- Worked extensively with Application Designer (PeopleTools and PeopleCode) to modify and/or create record and field definitions, Pages, Components and Menus in the development of the above processes.
- Closely worked with the development/IS team during the construction of these tools
- Supported end-users during UAT (Unit Acceptance Testing) and post-production/change management issues.

Environment: PeopleSoft 8.4(Financials, HR, Time/Charge Entry), PeopleTools 8.43, PeopleCode, SQR, Process Scheduler, Utilities, Tree Manager, PS/Query, Security Administrator, Informix, UNIX.

Sirva (Allied Van Lines), IL **August 2003-February 2004**

Scope: The scope of this project was to combine two separate Business Units/databases from a merger of two separate transportation/logistical companies. Conversion of SQL Server to Oracle was a part of this process as well. After this was complete on PeopleSoft 7.5, then upgrade the new system to PeopleSoft 8.4.

Responsibilities:

- Executed and fixed application and tools errors from Sysaudit and DDDaudit reports as part of upgrade
- Created SQL, Data Mover, and SQL Loader scripts as part of upgrade.
- Fixed and cleaned up any data/tools related issues to the upgrade.
- Created NT shell script that notified administrator that the Application Server was down.
- Installed and configured the PeopleSoft application including BEA Weblogic server, PeopleBooks, and PeopleTools.
- Installed and configured client workstations with PeopleSoft for end-users.
- Downloaded and applied patches/fixes to PeopleSoft in the upgrade process.
- Created Oracle Export scripts to backup the database on a scheduled basis.
- Created Data Mover scripts to backup specific PeopleSoft data on a scheduled basis.
- Extensively worked with Application Designer to modify the record definitions, Pages, Panel Groups, Menus, Process Definitions, and Security Administrator.
- Worked closely with end users during UAT (Unit Acceptance Testing)
- Worked closely with end users during the conversion of SQL Server to Oracle.
- Modified GL Activity SQR Reports to retrofit in new PeopleSoft 8.4 environment.
- Boot the Application Server when necessary.

Environment: PeopleSoft 7.5, 8.4 Tools (Financials) 8.8 Application Release, PeopleTools, PeopleCode, Tree Manager, SQR, Crystal Reports, Process Scheduler, nVision, Utilities, Oracle, Microsoft SQL Server and Windows NT

National Grid, MA **June 2003-August 2003**

Scope: The scope of this project was the implementation of PeopleSoft 8.4 Financials/Supply Chain at a New England utility company in partnership with a Big Five firm.

Responsibilities:

- Design and coded General Ledger chartfield interfaces using Component Interface, Application messaging and Integration Broker. The external systems were mainframe, 2-tier, or 3-tier type.
- Design and coded GL account validation and derivation interface from external systems into PeopleSoft using Component Interface and Integration Broker.

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Environment: PeopleSoft 8.4 Tools, Application Release 8.8 (Financials, PeopleTools, PeopleCode, Tree Manager, SQR, Component Interface, Application Messaging, Process Scheduler, Utilities, Oracle and Windows NT)

Vitas, Miami FL **March 2003-June 2003**

Scope: The scope of this project was the implementation of PeopleSoft Financials 8.4 with Workflow at a private healthcare company in partnership with a Big Five firm.

Responsibilities:

- Created and implemented a completely custom PeopleSoft Workflow application within the Accounts Payable module which routed the client's vouchers in a systematic and automated fashion.

- Implemented a checking process within PeopleSoft AP to automatically check and flag possible duplicate vouchers for outside vendors (Tools used: PeopleTools, PeopleCode, SQR, Process Scheduler)
- Created within this integrated application the ability to unpost and repost vouchers per the user's request.

Environment: PeopleSoft 8.4 (Financials), PeopleTools, PeopleCode, Tree Manager, SQR, PeopleCode Trace, Workflow, Workflow Administrator, PS/Query, Process Scheduler, Utilities, Oracle and Windows NT

Alliant Energy, Madison, WI **March 2002-September 2002**

Scope: The scope of this project was implementation of PeopleSoft 8.0 Financials, HRMS, and Supply Chain at a regional utility company in partnership with a Big Five firm.

Responsibilities:

- Provided technical analysis including gathering functional specifications, writing and designing the technical specs for the PeopleSoft Payroll to Accounts Payable feeds. Customized an SQR per the client's business needs.
- Wrote SQR interfaces from the client's legacy system into PeopleSoft Time & Labor, HR, Payroll, and Benefits Administration.
- Created web-based pages which allowed the executing of the SQR interfaces.
- Gathered Treasury Module specifications from functional team to write and design technical specifications.
- Created 3 custom SQR's reports within PeopleSoft's Treasury Module to track client's Commercial Paper Transactions.
- Gathered functional specifications from the AP team to design and customize the ACH process within AP to accommodate the client's UNIX directory structure.
- Gathered functional specifications from the Accounts Payable team to write and design a custom SQR that saved the client thousands in bank transaction fees. This SQR combined all of the ACH extract files into one large file for a single transmission to the bank.
- Successfully integration tested and documented the nightly Batch Scheduling process within the Financials and Supply Chain/Manufacturing Module.
- Created an SQL scripts within PeopleSoft projects to fill in missing converted data.
- Integration tested AP inbound and outbound interfaces involving Ariba and telephone feeds.
- Created a PeopleSoft inquiry page within PeopleSoft portal designed to test GL Combo field Edits.

Environment: PeopleSoft 8.0 (HRMS, Financials, Supply Chain), PeopleTools, PeopleCode, Tree Manager, SQR, Crystal Reports, Process Scheduler, Utilities, Oracle and Windows NT

FULL-TIME EMPLOYMENT

PeopleSoft, Inc., **May 1998-February 2002**

Staff Consultant

Clients: Various clients and locations across USA

- Programs, tests, designs, documents, and implements systems and/or software. Applies project and consulting methods and processes. Determines work priorities in accordance with project plans, project schedules, and changing work demands.
- Ensures client needs are met by actively soliciting, identifying and responding to questions, issues, and service opportunities.
- Gathered functional requirements, designed technical specs and developed panels, panel groups, menus, and processes utilizing PeopleTools and PeopleCode.

- Created/customized critical business processes usingSQR and Crystal Reports surrounding the following modules: GL (General Ledger), AP (Accounts Payable), AR (Accounts Receivable), BI (Billing), PO (Purchasing), IN (Inventory), OM (Order Management)
- Enabled security and Process Scheduler allowing the department manager to run these reports on an ad-hoc basis.
- Tested and migrated PeopleSoft objects from the development stage up through Production.
- Provided documentation support to the Technical Writer who created training manuals for the new system.
- Trained management and IT personnel on navigation, troubleshooting, and PeopleTools as part of the knowledge transfer process.
- Gathered functional requirements, designed technical specs and developed interfaces (SQR, Application Engine) from legacy systems to PeopleSoft Billing (BI), Purchasing (PO), Payroll, Benefits Administration(BA), Human Resources(HR), Time and Labor(TL), General Ledger (GL), Accounts Payable (AP), Accounts Receivable (AR), Order Management (OM), Inventory (IN), and Purchasing (PO).
- Executed test scripts using Rational Robot in a structured environment with System/Release Testing team according to PeopleSoft testing methodologies. Platform tested on Oracle, DB2/MVS, and SQL Server environments.
- Provided on-going 24 hour technical Production Support (on and offsite) for nightly financial batch processing.
- Developed UNIX scripts to assist users in executing their daily and quarter-end batch processing leading ultimately to client's ownership of the new system.
- Maintained the clients' Change Control System by synchronizing and migrating the development, testing, and production environments, which prevented system failure.

Computer Sciences Corporation (CSC), Oak Brook, IL 1997 to 1998

- Participated on of a large financial services implementation team rolling out SAP to user's desktops. Debugged Windows and resolved LAN/WAN and TCP/IP issues.
- Coded and fixed ABAP programs on a production support team for SAP Financials.
- Successfully completed mainframe boot camp training for Year 2000 projects.

Education/Professional Training

BA Bachelors of Business Administration, Marketing
University of Wisconsin-Madison

PeopleSoft Technical Certification, PeopleSoft HR, PeopleSoft Asset Management, PeopleSoft Expenses, Business Process Design, nVision Reporting for GL, PeopleSoft Technical/Functional Boot camp, CICS, COBOL, JCL, DB2, SQA Robot, Oracle DBA Certification class

Name: Joseph C.

Role: Technical Consultant – HCM - Financials

Computer SKILLS

SOFTWARE: PeopleSoft Payroll Interface, PeopleTools (Latest version 8.53) Query Access for Web Services, PIA, Financials 9 (Accounts Payable, General Ledger, eProcurement), HCM 9.2, Payroll for North America, Payroll Interface, Oracle, Component Interface, SQR, PeopleCode, Web Service utility, Query/Crystal, SQL, COBOL, Application Engine, PeopleSoft Integration Broker, Workflow, XML Publisher, Data Mover, Unix. PeopleSoft Security. Campus Solutions.

Professional Detail

Kahmehameha Schools **February 2014 to present**

Sr. Developer (HCM 9.1 tools 8.53)

- Configured the PeopleSoft Payroll Interface to work with the ADP Payforce system
- Created an Application Engine/BI Publisher Audit Report
- Assisted in the Fit Gap Analysis phase providing a solutions document for data payroll data transmissions.
- Created an EPIP file creation Application Engine program
- Created Application Engine to modify data from the Payroll Interface before transmitting it to ADP Connection.
- Created custom queries

Alliant Energy **October 2013 to February 2014**

Sr. Developer (HCM upgrade to version 9.2 tools 8.53)

- Reviewed customizations and reapplied approved ones to the new 9.2 version. Customizations were in the form of PeopleCode, Application Engine and SQR code.
- Assisted with configuration migrations using Data Mover and Data Migration Workbench
- Assisted with STAT troubleshooting issues related to Application Package locking

Maryland Courts **May 2013 to October 2013**

Lead Developer (Financials version 9.1- GL, AP, PO)

- Modified Accounts Payable BI publisher check layouts
- Setup Positive Pay processing. This included modification of the Positive Pay Application engine as well as the creation of the automated FTP process to the bank
- Provided QA and project migration support for the team
- Modified Purchase Order creation pages adding custom sub pages and fields
- Created datamover scripts to migrate Purchasing and Accounts Payable control information
- Assisted with Payroll to GL setup
- Assisted with Production support helpdesk tickets related to PeopleSoft issues

Intel Corporation **Jan 2013 to May 2013**

Sr. Developer (HCM version 9.0)

- Provided assistance in troubleshooting and fixing Retroactive pay (NAM) Cobol programs
- Assisted with troubleshooting and fixing Application Engine interfaces from PeopleSoft NAM to Intel third party systems
- Assisted with the creation of Web Services from PeopleSoft Component Interfaces using Integration Broker
- Assisted with the setup of E-Performance

BNP Paribas **August 2012 to Jan 2013**

Lead PeopleSoft Developer (HCM version 9.1 Financials 9.1)

- Provided PeopleSoft System Administration including PIA administration
- Set up the PeopleSoft Payroll Interface to ADP for Canada

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- Assisted with Vendor information cleanup for PeopleSoft Accounts Payable and Purchasing using SQL and SQR coding
- (SOA) Designed and created a PeopleSoft Integration Broker Web Services that called a Component Interfaces using PeopleCode to create XML packets with SOAP wrappers and Integration Broker
- Created several custom Component Interface methods
- Assisted with Production support
- Assisted with setting up the PeopleSoft Payroll to GL Interface process

Madison Square Garden **Jan 2012 to June 2012**

Sr. Developer (HCM version 9.1 Tools 8.51)

- Created a Time Entry Front End system with Time Entry templates for various pay groups and companies at MSG using Application Designer and PeopleCode
- Created Workflow procedures for approvals and notifications of HR based actions such as voluntary terminations, involuntary terminations as well as promotions and department changes
- Modified SQR's to implement Flex Field and Combination rules editing as relates to the MSG PeopleSoft Payroll system and MSG Oracle Financials system
- Created Functional and Technical designs for the above work
- Configured EPROFILE

BNP Paribas **January 2011 to January 2012**

Lead PeopleSoft developer (HCM version 9.1)

- Assisted with PS Admin functions, including maintaining Web Server, Application Server and Process Scheduler functionality
- Created modifications to existing extract SQR's related to Base Benefits and an ADP Payroll feed
- Created component interfaces and Java Applets for the PeopleSoft to ESS and EAF third party Real Time interfaces
- Created several PeopleCode based modifications, related to PeopleSoft position management, Base Benefits and compensation processes
- Assisted with tuning several queries
- Implemented the Portuguese and Spanish language in the PeopleSoft HCM module
- Implemented Global Assignments
- Created Excel to CI processes
- Provided PeopleSoft Security Administration
- Set up the PeopleSoft Payroll Interface to ADP

Advance Auto Parts **July 2010 to January 2011**

Sr. PeopleSoft Technician (HCM version 9.1)

- Created PeopleSoft SmartHire Templates.
- Assisted with Contingent Worker Data loading. This included configuring the PeopleSoft POI model as well as modifying existing custom SQR and Application Engine programs.
- Created work around for HCM to ELM Application Engine (LM_LD_ASYNCH) bug, using PeopleCode and SQL.
- Designed and developed Asynchronous Application Messages to WebSphereMQ for the clients Active Directory processes with a JMS connector for "New Hires" and Person Data modifications

University of Connecticut **February 2010 to June 2010**

Technical Lead (HCM version 9)

- Assisted with troubleshooting bugs and creating fixes using PeopleCode Debugger and Trace files. Also assisted with other Break Fix types of issues.
- Developed interfaces between PeopleSoft HCM 9.0 and Student Admin modules using Application Engine, File Layouts and PeopleCode in an Oracle 11g environment.

- Created Migration, and Development Standards documentation.
- Responsible for QA on this project, providing code reviews for all developers and assisted with PeopleCode and SQL performance tuning.
- Responsible for fixing Paysheet creation Bug for PeopleSoft NA Payroll

U.S. House of Representatives **August 2009 to February 2010**

Sr. Developer (Financials Version 9)

- Assisted with Break fix issues related to custom built Peoplecode, Application Engine and SQR's.
- Created custom reports using SQR and Query Crystal. Reports are for AR, PO and AP
- Created customized Eprocurement EXPRESS FORMS using App Designer
- Assisted in setting up auditing for Vendor Bank information
- Created customized PeopleSoft eProcurement pages
- Created customizations to the delivered AP Voucher entry page using PeopleCode and Application Packages.

Jefferies Bank, Guardian Life Insurance **June 2008 to July 2009**

Technical Lead. (Financials Version 9)

- Set up EDX and PunchOut messages and web services for multiple suppliers including Office Max and SHI.
- Assisted with Troubleshooting errors in PeopleCode processes
- Created customized Eprocurement EXPRESS FORMS using App Designer
- Created Loader Application Engines to load 1 - General Ledger data to be loaded into the Journal Generator. 2 – Accounts Payable data to create Vouchers. 3 – Billing data to create Bills. Used File Layouts with these engines for the External data load.
- Conducted a PeopleTools workshop
- Set up 'Sign On' Peoplecode for Single Sign On processing in an LDAPconfiguration, using a custom record and Peoplecode.
- Assisted with setup for Supplier Contract Management in eProcurement including Contract Document Libraries.
- Created a Guardian eProcurement user default profile process and page. The process also updated User Profile and Security records such as PSOPRDEFN and OPR_DEF_TBL_PM

Madison Area Technical College **September 2007 to March 2008**

Sr. PeopleSoft Consultant (Financials and HCM Version 8.8)

- Created an Engine that would load Purchase orders from a flat file and create vouchers. This engine also added new Vendors if they were not found on the Vendor table. This is for version 9 Financials
- Responsible for all GL and Payroll Interface modifications related to a Bank Change for the client (Chase to USB). (Version 9)
- Modified several Time and Labor pages for Client customizations
- Assisted in troubleshooting version 9 Time and Labor Self Service Time Entry bugs
- Created new business process using PeopleCode for the Accounts Payable single Vendor process
- Assisted functional team with Benefits control data setup for Version 9 Benefits

Chesapeake Energy, Gas Warsaw (Poland) **October 2006 to September 2007**

Lead PeopleSoft Developer (Financials and HCM Version 8.8)

- Responsible for mapping data from existing ADP and custom HR system to the PeopleSoft HR Data Model.
- Modified several PeopleCode events to implement specific Chesapeake business functions.

- Assisted functional staff in creating new configuration data including. Jobcode, Earning code and Action/Action reason codes
- Provided technical specifications resulting from Fit Gap sessions.
- Developed a data loading Application Engine using Component Interface, File layouts and PeopleCode in order to load data into the new PeopleSoft system.
- Created Datamover scripts to export and import Configuration data.
- Modified PeopleSoft GL and Accounts Payable reconcile SQR's to work in the new versions model

- Led a team of 6 developers in development and deployment of modifications to the PeopleSoft version 9 Accounts Receivable and Billing system.
- Created several Interfaces via Application Engine and PeopleCode between custom accounting systems and the PeopleSoft Billing system.
- Implemented several PeopleCode modifications for the PeopleSoft accounts receivable system
- Trained developers in PeopleTools
- Assisted PeopleSoft functional staff in the creation of technical specifications
- Provided PS admin system support and created all Application Server Domains for the project as well as deployed all developer client side PeopleTools sessions.

ING Clarion **March 2006 to October 2006**

Sr. PeopleSoft Developer (HCM Version 8.8 Implementation)

- Designed and developed Data Load Application Engines to load PeopleSoft 8.0 data to the 8.9 Data model, including data translation procedures
- Responsible for the mapping of data between 8.0 and 8.9 Data models
- Responsible for the Setup and Configuration of the Payroll Interface to ADP. This included both Exports and Imports
- Designed and developed various standard documents as well as technical specifications for the project team
- Created 12 Application Engine interface programs related to Benefits 8.9 including interfaces to AETNA
- Modified several PeopleCode events to implement specific ING Clarion business functions
- Modified several 8.9 SQR based Benefit reports including the COBRA report
- Provided PeopleSoft Security Administration

Bank Of New York **October 2005 to February 2006**

Sr. PeopleSoft Designer/Developer (Financials Version 8)

- Designed and developed an Employee Stock Activity Subsystem in PeopleSoft HR 8.9 using PeopleCode, Application Engine and Application Designer
- Assisted in troubleshooting PeopleCode based Salary Planning processes and providing fixes for these processes.
- Modified several in-house SQR extract and reporting programs related to the Banks PeopleSoft HR system

Weils Gotshal and Manges **March 2005 to September 2005**

Sr. PeopleSoft Designer/Developer (HR Version 8)

- Modified the E-Benefits PeopleSoft component. This work entailed the redesign of the 401K pages and logic as well as the E-Benefits summary pages.
- Created several Interface programs using Application Engine.
- Assisted with PeopleCode modifications to the PeopleSoft E-Performance module.
- Created several Workflow processes for the PeopleSoft HR system using PeopleSoft Workflow and Application Engine.

PeopleSoft UK **May 2004 to January 2005**

Sr. PeopleSoft Interface Designer/Developer (HR Version 7)

- Designed and developed Payroll Interface module for PeopleSoft HR (version 8.8) using Integration Broker, Application Engine and PeopleCode (toolset 8.9)
- Created all specifications including functional related to all Payroll related interfaces
- Assisted in the data conversion team creating Component Interface/Application Engine programs for the data transfer processes.
- Assisted in tuning Application Engine programs related to data conversion.

IBM Sweden, Chinese Government Utilities Control June 2003 to April 2004

Sr. PeopleSoft Consultant (Financials and HR Version 7)

- Responsible for the Configuration and modifications of all HR 8.8 Workflow processes for both Base PeopleSoft HR and the PeopleSoft Self Service module
- Created multiple Payroll Interface programs using Application Engine
- Assisted in training several Technical resources in PeopleSoft
- Responsible for customizing Payroll and HR based PeopleCode
- Assessed Global Interface needs for IBM's client, creating development and deployment standards documents
- Created an Integration Broker Publish and Subscriptions Protoype for IBM's client
- Implemented all Patches related to Document Sequencing and Vat processing
- Trained technical team in various areas of PeopleTools including PeopleCode, Tree Manager and Security
- Tuned Queries and background processes related to the Supply Chain Module
- Supported the Accounts Payable and General Ledger functional group by creating customizations utilizing PeopleCode, Application Engine and Integration Broker in a PeopleSoft 8.8 Financials Application with a 8.42 toolset.
- Assisted functional team in creating customization specifications for developers

Phillips Electronics February 2003 to June 2003

Sr. PeopleSoft Consultant (HR Version 8)

- Assisted in the upgrade of the PeopleSoft HR 7.5 system to PeopleSoft 8
- Review of compare reports
- Installation of the WebLogic Server
- Installation of PeopleTools 8.42
- Creation of Demo and Development Databases (Oracle 8.1.7)
- Lead SQR team in modifying programs to be migrated to the 8.8 environment

Dutch RailRoad,Akzo Nobel,ELKAY Inc January 2002 to January 2003

Sr. PeopleSoft Consultant (CRM and HR Version 7)

- Created an Application Messaging interface between the PeopleSoft CRM 8.4 system and an external MQ Series based Ticketing system using Integration Broker and the SOAP protocol.
- Created Interface between PeopleSoft CRM and external administration system using PeopleSoft 8.4 Component Interface.
- Assisted in setting up PeopleSoft CRM 8.4 Security. Work entailed creation User Profiles, Roles and Permission Lists.
- Applied several CRM patches.
- Customized several business processes using PeopleCode.
- Conducted PeopleTools I and II classes.
- Assisted in troubleshooting Application Server bugs.
- Assisted in HR support, including troubleshooting Payroll problems and applying fixes via PeopleSoft patches and internal PeopleCode workarounds.
- Created custom PeopleSoft 8 pages for on-line archived data retrieval using Application Designer 8.

- Performed Payroll Tax upgrades.
- Customized Application Engine 8 based Voucher Posting Process.
- Created SQR extract programs for the State Tax Audit project.

BASS Hotels, Andersen Consulting **August 2000 to August 2001**

Sr. PeopleSoft Consultant (Financials 7)

- Upgrade reports and the SYSAUDIT, DDDAUDIT and Alter Audit utilities via the Application Upgrade Assistant, making any modifications to the PeopleSoft system structure needed.
- Assisted in running scripts to update Application data and PeopleTools tables.
- Managed team to design, develop and deploy a Purge and Archival subsystem for all PeopleSoft Financial modules.
- Creation of detail design specifications and development standards for the technical team.
- Developed design standards for the future development of Purge and Archival procedures.
- Provided functional analysis assistance for the design phase of the project.
- Implemented fifty PeopleSoft Accounts Payable VAT and Document
- Provided Troubleshooting support during patch installation, including debugging new PeopleSoft COBOL programs and Stored Procedures related to the Voucher Batch Editing and Pay cycle processes.
- Provided performance tuning for In-House SQL scripts.

Bear Stearns, Columbia House **July 1999 to August 2000**

PeopleSoft Consultant (Financials Version 7)

- Created a Vendor Invoice Tracking Interface using SQR and Application Designer and Query/Crystal.
- Created an Upload Garnishment Voucher Interface using EDI Manager and Application Designer for the PeopleSoft Accounts Payable Module.
- Performed a TOOLS upgrade from 7.01 to 7.06.
- Performed Tax Updates for the PeopleSoft HR group.
- Responsible for all Troubleshooting and Enhancements to the PeopleSoft Purchasing system, including patch installation, and functional level support.
- Created a Modification Tracking Module used to enter requests for service and track status of all enhancements or fixes within the PeopleSoft Financial system. This module was built using Application Developer, PeopleCode and SQR.
- Modified PSWeb Deploy programs, using HTML programming.
- Created various new reports using SQR and QUERY/Crystal, including new Accounts Payable Check printing programs with OLE linked signatures.
- Work included troubleshooting Accounts Payable and Purchasing problems, providing fixes, or applying patches including SQL scripts created in INFORMIX for cleaning tables of corrupted data.
- Implemented several performance-related enhancements to PeopleSoft General Ledger and Accounts Payable functions.
- Provided functional assistance for end users in PeopleSoft Accounts Payable and Purchasing modules.

TACT Consulting and Software **January 1999 to JULY 1999**

Project Manager (Financials Version 7)

- Managed PeopleSoft technical team. This team was responsible for the migration of all General Ledger data into PeopleSoft GL 7.5 using SQL, Import Manager and SQR programs, troubleshooting any PeopleSoft related problems and the installation of any required patches to the system.
- Assisted in the creation of all PeopleSoft /SQLSERVER database instances on an NT operating system.

- Created an ADP and Billing system interface module to PeopleSoft General Ledger 7.5, including an ADP data mapping maintenance section. This work was done using SQR, PeopleCode and Application Designer.
- Created and maintained all TUXEDO domains.

First Boston **August 1998 to December 1999**

PeopleSoft Consultant (HRVersion 7)

- Developed a new SQR U.S. Payroll Activity report.
- Responsible for the enhancements of several PeopleSoft delivered SQR's.
- Built a Department and Location Tree Flattener SQR, to be used by all Custom built reporting applications.
- Developed a configuration file Builder, for use by all PeopleSoft HR report SQR,s.
- Assisted development team in troubleshooting and tuning custom built SQR's.

Sullivan and Cromwell **August 1996 to December 1998**

PeopleSoft Developer and System Administrator (HR and Financials Version 5 and 7)

- Position entailed the design and development of a Lawyer Salary and Bonus Repository with a Payroll Interface. This system was developed using a PeopleTools 7.1 tool set, with an ORACLE 7 RDBMS. All reports were developed using Query/Crystal. Supported ORACLE database creation and administration
- For both PeopleSoft HR and Financial systems, including the development of a backup and recovery procedures and ORACLE SGA performance tuning.
- Performed various record and panel modifications to delivered PeopleSoft HR package. Assisted in initial Data Conversion from legacy system to PeopleSoft
- Database using COBOL and PeopleSoft Import Manager. Assisted in HP UNIX system administration including periodic Full Filesystem backups. Developed SQR reporting and Data manipulation programs for the Benefits, Personal and Payroll components of the PeopleSoft HR system. All PeopleSoft projects required user contact and interviewing.

Education/Professional Training

Brooklyn College, Bachelor Degree, Computer Science

Name: Robert E.

Position: Technical Consultant – FIN/HCM/SCM/CRM

Overview

Bob has more than 15 years technical- functional experience in Public Sector, Higher Education, and Heathcare doing PeopleSoft implementations, upgrades, and training. His areas of expertise include: PeopleSoft Financials, HCM, SCM and CRM. He has filled such positions as: PeopleSoft Trainer, UPK Developer, Instructional Designer, and Business Analyst.

Professional Summary

CLIENT	ROLE	PROJECT TYPE	DATES
MedStar Hospitals	Support and Trainer	All Financial & SCM Module support	10-13 to 12-13
TVA	UPK Developer and Upgrade Support	Migrate 50 Legacy Systems to PeopleSoft	3-2013 to 10-2013
MaxIT Healthcare	Senior Consultant		1-2012 to 3-2013
State of Georgia	Senior Consultant	Migrate Legacy Systems to PeopleSoft	3-2008 to 2-2009
City of Raleigh	Senior Consultant	Migrate Legacy Systems to PeopleSoft	2-2009 to 7-2009
RSI	Senior Consultant		7-2009 to 11-2011
County of Nassau, NY	Senior Consultant	Migrate Legacy System to PeopleSoft/OCM	11-2011 to 1-2012
MTA Bus Company	PeopleSoft HCM/Financials Trainer	PeopleSoft Implementation	1-2008 to 3-2008
City of Minneapolis	UPK Developer	PeopleSoft Financials Implementation	11-2007 to 12-2007
State of Delaware	Senior Consultant	Migration to PeopleSoft	10-2006 to 8-2007
Bay Area Rapid Transit	Trainer/Documentation Specialist	PeopleSoft Financials Implementation	8-2007 to 11-2007

PeopleSoft Application Expertise

- General Ledger
- Accounts Payable
- Accounts Receivable
- ADDIE
- Asset Management
- Purchasing
- Billing
- Budgets
- Inventory
- Projects and Grants
- Project Costing
- Business Process Redesign
- HCM
- Payroll, T&L
- Absence Management
- Campus Solutions
- Employee Self-Service
- CRM

Technical Expertise

- Query
- Help Desk
- UPK
- Test Scripts
- PeopleTools 8.51, 8.52
- SQL Server
- Outlook Integration

Professional Detail

MedStar Hospitals **Oct 2013 to Present**

- PeopleSoft Trainer and Support for All Financial & SCM Modules

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TVA **Mar 2013 to Oct 2013**

- Working at Public Sector Client taking 50 Legacy Systems to PeopleSoft
- PeopleSoft HCM UPK Developer
- Create instructional training design documentation and functional training for Client's staff.
- PeopleSoft 9.1 experience
- UPK 11.x Developer
- Payroll, HCM Core,Benefits, MSS,ESS, ELM
- OCM Communications

maxIT Healthcare **Jan 2012 to March 2013**

Role: Senior Consultant

- PeopleSoft FI/SC/HCM Trainer and instructional design, ePro, Inventory, PurchasingCreate instructional training design documentation and functional training for Client's staff.
- PeopleSoft 9.1 experience, 3 separate projects.
- UPK 11.1 Developer
- OCM Communication & Planning
- PeopleSoft Sales

City of Raleigh/ State of Georgia/ RSI/CMA **March 2008 to Jan. 2012**

- PeopleSoft Financials/Student Administration/ HCM/Financial Trainer/UPK Developer

State of Georgia **3/2008 to 2/2009**

- Legacy systems to PeopleSoft/OCM

City of Raleigh **2/2009 to 7/2009**

- Legacy systems to PeopleSoft

RSI **7/2009 to 11/2011**

- PeopleSoft UPK Developer/PSFT Financials SME

County of Nassau, NY Legacy Systems to PeopleSoft/OCM

- Expert UPK Developer
- Responsible for developing the training material and training client trainers and end users for the implementation of PeopleSoft 9.0 for a large state government. Produced the training materials for PeopleSoft ePro, Project Costing, Strategic Sourcing, Inventory, Purchasing and Supplier Contracts. Created the training material for PeopleSoft Navigation.
- Created and Developed UPK material for PeopleSoft ePro, Strategic Sourcing, Purchasing and Supplier Contracts. Instructional Design, ADDIE
- SQL Server Expertise Writing Code
- Produced movies for PeopleSoft Navigation with the use of screen recorders.
- Trained the Trainer's in the functionality of PeopleSoft ePro, Purchasing, Strategic Sourcing and Supplier Contracts. ELM Support.
- Testing Lead
- Trained end users on PeopleSoft Student Administration with focus on evaluating course credit transfers, calculate academic statistics and report results, providing for transcript production and processing of multiple requests, establishing customized grading guidelines, record maintenance and organization and maintaining the course catalog, enrollment and grading information.

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Fax# 303.802.5201

Name: Robert E.

Position: Technical Consultant – FIN/HCM/SCM/CRM

- Trained end users on PeopleSoft ePro, Purchasing, Project Costing, Navigation and Strategic Sourcing, PeopleTools, Payroll, Absence Management, Time and Labor, Employee Self Service.
- OCM Planning and Communications

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MTA Bus Company **Jan. 2008 to March 2008**

PeopleSoft HCM/Financials Trainer

- Produced training material and taught End Users and other Trainers.
- Responsible for developing the training material for the implementation of PeopleSoft 9.0 for a large New York City bus company.
- Produced the training material for PeopleSoft Inventory and PeopleSoft Navigation.
- Taught HCM including Payroll, Absence Management and Time & Labor
- SQL Server Expertise Writing Code
- Trained end users on PeopleSoft Inventory. Held 16 separate classes teaching Warehouse Personnel, Shipping and Reporting, Inventory Auditing and Stock Picking. Taught a total of 160 end users.

City of Minneapolis, MN **Nov. 2007 to Dec. 2007**

UPK Developer

- Implemented PeopleSoft Financials 9.0 Inventory and Assets for a public sector client. Completed development work early and under budget.
- Developed the UPK content and training material for PeopleSoft 9.0 Inventory and Assets.
- Change Management
- Introduced desktop screen recorders to maximize delivery time of UPK development.
- HCM ESS & MSS

State of Delaware / Bay Area Rapid Transit (BART) **Oct. 2006 to Nov. 20007**

- Worked at State of Delaware from 10/2006 to 8/2007 took 80 legacy systems to PeopleSoft
- Worked at BART from 8/2007 to 11/2007
- Trainer/Documentation Specialist/UPK
- UPK Expert
- Implemented a number of PeopleSoft Financials 8.9 and 9.0 modules for public sector clients. These modules included General Ledger, Accounts Payable, Accounts Receivable, Inventory, Assets, Grants, Budgets, Expenses, Time & Labor, Projects and Contracts, .
- Trained end users on PeopleTools, ELM support
- Trained Users on SQL Server.
- Gathered all of the as is documentation and prepared the documentation including Visio's.
- Developed the UPK content for training for all Financials modules.
- Introduced desktop screen recorders to maximize delivery time of UPK development.

Multiple Client Sites **June 1998 to Oct. 2006**

Role: Senior CRM Functional Consultant

- Worked with clients in the private and public sector to implement PeopleSoft CRM version 8.4 through 8.9. Modules included Order Capture, Help Desk, HR Help Desk, and Order Capture Self Service.
- Gathered and identified requirements.
- Developed implementation strategies based on the client's business requirements and prepared project status reports and updates.
- Assisted in the development and review of training manuals for end user training classes.
- Trained end users on PeopleTools
- SQL Server Expertise Writing Code.
- Developed end user training documentation and provided support to trainers during training sessions.

Name: Robert E.

Position: Technical Consultant – FIN/HCM/SCM/CRM

- Set up test environments to test application setup and functionality.
- Tested conversion programs to insure data integrity during conversion of historical data.
- Identified customizations and defined functional design of business requirements.
- Prepared project estimates and proposals.

Education

- Mayfair College
- Business Administration

Name: John E.

Role: Functional Consultant – Financials

Overview

Before becoming a consultant, John had eighteen years functional experience covering all areas of accounting, financial management and business administration of heavy construction, engineering and environmental projects performed worldwide. In addition to his extensive management, accounting and project controls experience, John has over 14 years of experience working in all phases of major PeopleSoft implementations for a variety of clients. John's experience in implementations includes requirements analysis, project planning, implementation and testing, reporting and post implementation support. He possesses strong communication skills and the ability to interface with client personnel at all organizational levels. John successfully led numerous PeopleSoft Financials implementations and has implemented most major components of the PeopleSoft Financials product. He has implemented PeopleSoft for complex, multi business unit entities and has extensive experience developing and implementing conversion programs for legacy data. He has performed and supported development of system modifications to accommodate client requirements not met by PeopleSoft. He has extensive experience with functional integration between PeopleSoft FSCM, HCM and CS products. He has very strong transactional accounting experience with many areas of financial accounting including payroll, accounts payable, purchasing, billing, project cost accounting and variance analysis, periodic reporting and auditing.

Professional Summary

CLIENT	ROLE	PROJECT TYPE	Dates
UNC Chapel Hill	Commitment Control	PeopleSoft Implementation	04, 2013
UC Santa Barbara, Santa Barbara, CA	Project Costing	PeopleSoft Implementation	01/2013, 03/2013
Boise State University, Boise, ID	Lead for GL, AP, PO and EX	PeopleSoft Upgrade	04/2012, 11/2012
Illinois Central College, Peoria, IL	Finance Functional Lead	PeopleSoft Upgrade	07/2011, 03/2012
Kamehameha Schools, Honolulu, HI	Finance Functional Lead	Project Analysis, Modeling and Recommendations	02/2011, 09/2011
University of Texas at Dallas	Finance Functional Lead	PeopleSoft Implementation	08/2009, 01/2011
Frederick Community College, MD	Finance Functional Lead	Chartfield redesign/update	02/2009, 03/2009
University of New Orleans, LA	Finance Functional Lead	PeopleSoft Upgrade 7.5 to 8.8	07/2008, 02/2009
Azusa Pacific University, CA	Finance Functional Lead	PeopleSoft Implementation	04/2008, 06/2008
LDS Business College, UT	Finance Functional Lead	PeopleSoft Implementation	01/2008, 03/2008
Brigham Young University, HI	Finance Functional Lead	PeopleSoft Implementation	04/2007, 01/2008
Capella University, MN	Finance Functional Lead, Budgets & Expenses	PeopleSoft Implementation	04/2006, 04/2007
University of Minnesota, MN	Functional Scope Development	PeopleSoft Implementation	01/2006, 02/2006
Brigham Young University,	Finance Functional Lead	PeopleSoft Implementation	6/2005. 8/2006

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Name: John E.

Role: Functional Consultant – Financials

CLIENT	ROLE	PROJECT TYPE	Dates
HI			
University of Maryland University College, MD	Finance Functional - AM and Budgets	PeopleSoft Implementation	10/2004, 5/2005
University of Baltimore, Baltimore, MD	Finance Functional - Reporting	PeopleSoft Implementation	01/2004, 09/2004
Mira Costa Community College, North San Diego County, CA	Finance Functional Lead	PeopleSoft Implementation	01/2003, 12/2003
Academy of Art College, San Francisco, CA	Finance Functional Lead	PeopleSoft Implementation	06/2002, 12/2002
Louisiana Community and Technical College System, Baton Rouge, LA	Finance Functional Lead	PeopleSoft Implementation	11/2001, 05/2002
Long Beach City College, Long Beach, CA	Finance Functional -Budgets	PeopleSoft Implementation of additional functionality	06/2001, 10/2001
Indiana Department of Environmental Management, Indianapolis, IN	Finance Functional – Project Costing	PeopleSoft Implementation	11/2000, 05/2001
Butler University, Indianapolis, IN	Finance Functional Lead	PeopleSoft Implementation	08/1999, 10/2000
Northern Illinois University	Finance Functional Lead – NIU Foundation	PeopleSoft Implementation	01/ 1999, 07/1999

PeopleSoft Application Expertise

PeopleSoft Financial Management –

General Ledger (Commitment Control), Purchasing, Payables, Budgeting, Asset Management, Receivables, Billing, Projects, Expenses and eProcurement, Approval Workflow Engine, Integration Broker

PeopleSoft Campus Solutions –

Student Financials

Technical Skills

PeopleSoft PeopleTools, PeopleSoft Application Designer, nVision Report Writer, Crystal and SQR

Professional Details

UNC Chapel Hill, Chapel Hill, NC

- UNC Chapel Hill is a public post-secondary school.
- John is working on a new implementation of PeopleSoft Financials. His responsibilities include development of strategies and configuration needed to manage several subsets of Revenue and Expense Budgets established at a wide variety of levels. John is also supporting development of the design and creation of Combination Editing rules.

UC Santa Barbara, Santa Barbara, CA

- UC Santa Barbara is a public post-secondary school.
- John worked on a new implementation of PeopleSoft Financials replacing an old Main Frame based application. John was responsible for developing an interim solution to their Main Frame Facilities Maintenance Recharge accounting effort using PeopleSoft Project Costing.

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Boise State University, Boise, ID

- Boise State University is a public post-secondary school.
- John supported their upgrade from release 8.8 to release 9.1. John's areas of responsibility include GL, AP, PO and EX. A complete review of the functionality new to 9.1 was performed. All existing customizations were reviewed for applicability to the 9.1 release. Business Process changes and use of functionality available in 9.1 allowed a significant reduction in total customizations used. Supported the project from the discovery phase through the inittial Test Move, Base Configuration and scoping of new/revised customizations.

Illinois Central College, Peoria, IL

- Illinois Central College is a public post-secondary school.
- John supported their upgrade from release 8.8 to release 9.1. A complete review of the functionality new to 9.1 was performed. Based on that review, John also supported their implementation of additional modules. Those modules included Asset Management, Accounts Receivable and Billing.

Kamehameha Schools, Honolulu, HI

- Kamehameha School is a privately governed institution comprised of three campuses serving students in grades K – 12. Kamehameha also operates 30 preschool sites statewide. The three campuses enroll over 5,000 students and an additional 23,000 are served annually through community-based and scholarship programs, and collaborations with educational and community organizations.
- John represented the Financial Management component in an analysis of the Common Data Elements between the three major Oracle/PeopleSoft databases, Financials, HCM and Campus Solutions in version 9.1. In addition to establishing data standards and modeling how these elements are used in the Financials database; John assisted Kamehemeha Team members in establishing the scope of their Financials Management implementation, defining the resources needed and building an initial Project Plan to define the project elements and timeline.

University of Texas at Dallas

- UT Dallas is public post-secondary school.
- John led the consulting effort on a new implementation of release 9.1 General Ledger, Payables, Purchasing, Asset Management, Expenses, Accounts Receivable and Billing. New functionality implemented included AWE based workflow and Chartfield based row level security. Supported setup of interfaces to concurrent implementation of HR and update of existing Campus Solutions GL Interface setup. Commitment Control was established for all modules using multiple ledgers with various levels of Control.

Frederick Community College, MD

- Frederick Community College is a public post-secondary school.
- John supported both functional and technical aspects of their Chartfield redesign/update project. Revised Department and Account values were restated from inception to date in both the Finance and Campus Solutions databases. Work included programmatic identification of affected tables where any of these field values were used under a variety of field names. Supported move to production and subsequent testing.

University of New Orleans, LA

- University of New Orleans is a public post-secondary school.
- John supported performance of functional aspects of their two step Financials upgrade from release 7.5 to 9.0. Modules upgraded included General Ledger, Purchasing, Payables

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and Receivables. Work performed in addition to upgrade steps included end user familiarization, Fit/Gap, Commitment Control design and Workflow design/configuration.

Azusa Pacific University, CA

- Azusa Pacific University is a private post-secondary school.
- John supported implementation of the Purchasing and ePro modules during a Phase I implementation of PeopleSoft Financials 9.0. Additional modules being implemented included G/L and A/P and a Full Suite implementation of Campus Solutions. John's work included base configuration and setup of Purchasing, design and setup of ePro workflow, Application Messaging interface to Campus Solutions and custom interfaces for Bank of America bank statement data and paid checks data from a 3rd party ProBusiness file. He also configured base permission lists for Security on all Financials modules.

Brigham Young University, HI

- Brigham Young University, Hawaii is a private post-secondary school.
- John provided technical and functional support for the implementation of the Expenses Module into an existing PeopleSoft 8.8 Production environment. Work included Fit/Gap analysis, system configuration, design and development of the migration strategy including data mover scripts. Interface with BYUH's travel card vendor Wells Fargo (VISA) was also setup. While there John also wrote the Balance Sheet and Income Statement Reports and numerous supporting schedules using nVision.

LDS Business College, UT

- LDS Business College is a private post-secondary school.
- John provided technical and functional support for the implementation of Asset Management, General Ledger, Accounts Payable and Purchasing modules of PeopleSoft Financials 8.9. John also defined and setup the G/L Interface to an existing Campus Solutions 8.0 database. This implementation included performing Asset Conversion using Component Interface, configuration of Application Messaging and development of various Financial Statement reports using PS nVision.

Capella University, MN

- Capella University is a public post-secondary school.
- John supported the PeopleSoft EPM Planning and Budgeting 8.9 implementation. This implementation included setup for Position and Asset Budgeting. Extensive setup for use of the Flexible Formula method was also performed. This was followed by implementation of PeopleSoft Financials Expenses 8.9. This implementation included Application Messaging and other setup for interface with PeopleSoft HR. John also supported a project to retroactively modify the SETID and BUSINESS_UNIT values established by PeopleSoft during their earlier Lab implementation. John provided functional and technical support for the base configuration, security and workflow design for the implementation of PeopleSoft Expenses into an existing Financials Production environment. He also supported design of a business process for distribution of management level nVision reports.

University of Minnesota, MN

- University of Minnesota is a public post-secondary school.
- John supported the G/L team on a PeopleSoft Financials 9.0 implementation occurring as a follow on to the Student Administration and HR implementations. He developed

several business process flows. He provided guidance on developing commitment control strategies and methods that could be used to segregate accounting for GASB compliant transactions. He also provided expertise to assist in identifying functionality gaps that may be present and proposed methods to address those gaps.

Brigham Young University, HI

- Brigham Young University, Hawaii is a private post-secondary school.
- John led the Financials portion of a Phase I PeopleSoft 8.8 implementation also involving Student Administration and HR/Payroll. John performed database setup and configuration to support the basic functionality in the installed modules. He also created a legacy Fixed Asset Conversion process. John developed a custom Requisition Workflow method that used the Department and Account Chartfield data to route documents to the appropriate worklist user. He also created Commitment Control Security views to support easily maintained dynamic security rules for Commitment Control.

University of Maryland University College, MD

- University of Maryland University College (UMUC) is a public post-secondary school.
- John performed database setup to support separate Fixed Asset accounting for operations in Europe, Asia and the United States. Supported conversion of legacy Asset Data from various Excel and SQL based applications. He also performed initial setup and modeling for a Budgets 8.8 implementation utilizing Financial Ledger data and Position Data from HR.

University of Baltimore, Baltimore, MD

- The University of Baltimore (UB) is a public post-secondary school. Collectively UB has 1,500 employees supporting 5,000 students on three campuses.
- John provided post implementation support in numerous areas including enhancing reports by developing numerous nVision report drilldown layouts and creating underlying views to more efficiently present the detailed transactional data for end users. He also redesigned the commitment control ledgers to facilitate improved reporting and budget management and he setup year-end closing and restructured combination editing rules to significantly reduce row count in the combo data table.

MiraCosta Community College, North San Diego County, CA

- MiraCosta Community College (MCCC) is a public post-secondary school. Collectively the MCCC has 800 employees supporting 6,800 FTE students on three campuses.
- John led the Financials portion of a PeopleSoft implementation following the completion of the HR and SA projects. He proposed and implemented the use of multiple ledgers to facilitate simultaneous reporting of Fund accounting and GASB 34/35 accounting methods. This implementation included converting asset data from their File Maker Pro system that did not previously address depreciation. He also developed a methodology for interfacing Student Refund data from SA 7.6 to Financials 8.4.

Academy of Art College, San Francisco, CA

- The Academy of Art College (AAC) is a private post-secondary school. Collectively the AAC has 1,500 employees supporting 12,000 students.
- John led the Financials portion of a prototype implementation of PeopleSoft Student Administration at the AAC. He created a system prototype with a single Business Unit in each module. He proposed and setup a Commitment Control strategy that provides needed annual control and monthly reporting of variances. He converted vendor, ledger and asset data from their legacy system.

Louisiana Community and Technical College System, Baton Rouge, LA

- The Louisiana Community and Technical College System (LCTCS) is a public post-secondary system encompassing seven community colleges and 42 technical colleges throughout Louisiana. Collectively the institutions in the LCTCS have 3,000 employees supporting over 35,000 students.
- John led the Financials portion of a Phase I implementation involving PeopleSoft HR and SA. He conducted Fit/Gap sessions and designed a new chart of accounts to be used by all schools. He assisted the client with definition and setup of control table values supporting five separate business units for each module with additional business units for Purchasing, A/P and Asset Management for each of the eight technical college districts. He developed year-end closing rules and consolidation elimination entries. He also supported the design of an A/P and Purchasing approval process and related Workflow, and converted 24,000 assets from the State Asset Management system to PeopleSoft.

Long Beach City College, Long Beach, CA

- Long Beach City College (LBCC) is a two-campus district in Southern California with nearly 30,000 students.
- John led the Phase II implementation of the Budgets module. He conducted the Fit/Gap analysis and developed a prototyping strategy for the initial implementation. He assisted the client in designing trees to support the desired distribution of budget data to budget users and established base setup for Budgets. John developed a modification to support using the program Chartfield as a Budget Center Dimension in addition to Department. He also created Folio View based documentation of the entire Budgets business process, incorporating client specific panel shots and instructions.

Indiana Department of Environmental Management, Indianapolis, IN

- The Indiana Department of Environmental Management (IDEM) administers numerous permitting and licensing programs and manages extensive projects associated with environmental remediation and cleanup.
- John led the Phase II implementation of the Projects module. He conducted Fit/Gap analysis and developed a prototyping strategy for initial implementation of IDEM's Air Permit Program. He established the base setup of the project's business unit and designed a business process to capture project cost information in Purchasing and A/P transactions and for the interface to Billing. He developed a modification to allow POs based on releases of approved contracts to retain approved status when changed, if the changes did not include addition of PO lines associated with anything other than the original referenced contract

Butler University, Indianapolis, IN

- Butler University is a private college with 500 employees serving 4,000 students on a single campus.
- John led the Financials components of a Phase I implementation that also involved PeopleSoft HR and SA products. He conducted Fit/Gap analysis and developed the project plan, defined and setup control table values for each module, and implemented Workflow for A/P and Purchasing modules. He also setup EDI manager to import Procurement Card and Bank Reconciliation data. He established a ledger specifically for the management of endowment investments and allocations to create summary entries to the standard accounting ledger.

Name: John E.

Role: Functional Consultant – Financials

Northern Illinois University

- Northern Illinois University (NIU) is a public, post-secondary educational institution with over 5,000 employees and 23,000 students.
- John led the Phase I Financials implementation effort for the NIU Foundation, a separate legal entity conducting fund raising and endowment management on behalf of the University. He defined and setup Chartfields and installation options, test case requirements, and conducted system testing. He built database queries and reports needed to perform data validation and conversion during testing, initial upload to production and parallel processing phases. He also developed supplemental queries and nVision reports needed for customer specific reporting and analytical requirements.

Rocky Flats Environmental Technology Site, Denver, CO

- Rocky Flats is a former nuclear research and nuclear warhead production facility managed by private contractors on behalf of the U.S. Department of Energy. The environmental cleanup and remediation efforts performed at this facility involve 3,000 direct-hire employees and numerous subcontracts.
- John managed the Projects portion of a site wide Phase I PeopleSoft implementation for the prime and four first tier subcontractors working at the RFETS facility. He analyzed structural setup options for the PS Projects module to facilitate minimizing customization of the product and changes to data elements used in previous project cost accounting systems. He analyzed interfaces with other PeopleSoft modules; designed, tested and implemented Projects level indirect cost pooling and allocation for two different tiers of contractors. He developed data feeds used in support of external cost analysis and reporting systems and performed end user training.

Education/Certifications/Training/Presentations

- B.S., Accounting & Real Estate, Boise State University, Boise, Idaho
- A.S., Machine Tool Technology, Boise State University, Boise, Idaho
- Certified Public Accountant (CPA)
- PeopleSoft Financials 9.0 General Ledger Certified Expert Consultant
- Oracle OPN Certified PeopleSoft Financials specialist

References

Name: Dana D.

Role: Functional Consultant – Financials - Grants

Overview

Providing a high degree of qualitative and quantitative analytical skills in analyzing, evaluating, and improving the efficiency of internal financial/administrative operations, organizations, and management to contribute successful operational practices through programmatic, fiscal, and administrative management with the objective of integrating systems and shared services, maximizing value and minimizing cost through consolidation of common tasks: as well as providing direction relating to financial management of a Federal and/or private sector financial program, engaging and managing various projects, overseeing day-to-day operations, coordinating and monitoring activities performed on projects to ensure that business and project goals and objectives are accomplished within schedule and budget, and Providing financial review to financial programs that involve annual certification of internal financial controls.

ERP Systems Skills

- Implementation Experience with the following implementation areas:
  - Developing functional specifications for reports
  - Developing and reviewing system documentation/procedures
  - Data conversion/data cleanup on FoxPro systems
  - Scope Change Control/Management
  - Project Administration
  - Conducting user training
- PeopleSoft Module Experience PeopleSoft 9.1, 8.8, 8.4, 8, (with an excellent end user consultant perspective)
- Financials Implementation of 9.1 – Grants, Projects, Contracts, Billing, Receivables, Commitment Control, Banking/Treasury, Cash Management
- AR/Billing – Process bills, Purchasing, AM, GL – Journal Entry, AP, Purchasing, eProcurement, Inventory & OM
- HRMS – Human Resources, Payroll, Benefits Administration, Budget Encumbrance,
- Financials & Grants – Commitment Accounting, Grant Management, Accounts Receivable, General Ledger, Project Costing. Executing test cases within the Proposal and Awards business process. (Enter awards and proposals)
- Distribution (Billing, Inventory, Order Management, Purchasing)

Technical Experience

- Contracts and Grants Administration
- Financial Systems Implementation
- Program/Project Management
- Post-Award Management of Extramural Funds
- Effort Reporting/Cost Transfers
- Business Analysis
- Federal regulations, guidelines and practices
- ISO 9001 – 2000 Compliance
- Cost Containment
- Statutory and GAAP reporting requirements
- Technical User Manual Development
- Policy Interpretation
- Government cost accounting standards (CAS)
- OMB circulars A-21, A-122, A-133
- Marketing and Outreach
- Higher Education and Hospital Administration
- Program/Project Management
- Social & Community Service

Computer SKILLS

Proven proficiency in microcomputer applications and Business Objects

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Name: Dana D.

Role: Functional Consultant – Financials - Grants

PeopleSoft Financial Systems SharePoint Powers System-DSI Vendor Management Systems
JD Edwards Servant Keepers Lotus Notes MS Office/Works Adobe Photoshop/Illustrator
MS Project donor BASE IV SAS FileMaker Pro Blackbaud Financial Edge
MS Access IMPAC II / EPMIS Visio MS Publisher HR Systems / OLPPS / SAP

Professional Detail

Georgia Emergency Management Agency (GEMA)/Eagle Resource Group, Inc., 11/2013 to 05/2014

Role: Grants Administration Consultant (Providing staff augmentation support)

- The Georgia Emergency Management Agency is designated the State Administrative Agency (SAA) for Federal Emergency Management Agency (FEMA) and Homeland Security grants within Georgia. These federal grants constitute the largest portion of the Agency's budget underwriting 60% of agency operations. Additionally, Homeland Security grants are the largest source of funding for local jurisdiction and state agency security project funding.
- Administer the Agency's Emergency Management Performance Grant program and other grant-related issues
- Coordinate the development/fielding of an automated grants management system.
- Maintain active liaison with local jurisdictions, state agencies, and non-profit institutions throughout Georgia;
- Provide policy recommendations to the Director and senior executive level decision making bodies on Homeland Security grant management,
- Conduct monthly review/analysis of grant obligation/expenditure rates; and execute revenue draws from federal agencies and creates journal adjustments to allocate the revenue to the proper award.
- Acts as federal grant liaison to sub-grantee personnel and financial liaison to federal agencies in regard to grant issues.
- Prepare quarterly financial status reports (SF-PPR) and other required reports and ensures timely submission as required by grant terms.
- Coordinate with the agency finance staff in the processing of vendor invoices and reimbursement requests.
- Conduct desk audits of sub-grantees purchase orders and invoice payments for appropriateness of charges, sufficiency of funds, proper funding accounts and sub-object accuracy
- Act as federal grant representative to GEMA executive and program staff.
- Prepare grant budget applications (SF 424), budget narratives, assurances and certifications within deadlines specified by the granting agency.
- Determine availability of funding and certifies funding (federal and State match) availability prior to the obligation of funds.
- Encumber memorandums of agreement (MOA's) in PeopleSoft system upon approval of Fiscal Services Chief.
- Oversee all EMPG grant financial activity concerning encumbrances, expenditures, revenues and award balances
- Review all sub-awards to ensure compliance with grant requirements and federal regulations
- Provide sub-grantees with financial and program performance reports to ensure compliance with grant terms.
- Process grant execution rates by sub-grantees and sub grantee requests for reimbursement;
- Oversee the completion and submission of all grant related paperwork,
- Coordinate and conduct sub grantee field assistance visits and audits,
- Assist regional coordinators in all grant related matters;
- Assist in the release of grant program information to the media and general public
- Support the State Emergency Operations center when activated to include training, exercises or actual emergencies, accidents or incidents

- Maintain a grant spreadsheet for each federal award that reports expenditures, revenues and obligations.
- Reconcile grant spreadsheets with PeopleSoft on a monthly basis.

JCWilliams Ministries, LLC **02/12 to Present**

Role: Sr. Business Development Consultant

- Oversees the development, coordination and administration of all aspects of the JCW Enterprise & JC Williams Ministries, LLC business identity before it goes public, including developing project implementation team concepts & staffing, developing policies & procedures, role definitions, and job descriptions
- Providing subject matter expertise in a wide range of different core areas of business, which include marketing strategy development, brand development, brand marketing, writing business plan, marketing messages, editing press releases, and creating and managing start-up budgets.
- Oversees the planning, organizing, leading, and controlling of program activities.
- Overseeing general operations, administration, program operations, fund development, HR, business development, government compliance, oversee financials, audits and develop strategies to ensure the organization's objectives are met.
- Performs the responsibilities of a Program Manager on behalf of JCWilliams Ministries, LLC. Projects.
- Providing oversight and assist project managers responsible for individual projects that collectively comprise of JCWilliams Ministries, LLC.
- On an as needed basis, develops project documents including: project plans, project charters, data flow/process flow charts/relationship diagrams, communication matrix, risk assessments, work breakdown structures & timelines

CedarCrestone Inc. **05/11 to 02/12**

Role: Sr. Consultant – University of Texas, Functional Team

- Participated in Grants project team with representatives for 7 institutions in conversion to and implementation of PeopleSoft 9.1 Financials.
- Assisted with the discovery and configuration of Maintenance Management.
- Grants Management Team modules included Grants, Projects, Contracts, Billing, Receivables, and Commitment Control.
- Participated in planning and conducting Interactive Design and Prototyping (IDP) sessions.
- Planning included creating/reviewing presentations, training team members, completing deliverables.
- Configured test system and set up scenarios as identified in Interactive Design and Prototyping (IDP) sessions for 7 institutions.
- Independently research applications, policies, and guidance documents for grant management issues (pre-award, post-award, allowable costs, audits, etc.).
- Completed Discovery and Design phases including defining and testing initial configuration, and creating and reviewing Business Processes.
- Grants Management includes Sponsors, Proposals, Awards, Budgets & Checking, Processing F&A, Contracts, Billing, Collections and reporting.

Independent Consultant **11/10 to 04/11**

Role: Grants Management Specialist – International Branch

- Performing the full range of grant/cooperative agreement pre-award functions including pre-award planning with sponsoring program offices, reviewing & providing comments on draft funding opportunity announcements, reviewing grantee applications, participating in objective review panels, conducting budget discussions with grantees, preparing pre-award and award documents, and providing advice and assistance to CIO program official s and applicants on the grant/cooperative agreement award process.
- Performing grant/cooperative agreement post-award functions such as processing continuations, supplemental request, carryover requests, redirections, lifting restriction, administrative actions, ect. Monitor and review progress reports, financial status reports, and annual audits.
- Perfuming the full range of closeout functions for expired awards

- Independently research applications, policies, and guidance documents for grant management issues (pre-award, post-award, allowable costs, audits, etc).
- Providing advice/ assistance to officials and grantees on grant/cooperative agreement administrative issues.

Center for Disease Control (CDC) – Procurement and Grants Office – Acquisition & Assistance
06/09 to 09/10

Role: ARRA Grants Management Specialist

- Subject Matter Expert for ARRA – American Recovery and Reinvestment Act of 2009 Awards
- Responsible for overseeing the business and other non-programmatic aspects of grants and cooperative agreements.
- Responsible for evaluating grant applications, negotiating grants; providing consultations and technical assistance to grantees; and administering grants after award.
- Responsible for independently processing standard grants/agreement closeout and disposition
- Coordinated and managed a computerized tracking system.
- Disseminated grant and cooperative agreement requests for proposals,
- Reviewed and analyzed responses, and recommended acceptance by higher authority as appropriate.
- Reviewed applications and other agreement proposals for technical adequacy and compliance with applicable laws, regulations, and policy, examining draft documents and reviewing topics such as instrument, legal authority, signatory authority, and assurances and provisions.
- Provided advice and counsel to managers on a wide variety of grants, cooperative agreements, and other agreements, such as challenge cost-share agreements, collection agreements, cooperative agreements, grants, and memoranda of understanding.
- Answered questions from grantees regarding the terms and conditions of the grants as well as agency policies.

Georgia State DHR – Public Health – WIC Branch 09/07 to 12/08

Role: Lead Cost Containment - Project Administrator

- Served as the Georgia State administrator for the federal Vendor Cost Containment Initiative
- Analyzed existing or proposed systems, strategies, services, or other WIC related matters;
- Identified needs for improvement and the methods and resources to accomplish such improvements;
- Designed, implemented, and monitored performance evaluation and cost containment tracking system;
- Interpreted and applied policy to develop procedures for implementing the program and in making decisions on difficult and complex financial, auditing, accounting, data processing, and management problems associated with Vendor Cost Containment
- Provided authoritative policy interpretations on systems design and associated requirements, ensuing data analysis, cleansing, mapping, conversion, and supporting documentation.
- Evaluated and analyzes data collection and utilization methods and quality control.
- Responsible for overseeing the preparation of reports and ensured timely completion/submission of plans, updates, certifications and exemptions.
- Responsible for establishing the competitive pricing criteria for assessing vendor redemption status.
- Responsible for developing criteria for standard deviation and weighting averages for seven peer food groups and submit to the USDA for approval.
- Analyzed inconsistencies or problems in applications of basic policies and implementation of major programs for management appraisal, review, and improvement within units while developing major organizational proposals that involve extensive analysis prior to recommending significant changes in workforce distribution, positions, and/or functional responsibility
- Provided ongoing technical assistance & advice to develop/implement initiative improvement strategies.
- Project lead for management and implementation of the Inventory Auditing Project for WIC vendors.

- Participated in task forces, surveys, studies, and other investigations of areas of management operations to determine adequacy of present systems.
- Participating in several projects deemed necessary to assure effective implementation of strategies/procedures for cost containment, cost neutrality for payment of food vendors, vendor audits and statistical research.

UCSF Department of Orthopaedic Surgery **05/06 to 11/06**

Role: HR Manager/ Project Analyst IV

- Managed Residency Program's successful accreditation process.
- Handled various departmental projects including space planning and credentialing.
- Provided primary oversight for all personnel and human resource activities for academic faculty appointments, postdoctoral fellows, and staff employees totaling over 250 employees.
- Responsible for recruitment and hiring, academic advancement and staff career development.
- Managed medical staff privileges, VISAS and State licensing requirements,
- Responsible for worker's compensation & disability claims, annual performance evaluations and reports.
- Acted as liaison to the Department's Chair and MSO providing interpretation and advice on staffing policies and procedures.
- Prepared monthly benefit reports (e.g. vacation, sick leave, and benefits eligibility).
- Prepared annual salary and affirmative action/diversity reports.
- Collaborating with UCSF constituent to solve all human resource and personnel problems.

Borders Solutions Group **07/05 to 05/06**

Role: Lead Subject Matter Expert/Business Process Grants Consultant

- Implemented new systems, functionality, and business process reengineering.
- Provided expert consultative advice with expertise in accounting, research administration, proposal development, account fund profile, award negotiation, receipt, and set-up department codes.
- Responsible for analyzing business and regulatory requirements.
- Responsible for evaluating & translating financial regulatory requirements & policy guidance across multiple programs/projects and functional areas into systems specifications
- Provided "best practices" based on consultation with other academic institutions.
- Provided review and standardization of current operational procedures
- Responsible for project management GL journal processing & cost transfer reporting, status and projections, purchasing & accounts payable, regulatory compliance project, close-out, facilities - space management, system subcontractor monitoring, payroll/personnel functionality, and central campus units.
- Researched administration processes from initial proposal preparation through award receipt, set-up, and project management to closeout.
- Responsible for implementing automated streamlined technology tools.
- Mapped processes and defining requirements for the new system (PeopleSoft).
- Tested PeopleSoft application for desired functionality.
- Designed and delivered PeopleSoft training.

UCSF Department of Anesthesia **09/04 to 07/05**

Role: Financial Analyst II

- Maintained the financial integrity for the SFGH Division ($5M budget).
- Independently directs all accounting and purchasing activities
- Provided knowledge of institution's policies and procedures for the varied types of funds.
- Provided cost analysis and conducting Financial Systems and Business Office Procedures Training.
- Provided technical support during systems migration.

JUMP/PREP **07/00 to 07/05**

Role: Assistant Program Administrator/Analyst

- Managed teacher recruitment search and selection process
- Created job descriptions and provided the necessary program training

- Worked in a collaborative effort with The Institute for the Study of Community-Based Services at Edgewood Center for Children and Families.
- Facilitated fund development and evaluation.
- Responsible for program development and review
- Coordinated community programs with agencies, insuring compliance with contract financial provisions and program goals; insuring that fiscal & program goals comply with funding source contractual agreements.
- Developed budget estimates and justifications for funding requests
- Monitored expenditures to assure compliance with budget.
- Formulating policies and procedures to facilitate program development and implementation.
- Conceptualizing, developing and implementing standards.

On Lok Senior Health **03/03 to 09/03**

Role: Fillmore/Western Addition Marketing Outreach Manger

- Responsible for marketing/public relations management and project analysis
- Providing PR strategies including: presentations to groups of seniors and other community groups, press conferences, radio talk shows, newsletter production, meetings with service providers, church leaders, public officials, planned various events and developing marketing materials.
- Designed Resource Material

EDS at CSAA **06/99 to 12/99**

Role: Project Manager/Administrator

- Led and managed cross-functional teams and projects.
- Responsible for proposals, financial tracking and budgeting, high-level meeting planning, project and timeline management, coordinating team activities, maintaining status reports, communicating with team members, internal departments, faculty and vendors.
- Coordinated work plan, reviewed the details of the plan with team, identifying potential problems and determined solutions.
- Assigned projects and programmatic areas of responsibility with subordinate staff
- Prioritized workload to meet expectations
- Reviewed and evaluated work methods and procedures.
- Responsible for all payroll, personnel and human resource activities

Hazeltine Avenue School **03/97 to 06/99**

Role: Management Analyst II

- Collected, maintained and analyzed information required for enrollment projections and school site development.
- Compiled, analyzed and prepared data required for school facilities reporting and projects.
- Conducted statistical research and prepare applications and reports that included performance and progress reports for higher-level management.

Various Clients **03/97 to 06/99**

Role: Project Analyst

- bd Systems & Electricord
- Harris Trust of California
- Fox Sports Network - Auditor
- Church Administration
- DefCon II / Hughes Career Resource Ctrs
- DMX Music & JDOE Productions

UCLA Medical Center and University, Los Angeles, CA **1984 to 1997**

Role: Administrative Analyst

- Responsible for staff management, personnel actions/payroll processing, budget and financial administration, policy development, program development, and volunteer leadership.
- Interacted with corporate and customer management to determine project scope, planning needs, and reporting requirements for large and/or multiple projects.

Name: Dana D.

Role: Functional Consultant – Financials - Grants

- Responsible for project analysis and management.
- Coordinate the development of project plans, analyze progress and develop necessary plan alternatives.
- Interpreted and applied laws, regulations, policies and procedures pertaining to 132 Alumni groups.
- Responsible for the preparation of programmatic budgets and documentation approval.
- Conducted cost-benefit analysis of expenses to ensure efficient use of funds.

Contracts and Grants Administration – Research Service Analyst

- Acted as a University representative to sponsoring agencies;
- Advised on agency requirements & guidelines to assist faculty in the preparation & submission of proposals
- Reviewed, critiqued and submitted for approval proposals for research, training and public service projects.
- Composed complex research contracts and other related agreements.
- Assisted other contract and grant administrators.
- Negotiated complex awards and coordinated award documents.
- Resolved pre and post-award administrative problems related to sponsored projects.
- Provided post-award administrative support including expenditure approvals, accounting detail and reporting requirement information.
- Monitored for ability on contracts, submitted interim reports, and reviewed and approved closeout documents.

Education/Professional Training

- American Recovery and Reinvestment Act (ARRA) CDC/NGMA National Grants Management Association
  Recipient Reporting 1512, 1605 and 1606 Regs ARRA Program Officer Training
  HHS Recovery Audit
- Federal Grants Law /OMB Guidance CDC/NGMA National Grants Management Association
- Appropriations Law for Managers and Supervisors CDC
- Writing Funding Opportunity for Grants and Cooperative Agreements
- UC Berkeley Bachelor's Degree - Legal Studies in process
- UC Berkeley Extension Project Management
- Vista College Associate Degree - Liberal Arts
- UC Extension & In Service Training University Policies & Procedures
  Business Management/Administration Contracts & Grants Administration Business Writing
  Personnel/Payroll Policies & Procedures Health & Safety Management Space Management
- SkillPath & Franklin TimeQuest Seminars Business Survival Skills
  Time and Task Management Managing Multiple Projects, Objectives, & Deadlines
  Conflict Management Skills for Women How to Be a More Effective Group Communicator
- Southern California School of Ministry Church Administration/Crisis Intervention Counseling
- Kansas City Trade Tech. Business Administration
- Southern CA Regional Occupational Ctr. Retail Merchandising/Marketing

Name: David G.

Role: Technical Consultant – HCM

Overview

Accomplished PeopleSoft HCM/HRMS developer with more than 15 years of progressive experience.

Computer SKILLS

- Vast PeopleSoft HCM/HRMS development experience includes analyzing, designing, coding, testing, and implementing changes to North American Payroll, HR, Benefits Administration, Security and Time & Labor modules.
- Special expertise in payroll and benefits processes, with programming and support experience in PeopleSoft HCM/HRMS (versions 6.0 to 9.1), PeopleTools (versions 8.49 to 8.52)
- Tools: Oracle 11g, Microsoft SQL/Server 2000, Quest Stat.

Professional Detail

Winn-Dixie/BI-LO Holdings, Jacksonville, FL **10/2013-2/2014**

PeopleSoft Consultant

- Performed data clean-up tasks for 2014 Open Enrollment and made adjustments to interface files.
- Modified company's Retail Quarterly Bonus Program.
- Designed mass update/insert process for employee training courses.
- Technologies used: PeopleSoft HCM version 9.0, PeopleTools version 8.49, SQR, IBM DB2, Quest Stat.

Io Consulting **1/2013-7/2013**

PeopleSoft HCM Technical Consultant

While assigned to the California State University system:

- Created Campus Course Fee Waiver Self Service application for faculty and staff, with workflow approvals.
- While assigned to the University of California Irvine Medical Center,
- Installed HCM 9.1 Bundles 9 and 10. Retrofitted customizations.
- Integration of Healthcare Source pre-employment assessment survey results into PeopleSoft.
- Calculate an applicant's relevant work experience for job openings to which they applied to.
- Technologies used: PeopleSoft HCM version 9.1, PeopleTools version 8.52, SQR, Oracle 11g.

King County, Seattle WA **3/2008-7/2012**

Master Applications Developer

- Provided technical and functional support for PeopleSoft HCM, including Benefits, North American Payroll, Time & Labor, Position Management and Security.
- Acted as Technical Lead for the countywide PeopleSoft production system (2/2009-1/2012). Responsibilities included: assigning work requests to other technical team members according to skill level and functional expertise; verified that coding and documentation standards were followed.
- Worked on a team to develop a process for the county to be reimbursed by FEMA (Federal Emergency Management Administration) for money spent on natural disasters, as well as the ability to more accurately reflect costs associated with state and federal grants.
- As Security Administrator for county-wide access to PeopleSoft HCM, affecting 25,000 employees, responsibilities included: maintaining and developing new user roles and permissions as business needs changed and new functionality was implemented; assisted users with access issues. Created new dynamic role queries.
- Combined several queries into one process for calculating retroactive pay adjustments due to union contract changes, resulting in an estimated savings of 50 hours per contract change.
- Technologies used: PeopleSoft HCM versions 8.9/9.0, PeopleTools/PeopleCode version 8.49, SQR, Oracle 11g.

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Metaformers Inc., San Francisco, CA **8/2007-1/2008**

Consultant

While assigned to The School District of Palm Beach County Florida:

- Analyzed functional specifications to develop technical solutions and perform customizations of eBenefits for the District's first Open Enrollment using PeopleSoft, which included a special calculation for employees that are only paid 22 times per year.

Fred Hutchinson Cancer Research Center, Seattle, WA **1/2001-7/2007**

PeopleSoft Systems Analyst/Programmer V

Develop/maintain mission-critical PeopleSoft HRMS applications and modules.

- Support 3,000 employees by applying timely patches, fixes and tax updates to PeopleSoft HRMS. Assist Payroll, Benefits and HR users with troubleshooting, issue resolution and system enhancements.
- Participated on a team upgrading PeopleSoft HRMS version 7.0 to 8.0 and was the technical team lead for upgrade from version 8.0 to 8.9. Responsibilities included fit/gap analysis of existing custom SQR programs; modification of pages, menus and tables using PeopleTools, PeopleCode, and Application Designer; troubleshooting and debugging upgrade issues. Worked closely with project manager, business owner, and technical team to successfully upgrade the application (and collateral systems) on schedule and on budget without outside consultants.
- Played key role in implementing first Web-based Open Enrollment processing system. Included extensive testing, debugging and problem solving. As a result, reduced HR staff commitment from 60 days to two weeks.
- Technologies used: PeopleSoft HRMS versions 7.0/8.0/8.9, PeopleTools/PeopleCode versions 7.02/8.18/8.46, SQR, Microsoft SQL/Server 2000.

Washington Mutual Bank, Seattle, WA **6/1994-1/2001**

Senior Programmer/Analyst I

Set up and maintained interfaces between PeopleSoft Benefits module and legacy benefit system.

- Created, modified and maintained custom SQR programs. Upgraded custom SQRs (version 6.0 to 7.5). Worked on PeopleSoft teams with up to 50 IT staff, end-users and consultants.
- Supported 35,000 employees in 40 states. Assisted users in developing procedures for maintaining data integrity. Coordinated annual Open Enrollment processing.
- Analyzed and supported interfaces to and from Dun & Bradstreet Software (DBS) E Series HRMS package (formerly MSA), and legacy employee benefits system.
- Projects included full life cycle development of new benefits enrollment system, which converted paper-based enrollment to online procedure saving $50,000 annually in costs.
- Technologies used: PeopleSoft HRMS versions 6.0/7.5, PeopleTools/PeopleCode versions 6.0/7.52, SQR, DBS E Series HRMS, Information Expert, IBM 3090, MVS/OS, TSO/ISPF, Roscoe, VSAM, COBOL/COBOL II, CICS.

Education/Professional Training

- Associate in Applied Arts. Griffin Business College, Seattle, Washington. Major in Data Processing.
- Several PeopleSoft course including: PeopleTools, PeopleCode, Application Engine, Integration Tools, Time & Labor Rules, North American Payroll, Benefits Administration

Name: Jesús C.

Role: Technical Consultant – Campus Solutions

Overview

Jesús is a Principal Consultant with extensive Enterprise Solutions experience specifically in the Higher Education industry. He is adept with various PeopleSoft development tools including: Application Engine, Application Package, PeopleCode, Component Interface, Integration Broker, Web Services, XML Publisher, SQR, Crystal Reports and PS Query. In addition he is familiar with Oracle, DB2, and SQL Server Database management systems. Jesús has the ability to promote positive client relations by dealing with customers in a creative, patient and tactful manner. In addition, Jesús is bilingual; fluent in both English and Spanish.

Professional Summary

CLIENT	ROLE	PROJECT TYPE	DATE
Peralta Community Colleges District	Principal Consultant	Campus Solutions and HR 8.9 production support 9.0 upgrade	Mar 2012 - Present
University at Buffalo, SUNY	Senior Consultant	Campus Solutions 9.0 implementation	Nov 2009 – Feb 2011, Sep 2011 – Feb 2013
University of Northern Iowa	Senior Consultant	Campus Solutions 9.0 implementation	Sep 2011
University of Northern Arizona	Senior Consultant	Campus Solutions 8.9 implementation	May 2011 – Jul 2011
Ohio University	Senior Consultant	Campus Solutions 9.0 implementation	May 2008, Mar 2011 – Apr 2011
University of Texas at Tyler	Senior Consultant	Campus Solutions 9.0 implementation	May 2009 – Oct 2009
School of the Art Institute of Chicago	Senior Consultant	Campus Solutions 9.0 implementation	Mar 2009 – Apr 2009
Azusa Pacific University	Senior Consultant	Campus Solutions 9.0 implementation	Feb 2009
University of Texas System	Senior Consultant	Campus Solutions 9.0 implementation	Jul 2008 – Dec 2008
University of Texas at Dallas	Senior Consultant	Campus Solutions 9.0 implementation	Jun 2008
Bellevue University	Senior Consultant	Campus Solutions 9.0 implementation	Apr 2008
MiraCosta College	Senior Consultant	Student Admin 8.9 upgrade	Aug 2007 – Feb 2008
University of Wisconsin at La Crosse	Senior Consultant	Campus Solutions 9.0 implementation	Jun 2007 – Jul 2007
University of Houston System	Senior Consultant	Student Admin 8.9 implementation and upgrade	May 2006 – May 2007
University of Arkansas	Senior Consultant	Student Admin 8.0 implementation and 8.9 upgrade	Feb 2003 – Feb 2004, Feb 2006 – May 2006
University of Maryland University College	Senior Consultant	Student Admin 8.0 implementation	Aug 2004 – Feb 2006
Virginia Community College System	Senior Consultant	Student Admin 7.6 implementation	Mar 2004 – Aug 2004, Mar 2002 – Feb 2003
Butler University	Senior Consultant	Student Admin 7.6 implementation	Dec 2000 – Dec 2001
University of Saint Thomas	Senior Consultant	Student Admin 7.6 Post Prod Support	Oct 2000 – Nov 2000
University of New Orleans	Senior Consultant	Student Admin 7.6 implementation	Jan 2000 – Sep 2000

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CLIENT	ROLE	PROJECT TYPE	DATE
Gettysburg College	Senior Consultant	Student Admin 7.6 implementation	Jun 1999 – Sep 1999
Center for Information Systems	Senior Consultant	Student Admin 7.6 pre-implementation	Mar 1999 – May 1999
University of Texas at Arlington	Director, Student Information Services	Managing technology improvements	Mar 1997 – Feb 1999
University of Colorado Health Sciences Center	Assistant Director - Data Processing, Financial Aid	Managing data processing & assisting with implementations	May 1993 – Feb 1997
University of Colorado at Boulder	Assistant Director, Student Financial Aid	Managing data processing & assisting with implementations	Feb 1991 – Apr 1993
University of Idaho	Assistant Director/Coordinator of Data Processing, Financial Aid	Information Associates Student Information System Financial Aid module implementation	Jan 1989 – Jan 1991
Washington State University	Systems Manager, Financial Aid	Maintenance and support	Jan 1986 – Dec 1988

Professional Details

Peralta Community Colleges District

Project: Campus Solutions and HR 8.9 production support 9.0 upgrade
Role: Principal Consultant

- Providing project management, technical lead and development support for the Campus Solutions and HR 8.9 to 9.0 upgrade. Also providing support for critical fixes to existing customizations in their Campus Solutions and HR 8.9 environments.
- Primary upgrade tasks include assisting with project planning, allocation of staff resources and conducting knowledge transfer, coordinating test resources and carrying out testing with functional users, retrofitting some customizations, advising on system architecture design and technical infrastructure requirements as well as hardware and software acquisitions.

University at Buffalo, SUNY

Project: Campus Solutions 9.0 implementation
Role: Senior Consultant

- Provided technical implementation support for the development tasks for the Admissions, Academic Advising, Financial Aid, Student Records and Student Financials modules.
- During the initial implementation provided technical implementation support for the development tasks related to the go-live for the Admissions, Academic Advising, Financial Aid, Student Records and Student Financials modules. Development tasks included creating a bolt-on application for processing admissions decisions for transfer students, creating an interface for updating campus solutions with international students' admissions decisions, building equations for the Financial Aid awarding and the Student Financials tuition calculation processes, and creating additional interfaces to keep external systems in synch, among others. Also provided equation engine training and knowledge transfer, and overall support and knowledge transfer for the university's technical staff.

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University of Northern Iowa

Project: Campus Solutions 9.0 implementation

Role: Senior Consultant

- Provided technical support and assisted with the customization of the official transcript process for the Student Records Office.

University of Northern Arizona

Project: Campus Solutions 8.9 implementation

Role: Technical Consultant

- Provided technical support and developed PLUS Loan processing customizations for the Financial Aid Office.

Ohio University

Project: Campus Solutions 9.0 implementation

Role: Senior Consultant

- Provided technical support for the institution's technical staff and assisted them with the development of customizations, interfaces, and conversion efforts.
- Before that, developed technical estimates and specifications, as well as documentation for the Academic Structure and Campus Community, Admissions, Financial Aid, and Student Financials fit/gap sessions.

University of Texas at Tyler

Project: Campus Solutions 9.0 implementation

Role: Senior Consultant

- Provided technical support for the institution's technical staff and assisted them with the development of interfaces and customizations and equations for the PS 9.0 Campus Solutions implementation.

School of the Art Institute of Chicago

Project: Campus Solutions 9.0 implementation

Role: Senior Consultant

- Supported the need for Financial Aid award packaging at SAIC by writing and updating equations; by setting up and loading Merit Awards using the External File Load tool; by assisting in troubleshooting issues with their FA processes like FA Term Build and Budget Assign, etc. Continued assisting them with the use of Com Gen to generate award letters and other communications.

Azusa Pacific University

Project: Campus Solutions 9.0 implementation

Role: Senior Consultant

- Assisted in the conversion of over one million rows of data from Raiser's Edge to PeopleSoft using Application Engine, Application Packages, Component Interfaces, Excel-to-CI and other tools to convert the variety of file formats and data volumes. Also assisted in troubleshooting some issues they were having with Integration Broker messages.

University of Texas System

Project: Campus Solutions 9.0 implementation

Role: Senior Consultant

- Developed custom applications to support the implementation of three institutions in the University of Texas System. These custom applications will be used by UT Arlington, UT Dallas and UT Tyler. For Admission, developed an electronic application load process for the institutions to load the Apply Texas application files they receive from the state. For Financial Aid, developed an Application Engine program to populate the Expected Graduation field in the Student Records module to facilitate the accurate processing of Financial Aid awards Assisted other technical staff as needed so they will be able to complete their assigned tasks.

University of Texas at Dallas

Project: Campus Solutions 9.0 implementation

Role: Senior Consultant

- Provided training and technical support for the institution's technical staff and assisted them with the development of interfaces for their s implementation.

Bellevue University

Project: Campus Solutions 9.0 implementation

Role: Senior Consultant

- Provided technical guidance for the PS implementation. Assisted the institution with identifying conversion requirements, setting time lines and estimates for their conversion efforts and building data mapping templates.
- MiraCosta College (Student Admin 8.9 upgrade) – Provided technical guidance and support for MiraCosta's PS upgrade from version 8.0 to 8.9. Primary tasks included retrofitting and applying fixes to a series of Student Records modifications.

University of Wisconsin at La Crosse

Project: Campus Solutions 9.0 implementation

Role: Senior Consultant

- Scribed for the Academic Structure and Campus Community, Admissions, Financial Aid, and Student Financials fit/gap sessions. Assisted with researching issues, collaborated in the presentations as needed, and provided technical estimates and specifications, as well as documentation support.

University of Houston System

Project: Student Admin 8.9 implementation and upgrade

Role: Senior Consultant

Provided technical implementation support for the development tasks related to the go-live targets for the Admissions, Financial Aid and Student Records modules. This included the implementation effort for the University of Houston and the University of Houston Victoria campuses as well as the upgrade efforts from version 8.0 to 8.9 for the University of Houston Clear Lake campus.

University of Arkansas

Project: Student Admin 8.0 implementation and 8.9 upgrade

Role: Senior Consultant

- Provided overall technical support for all PS Campus Solutions (Student Administration) application modules for the implementation of their upgrade from version 8.0 to 8.9. Prior to that, provided lead technical implementation support for all development tasks related to the go-live targets for the Financial Aid module and assisted with technical support for the Admissions module. This client does not use the PS Human Resources or PS Financials applications which required interfacing with legacy systems while implementing some customizations. Provided training and performance monitoring for client technical staff. Partnered with client staff to do presentations at the HEUG conference.

University of Maryland University College

Project: Student Admin 8.0 implementation

Role: Senior Consultant

- Provided lead technical implementation support for all development tasks related to the go-live targets for the Financial Aid module. Provided extended post production support and training until the client had suitable staffing to assume support responsibilities. Provided training for client technical staff.

Virginia Community College System

Project: Student Admin 7.6 implementation

Role: Senior Consultant

- Assigned a series of short projects spanning a total of 12 months in duration, and later returned for additional short term support. Provided technical lead support both implementing new applications and in troubleshooting existing customizations for the Financial Aid and Student Financials modules. Analyzed and resolved various reported post-production and implementation issues and developed critical reports to support their management efforts.

Butler University

Project: Student Admin 7.6 implementation

Role: Senior Consultant

- Provided lead technical support for all development tasks related to go-live targets, upgrades and post production support of live business processes for the Financial Aid module. Assumed Financial Aid functional analyst responsibilities for the last four months of the project during which I provided setup, testing and training support for the student loan processing components of the Financial Aid module. Provided training for the new client technical staff.

University of Saint Thomas

Project: Student Admin 7.6 Post Prod Support

Role: Senior Consultant

- Provided technical and functional post production support for the Financial Aid module. The University was in critical need of assistance to clean up corrupted data tables, fix set-up tables, and to develop numerous management and daily production reports. Analyzed and resolved the reported post-production problems and recommended and assisted in the implementation of solutions to the problems.

University of New Orleans

Project: Student Admin 7.6 implementation

Role: Senior Consultant

- Provided both technical and functional implementation and post production support for the Financial Aid module which was being implemented as a standalone module with interfaces to other legacy systems. Analyzed and resolved reported post-production problems and recommended and assisted in the implementation of solutions to the problems. Trained client data processing staff in the setup, processing and management of Financial Aid components like Student Budgets, Student Aid Packaging, Loan Processing, Fund Management and Reporting. Trained client technical staff.

Gettysburg College

Project: Student Admin 7.6 implementation

- Assisted in the conversion of Admissions and Student Records data from AIMS extract files to PeopleSoft Student Administration application tables. Assisted in the coordination and documentation of the conversion plan. Wrote SQRs and modified panels and tables as needed.

Center for Information Systems

Project: Student Admin 7.6 pre-implementation

- Assisted in conversion prototyping of Student Records and Financial Aid legacy data. Assisted in defining data conversion requirements, building prototype mapping documents of PeopleSoft conversion data, and mapping legacy data fields to appropriate PeopleSoft Student Administration application tables and fields. Assisted in writing, updating and modifying documentation for the overall project deliverables, with a primary focus on documentation of the conversion plan and prototyping. This project was carried out using single user versions of software on our laptops since the client had not purchased the software yet. My company got hired for this demonstrative effort to assist the Center in coordination of the decision to purchase PeopleSoft Student Administration for the Washington State Community Colleges and Technical Schools System.

Additional Professional Experience

Previously, Jesus worked for over ten years in Higher Education, providing leadership, management, functional and technical support to the offices of Financial Aid, Admissions, Student Records, Bursars, and the overall Enrollment Management effort for the Universities listed below:

University of Texas at Arlington, Arlington, Texas

Role: Director, Student Information Services

Responsible for coordination and management of technology improvements to the student administration systems use by the enrollment services departments for recruiting, financial aid management, registration and other student services.

University of Colorado Health Sciences Center, Denver, Colorado

Role: Assistant Director

Data Processing, Financial Aid – Responsible for managing all data processing activities as well as implementation of new technology and programs for the Financial Aid office, including acquisition and maintenance of equipment and administration of databases and servers.

University of Colorado at Boulder, Boulder, Colorado

Role: Assistant Director, Student Financial Aid

Responsible for managing all data processing activities as well as assisting with the implementation of new technology and programs for the Financial Aid office.

University of Idaho, Moscow, Idaho

Role: Assistant Director/Coordinator of Data Processing, Financial Aid

New position created to be responsible for the implementation of the newly purchased Information Associates Student Information System Financial Aid module.

Washington State University, Pullman, Washington

Role: Systems Manager, Financial Aid

Responsible for maintenance and support to the Financial Aid Management System running on the mainframe as well as coordination of priorities and technical resources. Responsible for implementation of new PC based programs and development. Assist with student services and processing needs during crunch times. Participate in Recruitment trips coordinated by the Office of Admissions and Recruitment.

Education/Certifications/Training/Presentations

Education

- Washington State University, Pullman, Washington - Bachelor of Science in Physical Sciences

Certification

- PeopleSoft Certification
- PeopleSoft 8 Certified Consultant - Technology

Name: Karen B.

Role: Sr. PeopleSoft Functional Lead/Project Manager

Overview

Karen is a professional functional lead and project manager with more than 10 years of experience leading PeopleSoft HCM, Financials, and Campus Solutions implementations and upgrades. Karen has experience managing both functional and technical resources as well as large teams of IT personnel. Karen has been responsible for overseeing analysis and development relating to on-going support of current systems and for conversion to new systems. Karen has a specialty in the Security for all modules of PeopleSoft. She also has worked extensively with the intersection points and interfaces between the pillars (HR, Financials and Campus Solutions). Karen is a hands on PeopleSoft specialist who can bridge the gap between functional and technical needs as well as lead the set up and configuration of most HRMS, Financials and Campus Solutions modules. Karen began her PeopleSoft career with PeopleSoft Payroll and HRMS so she is specifically adept at the HRMS suite of products.

Professional Summary

CLIENT	ROLE	PROJECT TYPE	DATE
Univ. of Puget Sound	Functional & Project Lead	PeopleSoft 9.0 CS, 9.1 FIN/HCM Implementation	Oct/2011– Jan/2013
Wesleyan University	Functional Analyst	PeopleSoft 8.9-9.0 CS/HCM Upgrade	Aug/2011-Oct/2011
George Fox University	Functional Analyst	PeopleSoft HR/CS Split and HCM 9.1 Upgrade	Aug/2011-Oct/2011
Berkeley College	Project Functional Lead	PeopleSoft 9.0 CS/FIN Re-Implementation & Integration	Jan/2011-Aug/2011
George Fox University	Report Development	Query Training and Assistance	Jan/2011-Mar/2011
Berkeley College	Security and Reporting Lead	PeopleSoft 9.0 CS Upgrade	Sep/2010-Dec/2010
National Park Community College	Functional Lead & Project Manager	PeopleSoft 9.0 CS/FIN/HCM Implementation	Aug/2008-Aug/2010
George Fox University	Project Manager	PeopleSoft 9.0 CS/FIN/HCM Implementation	Feb/2008-Oct/2008
Anderson University	Project Manager	PeopleSoft 9.0 CS/FIN/HCM Implementation	Oct/2007-July/2008
Watkins Motor Lines	Functional Lead and Project Manager	2 PeopleSoft Upgrades	May/1985-Oct/2007

PeopleSoft Application Expertise

- Human Resources
- Financials
- General Ledger
- Recruiting
- Student Financials
- PeopleSoft Security
- Crystal Reports
- Base Benefits
- Commitment Control
- Campus Solutions
- Admissions
- Accounts Payable
- SQL/SQR
- BI Publisher
- Payroll
- Purchasing/ePro
- Campus Community
- Student Records
- PeopleTools
- Query
- UPK

Professional Summary

Client: University of Puget Sound

Project: PeopleSoft 9.0 Campus Solutions, 9.1 FIN and HCM Implementation

- Responsible for requirements gathering for new and existing functionality, process mapping and system configuration
- Provided process recommendations based on best practices

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- Facilitated and assisted with Time and Labor design and configuration coordinating with the HRMS/Payroll configuration including initial unit testing
- Coordinated IB messaging between databases focusing on shared elements between HCM and Campus Solutions split databases
- Coordinated Payroll General Ledger Interface requirements and activity between Financials and Payroll; messaging combo edits/combo codes, mapping expenses, publish GLI to Financials, monitor IB messages
- Assisted with conversion validation of Vendors, GL Balances, and Person Bio-Demo data utilizing various compare tools
- Assisted with testing and payroll parallel comparisons and results
- Troubleshot and researched issues during testing and payroll parallel, log Oracle service requests and provide solutions to the team
- Responsible for ensuring that the project is moving forward in a timely manner according to the preferred project plan by assessing the daily progress of the consultants
- Managed hours and travel to stay within proposed budgeted amounts
- Monitored and resolved impacts to project scope, risks and change management
- Responsible for communication of project progress to the Core Team in weekly status meetings as well as via the project plan
- Provided additional post go-live support for technical and functional areas including trouble-shooting, documentation and reporting
- Responsible for creating project plans for both technical and functional implementation for HCM 9.1, Financials 9.1 and Campus Solutions 9.0
- Coordinated documenting fit-gap for Financials, Hyperion, HRMS and Campus Solutions

Client: Wesleyan University

Project: PeopleSoft 8.9-9.0 CS/HCM Upgrade

- Documented changes between Campus Solutions version 8.9 to version 9.0
- Documented changes between HCM version 8.9 to versions 9.0 and 9.1
- Conducted individual sessions with each functional area to review their current requirements and identified new functionality and features they would use
- Delivered written assessment of upgrade impacts to each functional area and provided a recommendation of what functional assistance may be needed during upgrade

Client: George Fox University

Project: PeopleSoft HR/CS Split and HCM 9.1 Upgrade

- Developed and Provided client with documentation of splitting the Campus Solutions and HRMS databases and the syncing options
- Developed and provided client with additional plan for PeopleTools upgrade
- Documented decision points needed in regards to splitting the database (IB Sync messages, ownership of configuration, ownership of data)
- Created Project Plan for HRCS database split and Upgrade to HCM 9.1

Client: Berkeley College

Project: PeopleSoft 9.0 CS/FIN Re-Implementation & Integration

- Upgraded Financials 8.3 – 9.0 as re-implementation
- Responsible for creating project plan for functional and technical tasks required to upgrade and merge into existing 9.0 database
- Responsible for requirements gathering for new and existing functionality, functional specifications and system configuration
- Responsible for communication of project progress to the Core Team in weekly status meetings as well as via the project plan
- Provided support for technical and functional areas including trouble-shooting, conversion validation, documentation and reporting
- Configured and tested Student Financials communication to GL and Accounts Payable to include Student Refunds, Cashiering and General Ledger Interface functionality. Provided end-user training for added functionality

Client: George Fox University

Project: Query Training and Assistance

- Completed Report Assessment and Recommendation for Campus Solutions query development
- Wrote SQL Views to enhance query reporting needs
- Created priority queries and Crystal Reports
- Provided PS Query training and tips to end-users

Client: Berkeley College

Project: PeopleSoft 9.0 CS Upgrade

- PeopleSoft 9.0 Campus Solutions Upgrade
- Redesigned security configuration of permission lists and roles for Campus Community, Admissions, Student Records, Financial Aid, Student Financials
- Created SACR security
- Wrote SQL scripts to convert and assign new roles and SACR security to users
- Created Report inventory tracking list for PS Query and Crystal report development
- Managed report development tracking to ensure completion of development, testing and end-user sign-off
- Developed PS Queries and Crystal reports for Admissions
- Created SQL Views to enhance query reporting needs

Client: National Park Community College

Project: PeopleSoft 9.0 CS/FIN/HCM Implementation

- PeopleSoft 9.0 HRMS, Financials and Campus Solutions Implementation
- Designed, configured and tested Financials and HRMS security
- Created roles and permissions lists, configured and tested User Preferences and Commitment Control security
- Provided documentation and training for Security Administrator
- Documented Purchasing Workflow design and configured routing requirements. Create test scripts, scenarios and complete unit testing of workflow
- Created training documents and conducted end-user training sessions for Budgeting, Purchasing/Workflow Procedures and Query Development
- Developed critical college-wide reporting for budgeting, class schedule, enrollment counts and communications using Query, Crystal, and 3Cs
- Assisted with conversion validation for Campus Community, Student Records, Financial Aid and Student Financials by providing both ACCESS and EXCEL comparisons
- Responsible for creating project plans for both technical and functional implementation for HRMS, Financials and Campus Solutions
- Coordination of fit/gap efforts for Financials, HRMS and Campus Solutions
- Responsible for requirements gathering for new and existing functionality, functional specifications and system configuration
- Responsible for ensuring that the project is moving forward in a timely manner according to the preferred project plan by assessing the daily progress of the consultants
- Provide additional post go-live support for technical and functional areas including trouble-shooting, documentation and reporting
- Responsible for communication of project progress to the Core Team in weekly status meetings as well as via the project plan

Client: George Fox University

Project: PeopleSoft 9.0 CS/FIN/HCM Implementation

- PeopleSoft 9.0 Implementation of HRMS, Financials and Campus solutions
- Created project plans for both technical and functional implementation for HRMS and Financials
- Created fit/gap efforts for Financials, HRMS and Campus Solutions
- Gathered new and existing functionality, functional specifications and system configuration
- Provided support for technical and functional areas including trouble-shooting, conversion validation, documentation and reporting

- Ensured that the project moved forward in a timely manner according to the preferred project plan by assessing the daily progress of the consultants
- Communicated project progress to the Core Team in weekly status meetings as well as via the project plan

Client: Anderson University

Project: PeopleSoft 9.0 CS/FIN/HCM Implementation

- Project Manager for a PeopleSoft 9.0 Implementation of HRMS, Financials and Campus Solutions
- Created both technical and functional project plans
- Coordinated fit/gap efforts for Financials, HRMS and Campus Solutions. Including requirements gathering for new and existing functionality, functional specifications, system configuration
- Ensured that the project moved forward in a timely manner according to the preferred project plan by assessing the daily progress of the consultants
- Communicated project progress to the Core Team in weekly status meetings as well as via the project plan

Client: Watkins Motor Lines Inc.

Project: 2 PeopleSoft Upgrades

- Project Lead for two major PeopleSoft upgrades
- Responsible for creating project/ implementation plans as well as coordinating both functional and IT resources
- Responsible for arranging and programming team training
- Organized and monitored quality assurance test results
- Provided oversight for final implementation and post implementation tasks
- Assisted with administration of security within PeopleSoft including row-level security, security tree maintenance, object security, query security views, and portal administration
- Developed queries and crystal reports

Project: IT Director

- Team Lead for Information Technology group consisting of employees and contractors
- Group tasked with primary support of PeopleSoft HRMS, Payroll, and Benefits
- Payroll functional lead for initial conversion and implementation of PeopleSoft HRMS
- Developed queries and Crystal Reports
- Working knowledge of SQR and page/object development in Application Designer
- Responsible for coordinating functional and IT resources
- Responsible for arranging team training

Project: Time and Attendance

- Project Lead for implementation of a company wide Web-based time and attendance system
- Coordinated vendor installation personnel, functional payroll group, field operations, training department, and technical teams
- Key responsibility included ensuring all servers, connectivity, training documentation, and testing was complete
- Created and maintained project plan and implementation rollout schedule

Education/Certifications/Training/Presentations

- Tabor College- Hilsboro, KS
  Social Work 1975-1976
- Grace Bible College- Omaha, NE
  Psychology 1974-1975
- PeopleSoft: HCM, Payroll, Financials
- Technical Skills: Experience in NIKU (Project Management Tool) Mercury Quality Center, PeopleTools, SQR, SQL, CICS, COBOL, UNIX, Easytrieve, PeopleSoft Query

Name: John B.

Position: Functional HCM Consultant

Overview

John is a functional and technical professional and has over 15 years of PeopleSoft hands-on technical and functional consulting experience, with a total of more than 30 years in higher education environment. John has worked with Core Human Resources, Base Benefits, Payroll, Position Management, Commitment Accounting and Campus Community. Prior to consulting, he held the position of Public Service Administrator as payroll operations manager at a university and worked in the police department at the university.

Professional Summary

CLIENT	ROLE	PROJECT TYPE	DATE
University of Kansas	Functional Lead	HCM post-upgrade	2013
Portland Public Schools	Functional Lead	HCM Upgrade	2012
California State University – Multiple Campuses	Functional Lead	HCM Implementation	2012
University of Delaware	Functional Lead	HCM Upgrade	2011
Alabama State University	Functional/Technical Lead	HCM, CS Implementations	2011
Bellevue University	Technical Lead	CS Implementation	2010
Peralta Community College	Technical Lead	HCM, CS Implementation	2009
New Jersey City University	Functional/Technical Support	HCM, CS Implementation	2008
University of Houston	Functional/Technical Support	HCM, CS Implementation	2007
Bowling Green State University	Functional Lead	HCM Implementation	2006
University of North Texas	Functional Lead	HCM, CS Implementation	2005
Cornell University	Functional Lead	HCM Upgrade	2004
Clarkson University	Functional Support	HCM Implementation	2003
University of Maryland University College	HCM Analyst	HCM Implementation	2002
University of Houston	Functional Lead	HCM, CS Implementation	2001
University of Rhode Island	Trainer	HCM	2000
Houston Community College	Functional Lead	HCM Implementation	1999 – 2000
University of New Orleans	Functional Consultant	HCM Implementation	1999
Maricopa Community College	Functional Lead	HCM Implementation	1998

PeopleSoft Application Expertise

- Core Human Resources
- Position Management
- Application Designer
- PeopleTools
- Data Mover
- Base Benefits
- Commitment Accounting
- Application Engine
- SQL/SQR
- Security
- Payroll
- Campus Community
- PeopleCode
- Query
- Crystal Reports

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Name: John B.

Position: Functional HCM Consultant

Professional Summary

Client: University of Kansas

Project: Version 7.6 to 9.1 HCM Upgrade

- Functional HR/Payroll consultant for post-upgrade clean-up.
- Implemented Contract Pay functionality for academic-year faculty.
- Designed process for contract pre-paid deductions for summer benefits.
- Worked with technical team for budget load of position, job and department budget table.
- Provided post-upgrade implementation production support across HCM modules as needed.

Client: Portland Public School System

Project: Version 8.9 to 9.1 HCM Upgrade

- Functional lead for HCM 8.9 t 9.1 upgrade.
- Conducted training, design session modeling and testing for implementation of new 9.1 functionalities such as contract pay, new benefits rates tables, new garn rules, etc.
- Provided documentation for all new functionalities.

Client: University of California Systems

Project: Version 9.1 HCM Implementation

- Functional payroll and commitment accounting lead for HRMS 9.1 implementation.
- Conducted training, design session and conference room pilots for wave 1 of a three wave, system-wide implementation across multiple campuses.

University of Delaware

Project: Version 9.1 Upgrade and Commitment Accounting Implementation

- Functional and technical consultant for commitment accounting implementation as part of an 8.9 to 9.1 upgrade.
- Wrote application engine conversion scripts and production processes.
- Provided functional and technical support post-implementation.

Alabama State University

Project: Version 9.0 HCM and Campus Solutions

- Set up security for both CS and HR/payroll implementations.
- Provided functional and technical support for commitment accounting implementation.
- Provided post-production support for all HCM module.
- Modified the GL interface to meet client requirements.

Bellevue University

Project: Version 9.0 Campus Solutions

- Wrote conversion scripts for student records and contributor relations conversion.
- Wrote custom reports in SQR, Crystal and PSQuery.

Peralta Community College District

Project: Version 9.0 HCM and Campus Solutions

- HR technical lead for a position management and commitment accounting implementation.
- Wrote conversion programs to load position data and department budget table from existing HR and payroll data.
- Wrote custom processes and modified PeopleSoft reports and processes to fit client requirements.
- Worked on student records reports.

New Jersey City University

Project: Version 8.9 HCM and Campus Solutions

- Functional and technical support for upgrade to 8.9 and implementation of commitment accounting.
- Modified GL interface to meet client requirements.
- Assisted Student Financials in upgrading student refunds through payroll.

University of Houston System

Project: Version 8.9 HCM and Campus Solutions

- Functional and technical support for HR/base benefits/payroll/commitment accounting upgrade to 8.9.
- Wrote and retrofit student records and admissions reports.

Bowling Green State University

Project: Version 8.8 HCM

- Functional lead for 8.8 HR/base benefits/payroll/commitment accounting implementation.
- Modified the GL and AP interfaces to fit client requirements.
- Wrote custom SQR processes for commitment accounting.

University of North Texas

Project: Version 8.3 HCM and Campus Solutions

- Functional lead for 8.3 HR/base benefits/payroll/commitment accounting implementation.

Cornell University

Project: Version 7.5 HRMS upgrade to 8.0

- Conducted Fit/Gap sessions covering payroll processing and commitment accounting for an upgrade from version 7.5 to version 8.

Clarkson University

Project: Version 7.5 HRMS

- Conducted business process re-engineering study of the university's work study program, including payment of FWS students.
- Designed SQR process to interface payroll actuals for work study employees back to PeopleSoft financial aid.
- Provided functional support for commitment accounting implementation.

University of Maryland University College

Project: Version 7.5 HRMS

- Conducted pre-implementation analysis of the effort needed to implement payroll processing.

University of Houston System

Project: Version 7.6 HRMS/Student Administration

- Functional lead for 7.5 HR/base benefits/payroll/commitment accounting implementation.

University of Rhode Island

Project: Version 7.5 HRMS

- Prototyped, demonstrated, and trained client team in commitment accounting.

Houston Community College System

Project: Version 7.5 HRMS

- Functional lead for 7.5 HR/base benefits/payroll/commitment accounting implementation.

University of New Orleans

Project: Version 7.5 HRMS

- Part-time functional consultant for implementation of 7.5 payroll and commitment accounting.

Maricopa Community College District

Project: Version 7.5 HRMS

- Functional lead for 7.5 HR/base benefits/payroll/commitment accounting implementation.

Education/Certifications/Training/Presentations

Education

- BGS, Medieval History, University of Kansas
- Graduate study, Medieval and American History and Journalism, University of Kansas

Name: John B.

Position: Functional HCM Consultant

Certifications

- PeopleSoft: Human Resources, Base Benefits, Payroll, Advance Payroll, Benefits Administration,
- PeopleTools I & II, SQR, PeopleCode, Application Engine

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Name: Pam B.

Role: Functional Consultant- HCM

Overview

Pam is a PeopleSoft Functional HRMS specialist with over 17 years of PeopleSoft HRMS experience and over 11 years as a Benefits Manager. Pam has specialized in all areas of the PeopleSoft HCM product including Benefits and Benefits Administration Setup, Recruit Workforce, Talent Acquisition Manager/eRecruit, eApplications, Applicant Tracking, Payroll, Interface Specifications and Testing. Pam has extensive experience setting up employee leave plans and running the delivered accrual process. She also serves as a liaison between Functional subject matter experts and the technical team to develop customization of the leave process (back-end adjustments). Pam has assisted with multiple Human Capital Management (HCM) implementations and upgrades and served as the Benefits Administration Lead for one of the largest PeopleSoft implementations consisting of more than 125,000 employees.

Professional Summary

CLIENT	ROLE	PROJECT TYPE	DATE
Univ. of Puget Sound	HCM Functional Lead	PeopleSoft 9.0 CS, 9.1 FIN/HCM Implementation	July/2012-May/2013
Hospital of Central Connecticut	HCM Functional Lead	PeopleSoft 8.9 Ben Admin Implementation; 8.9-9.1 Benefits and Payroll Upgrade	Oct/2010-June/2012
City of Lakeland	HCM Functional Lead	PeopleSoft 8.9-9.1 HCM Upgrade	June/2011-Aug/2011
National Park Community College	HCM Functional Lead	PeopleSoft 9.0 HCM Implementation	Apr/2010-Jan/2011
Orange County Government	Functional Lead	PeopleSoft 9.0 HCM Upgrade	Mar/2009-June/2010
Anderson University	HCM Functional Lead	PeopleSoft 9.0 CS/FIN/HCM Implementation	Nov/2007-Feb/2009
Watkins Associated Industries	Functional Consultant	PeopleSoft Report and Interface development	Mar/2007-Oct/2007
Universal Studios	Functional Consultant	PeopleSoft Ben Admin and Customization Support	Sept/2006-Feb/2007
North Dakota University System	Functional Lead	PeopleSoft 8.3-8.9 HCM Upgrade	July/2006-Sept/2006
City of Clearwater	Functional Lead	PeopleSoft 8.3-8.9 HCM Upgrade	Dec/2005-Apr/2005

PeopleSoft Application Expertise

- Human Resources
- Payroll for North America
- Base Benefits
- Query
- Benefits Administration

Professional Summary

University of Puget Sound

Role: Lead HCM Functional Consultant

- Benefits/Payroll/Benefits Administration Lead for PeopleSoft 9.1 Implementation
- Led Fit/Gap Sessions and developed Gap documents
- Responsible for designing Benefits, Benefits Administration and Payroll Systems including ePay and eBenefits 9.0
- Configured the core tables for Base Benefits and Payroll Systems including changes to Text Catalog for on-line Benefit Enrollments
- Responsible for testing and troubleshooting all benefit plan enrollments

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- Responsible for directing the technical team for conversion
- Tested and validated conversion
- Responsible for unit and system testing
- Prepared Functional and Technical Specifications for System modifications
- Developed Procedure Documentation for Benefits, BenAdmin and Payroll Processes
- Responsible for defining and setting up Benefits Administration Tables
- Developed Queries for End-Users to be used in payroll processing, benefit administration processing, and benefit premium reconciliations
- Led team to identify process/customization for handling <12 month Employees for collecting benefit premiums while employee on short work breaks

Hospital of Central Connecticut

Role: Lead for Benefits Administration implementation of v8.9; 2012 Open Enrollment; eBenefits Implementation; and PeopleSoft Upgrade 8.9 to 9.1 (Benefits and Payroll)

- Reviewed current business processes for handling benefit enrollments
- Reviewed Prior Set up of Event Rules and Eligibility Rules to ensure they are appropriate and valid for business processes and in compliance with IRS guidelines
- Worked with the IT Staff/Benefits Staff to identify the frequency of tasks required to efficiently run the BenAdmin processes – will recommend steps for Event Maintenance and provide education for handling multiple events including OE
- Configured new Event Classes, Event and Eligibility Rules, Benefit Programs
- Worked with IT Team to develop customization where needed
- Developed Business Process and Processing Schedules (Daily and Weekly)
- Continued Daily Production Support as needed for Error Resolution, handling Out of Sequence Events and Flagged Participants
- Provided Production Support for Payroll Processing
- Provided instruction and process for bringing a small company into current PeopleSoft System
- Adding new Benefit Plans, Adding new eligibility rules
- Configured System in preparation for OE2012 (including new plans, new rates, etc)
- Configured system for eBenefits implementation, including modifications to Web TEXT, provided changes and MESSAGE_IDs for TEXT CATALOG changes
- Upgrade, Fit-Gap Analysis, Demo of 9.1 – new Benefit functionality, andIdentified current processes that can be retired
- Test modifications that have been retrofitted, Determined what new functionality will be used
- Developed Test Scripts
- Developed strategy for preparation of Unit, System and Parallel Testing

City of Lakeland

Role: Sr. Functional Consultant for PS upgrade 8.9 to 9.1

- Table Compares – PRD to Upgrade Environment
- Provided information on new functionality – Benefits and BenAdmin
- Meeting with Benefits Staff to discuss
- Discussion on current Vendor requirements and the impact of Relationship changes
- Discussion on Open Enrollment Processing – Contract with 3rd Party to handle OE Elections
- Provided best practice recommendation for preparing the Current Election and Benefit Option Data to 3rd Party using BenAdmin
- Provided recommendation for loading the Enrollment Data back into BAS_PARTIC tables
- Provided a Demo of FMLA Administration
- Department looking at 3rd party product
- Upper Management wanted to see if PS module would meet Business Need
- Reviewed Current BenAdmin setup and worked with SME to define the Event Rules to allow additional automation of enrollments
- Reviewed Customizations to identify those that can be retired because of new functionality and/or configuration changes

- o Test delivered functionality to ensure expected results are achieved
- Reviewed current Queries - identify and update queries that needed manual intervention to add new records/fields that are replacing records that are obsolete in 9.1
- Parallel testing

National Park Community College

Role: Project Lead HRMS Implementation

- HCM/Benefits/Payroll Lead for PeopleSoft 9.0 Implementation
- Led Fit/Gap Sessions and developed Gap documents
- Responsible for designing the HCM and Payroll System including Benefits, eProfile, ePay and eBenefits 9.0
- Configured the core tables for the HCM and Payroll Systems
- Responsible for testing and troubleshooting all benefit plan enrollments
- Responsible for directing the technical team for conversion
- Testing and validating conversion
- Responsible for unit and system testing
- Prepared Functional and Technical Specifications for System modifications
- Responsible for leading the client in running parallel payroll and open enrollment

Orange County Government

Role: Functional Lead

- Functional Lead engaged to complete the set up of the 457 savings plan and assist with the HCM upgrade including HR, Payroll and Benefits (including Benefits Administration)
- Upgrade to release 9.0
- Testing of new 9.0 functionality and recommendations on how to transition to utilization of this functionality
- Training on new 9.0 functionality for project team members and assistance with training production support staff
- Assistance with migration to production tasks and validation upon cut-over
- Open Enrollment for 2010
- Work to include the definition of specifications and testing to allow an automated load of benefit changes for CY2010 from a third-party system into PeopleSoft Open Enrollment tables
- Work to include the definition and testing of Open Enrollment using Benefits Administration set-up in PeopleSoft to meet the County's requirements for 2010

Anderson University

Role: HCM/Payroll Lead for PeopleSoft 9.0 Implementation

- Led Fit/Gap Sessions and developed Gap documents
- Responsible for designing the HCM, Benefits and Payroll System including eProfile, ePay and eBenefits 9.0
- Configured the core tables for the HCM, Benefits and Payroll Systems
- Responsible for testing and troubleshooting all benefit plan enrollments
- Responsible for directing the technical team for conversion
- Tested and validated conversion
- Responsible for unit and system testing
- Prepared Functional and Technical Specifications for System modifications
- Responsible for leading the client in running parallel payroll and open enrollment

Watkins Associated Industries
Date: Mar 2007 – Oct 2007

Role: Functional Consultant

- Developed procedures for adding/tracking additional benefit information needed for COBRA processing
- Developed reports for FSA Contributions and Workers' Compensation
- Developed multiple interfaces for Health Provider and other 3rd party vendors

Name: Pam B.

Role: Functional Consultant- HCM

Universal Studios

Date: Sep 2006 – Feb 2007

Role: Functional Consultant

- Streamlined current business processes in Benefits Administration
- Spearheaded open enrollment and configured system for new plan year values
- Provided production support for a functional team of 6 employees
- Served as liaison with Universal California's 3rd party to expedite customizations

North Dakota University System

Date: July 2006 – Sept 2006

Role: Functional Consultant

- Functional HCM 8.3 to 8.9 upgrade resource
- Provided remote functional support for upgrade and answer trouble tickets for current production environment
- "Go to" resource for 8.9 Talent Acquisition Manager Implementation

City of Clearwater

Date: Dec 2005 – April 2005

Role: Functional Lead

- Assisted with HCM 8.3 to 8.9 upgrade
- Developed HR and Payroll 8.9 Navigation Documents
- Developed Training Documentation to provide the users at the City with a smooth transition to the new HRMS 8.9 version
- Delivered training to End Users

United Methodist Publishing

Date: Oct 2005 – Nov 2005

Role: Functional Lead

- Functional Lead for Fit Gap Analysis for Recruiting from 8.3 to 8.9
- Prepared As Is documentation
- Prepared Future State Recommendations
- Prepared documentation outlining the functionality that is not being utilized and recommendations on how to rectify current challenges

City of Lakeland

Date: Aug 2005 – Oct 2005

Role: Functional Consultant

- Functional resource for Upgrade of HCM/Payroll from 8.3 to 8.9
- Performed HCM functional fit/gap
- Responsible for HCM/Benefits setup, design and testing
- In security, she assisted with role and permission definitions and set up
- Query security set up as well as query analysis and design
- Provided necessary support to update delivered City of Lakeland PeopleSoft queries/crystal reports
- Responsible for conversion validation

Florida A&M University

Date: Feb 2004 – Aug 2004

Role: Functional Lead

- Developed training curriculum for HCM (v 8.8) including Ben Admin and eBenefits
- Actively participated in the HCM fit/gap sessions ensuring proper analysis of vanilla PeopleSoft when deciding on modifications to the system.
- Assisted in HCM strategic planning sessions
- Participated and contributed HCM analysis expertise to user group meetings
- Developed Procedure Manuals for HCM Core Table Setup
- Managed End-User Training Initiative
- Developed Strategic Training Plans for entire implementation of HCM

Name: Pam B.

Role: Functional Consultant- HCM

- Delivered Introduction to PeopleSoft 8.8 Navigation Training Classes
- Developed ERP Training Team Power Point Presentations

City of Clearwater

Date: Nov 2003 – Feb 2003

Role: Functional Lead

- Responsible for implementation of Recruit Workforce version 8.3.
- Developed End-User Procedure Manual for Administering Recruit Workforce
- Worked with the technical team to develop custom reports and letters

New Jersey Highway Authority and Southwest Bank of Texas

Date: July 2003 – Nov 2003

Role: Functional Lead

- Responsible for trouble-shooting current set up of Leave Plans, Vacation Buy Plans and the Leave Accrual Process for Southwest Bank of Texas version 8.8
- Developed testing scenarios and prepared documents for technical assistance in converting appropriate plan enrollments and leave accrual balances
- Identified necessary changes and implemented them for leave accruals to work according to the clients' specifications
- Developed End-User Training Materials for NJHA for PeopleSoft HRMS upgrade from 7.5 to 8.3

Scholastic Bookfairs

Date: May 2003 – July 2003

Role: Functional Consultant

- Developed and delivered End-User training for PeopleSoft HRMS 8.X for Scholastic Book Fairs including HR, Benefits, Recruit Workforce, Applicant Tracking, Maintaining Payroll Data and Query.
- Developed additional data entry aids for quick reference for job and benefits new hires and changes

Darden Restaurants

Date: Dec 2000 – April 2003

Role: Functional Lead

- HCM/Benefits Administration Functional Lead for a version 8.X implementation with over 125,000 employees
- Responsible for defining and setting up Benefits Administration Tables
- Responsible for developing and administering in-house and end-user training
- Implemented Cobra and Benefits Billing
- Responsible for testing and troubleshooting all benefit plan enrollments
- Responsible for running Benefits Administration during all three phases of the project, including "Go Live' and post implementation support
- Prepared Functional and Technical Specifications for System modifications
- Developed queries for end-users
- Coordinated and ran a successful Open Enrollment Process with over 125,000 employees

Breed Technologies

Date: Apr 2000 – Nov 2000

Role: Functional Lead

- Responsible for completely redesigning the current benefit set-up and Implementing Cobra and Benefits Administration
- Developed and executed multiple Mass Change Definitions
- Responsible for developing multiple crystal reports and bringing three outlying business units onto PeopleSoft
- Developed and trained users on Managing Labor Relations and Administering FMLA as well as developing end user Procedure Manuals for Human Resources/Benefits Administration.
- Lead resource for system/table cleanup project including job code definitions, organization of department tree, and overall employee data
- Lead resource for testing and validation during upgrade process

Watkins Motor Lines

Date: Oct 1999 – Mar 2000

Role: Functional Consultant

- Coordinated multiple third party interfaces between MIS Department and Functional Department including validating and executing output data.
- Developed Payroll Department's remittance relating to ALL benefit plans for payment and documentation of vendor costs and fees.

Name: Pam B.

Role: Functional Consultant- HCM

- Coordinated the Implementation and testing of Cobra Administration as well as developing a year-end document for payroll outlining steps and procedures

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Orange County Government

Date: Mar 1999 – Oct 1999

Role: Project Lead

- Functional Upgrade Project Lead responsible for Panel comparison and documentation of changes between PeopleSoft HR, Benefits Administration and Payroll "vanilla" 6.02 and 7.5.
- Responsible for running the payroll process from creating pay sheets to confirmation. Also responsible for troubleshooting payroll error messages and validating special accumulator balances.
- Evaluated/Compared the differences between client's 6.02 customizations and the new 7.5 functionality
- Responsible for Tested and Validation of upgrade in Payroll, Benefits, and HR
- Developed and administer training for end-users on client's customized 7.5 database, including training on paycheck data, paycheck summary, and benefits summary
- Provided production support including queries, excel customizations and production troubleshooting

American Automotive Association (AAA)

Date: Sep 1998 – Feb 1999

Role: Functional Lead

- Served as Benefits Functional Lead for PeopleSoft open enrollment and benefits reconciliation, including data clean up and troubleshooting of Benefits problems.
- Designed PeopleSoft HR and Benefits training materials and conducted on site training to train the client's new HRIS manager and other support staff
- Validated and implemented custom benefits data feeds from PeopleSoft to outside vendors for their upgraded PeopleSoft 7.02 system
- Provided detailed project planning support and assistance in resource allocation
- Developed employee procedures manual for Human Resources. This manual helped to organize several manual systems and develop clear guidelines for the employees to follow explaining all aspects of their HR policies and how they are implemented within their PeopleSoft system.

Florida Tile Industries

Date: Sept 1987 – Sept 1998

- Employee Benefits Manager for 1500 employees
- Senior team member for Implementation of PeopleSoft Human Resources, Base Benefits and Payroll version 4. Provided functional expertise in Benefits design, setup, testing and 'Go-Live' resulting in a very successful 7-month implementation.
- Active functional participant for PeopleSoft system upgrade version 4.02 to 6.01. Provided all QA and testing for upgrade for Benefits area and all Benefits interfaces
- Implemented Benefits Administration version 6
- Designed, Set-up and tested PeopleSoft Benefits Administration using version 6.01 with minimal technical support or assistance. Performed all data validation and data analysis related to implementation and troubleshooting.
- Provided detailed technical specifications and testing for Benefits Data Warehouse Implementation between PeopleSoft HRMS system and Parent Company system. Designed, tested and maintained all other benefits interfaces including 401(k) feed, Health Benefit feed, Dental and Vision feed.
- Developed and implemented Retirement Savings Plans and employee communication to include profit sharing & 401(k), resulting in increased employee participation of 92%.
- Designed and Implemented Flexible Benefit Program with an emphasis on Managed Care resulting in increased quality of services to employees and cost reduction of 5% for the company in the first year and an anticipated 15% in the second year.
- Administered complex defined Benefit Plan with a savings of over $200,000.00 in cost of terminating the current plan.

Name: Pam B.

Role: Functional Consultant- HCM

- Cost effective administration of group insurance plans for 1500 employees in 33 locations and 15 states assuring consistent application of state legislation and regulations governing health plans. Includes establishing policy and procedures for claim administration and compliance with ERISA.
- Prepared and administered legally required data and reports

Education

Florida Metropolitan University- Summa cum Laude – Valedictorian - BBA
Wharton School, University of Pennsylvania - CEBS
Institute for Applied Management & Law - Certificate in Employee Benefits Law

Name: Tracey G.

Role: Technical Consultant – Portal

Overview

Over 10 years of experience with development, implementations, and upgrades of PeopleSoft applications. Consulting support includes troubleshooting, development, customizations, integration, interfaces, monitoring and performance tuning, role based security, quality assurance, and application technical support. Tracey is a proven consultant with a wide range of experience in demanding environments and industries.

Professional Summary

CLIENT	ROLE	PROJECT TYPE	DATE
City Colleges of Chicago	Technical Lead	Implementation of PeopleSoft Interaction Hub 9.1	11/2013 – Present
Northern Arizona University	Sr. Technical Consultant	Integrate PeopleSoft Interaction Hub 9.1 with Campus Solutions	10/2013 – 11/2013
Tufts University	PeopleSoft Sr. Principal Consultant	Implement/Integrate Interactive Hub	4/2012 – 9/2013
Genuine Parts Company	PeopleSoft Security Lead	Implement Dynamic Security	8/2012 – 1/2013
Ingersol-Rand	PeopleSoft Security Lead	New Implementation of PeopleSoft Security	4/2011 – 2/2012
Corning, Inc	PeopleSoft Portal Lead	Implement Portal 9.1 and Security	4/2011 – 10/2011
University of Colorado	Sr. Technical Consultant	Implement/Integrate Portal 9.1 with HCM 9.0	3/2011 – 6/2011
Grant MacEwan University	PeopleSoft Portal/Security/Workflow Lead	Implement/Integrate portal with HCM/FINS/EPM/CS	1/2010 – 4/2011
Credit Suisse	PeopleSoft Portal Lead	Integrate Portal with CRM and HCM	2/2008 – 12/2009
Ocean Bank	Portal Lead/Technical Lead	Implement Portal 8.9	9/2007 – 2/2008
John C. Lincoln Hospital	PeopleSoft Technical Lead	Upgrade Client form 7.5 to 8.8 to 8.9	1/2007 – 9/2007
Lockheed Martin	PeopleSoft Technical Consultant	Feasibility Study for 8.0 to 8.9 upgrade	6/2006 – 2/2007
University of Texas	PeopleSoft Developer/Administrator	Upgrade PeopleSoft from 8.8 to 8.9	4/2005 – 10/2006
Waste Management, Inc	PeopleSoft Portal Lead	Upgrade Enterprise Portal from 8.4 to 8.8	11/2003 – 4/2005

Professional Summary

Client: City Colleges of Chicago

Project: Implement PeopleSoft interaction Hub 9.1/Integrate with Campus Solutions/HCM 9.0

- Performed security design for CS.

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Name: Tracey G.

Role: Technical Consultant – Portal

- Performed portal design (User Experience or "Look and Feel").
- Create custom XSLT.
- Create custom Portal Templates
- Create pagelets
- Define Work Centers.
- Design Activity Guides/Guided Processes
- Design Related Content
- Developed roles and permission list.
- Developed complex role queries.
- Dynamic assignment of security.
- Develop Security tree.
- Designed row level security for Academic Structure.
- Integration Broker specialist.
- Troubleshoot integration, security, and portal issues.
- Non Federated Portal integration with Campus Solutions.
- PeopleCode development.
- Develop custom Integration Broker Service Operations.
- Integration with 3rd party applications such as BlackBoard, GradesFirst, Akademos, etc.
- Knowledge transfer

Client: Northern Arizona University

Project: Integrate Interaction Hub 9.1 with Campus Solutions, HCM and Finance

- Developed scope for integrated PeopleSoft Interaction Hub 9.1 with Campus Solutions (Student) 9.0, HCM, and Finance.
- Performed fit-gap sessions
- Demonstrated enhanced features with 8.53 PeopleTools.
- Define Work Centers.
- Design Activity Guides/Guided Processes
- Design Related Content
- Create scope document.
- Create project plan.

Client: Tufts University

Project: Implement/Integrate PeopleSoft Interactive Hub 9.1

- Performed security design for CS.
- Performed portal design (Look and Feel).
- Create custom XSLT.
- Create pagelets
- Technical Security Lead
- Developed roles and permission list.
- Developed complex role queries.
- Dynamic assignment of security.
- Develop Security tree.
- Designed row level security for Academic Structure.
- Troubleshoot integration, security, and portal issues.
- Non Federated Portal integration with Campus Solutions.
- Integration Broker specialist.
- PeopleCode development.
- Develop custom Integration Broker Service Operations.
- Integration Broker specialist.

Name: Tracey G.

Role: Technical Consultant – Portal

Client: Genuine Parts Company

Project: Implement Dynamic Security

- Security Lead
- Fit-Gap analysis
- Security design
- Security Documentation
- Department Security Tree design
- Implement Chartfield Security
- Implement Business Unit Security
- Custom Roles and Permission list
- Design and build complex role queries
- Security PeopleCode Development
- PeopleCode development
- Custom reports
- Integration Broker specialist

Client: Ingersol-Rand

Project: New Implementation of PeopleSoft Security

- Security Lead
- Fit-Gap analysis
- Security design
- Department Security Tree design
- Implement Security by Permission Lists
- Implement Security by Department Tree
- Custom Roles and Permission list
- Design and build complex role queries
- PeopleCode development
- Custom reports
- Integration Broker specialist

Client: Corning, Inc

Project: Implement Enterprise Portal and Dynamic Security

- Perform Portal design
- Perform Branding and "Look and Feel" configuration
- PeopleCode development
- Create customized pagelets

Client: University of Colorado

Project: Implement Portal 9.1/Integrate with HCM 9.0

- Perform Portal design
- Perform Branding and "Look and Feel" configuration
- PeopleCode development
- Create customized pagelets.

Client: Grant Mac Ewan University

Project: Implement/Integrate Portal with HCM/FINS/EPM/CS

- Performed security design for HCM, FDM, EPM, and CS.
- Performed portal design.
- Technical Security Lead
- Developed roles and permission list.
- Developed complex role queries.

- Dynamic assignment of security.
- Develop Security tree.
- Designed row level security.
- Integration Broker specialist.
- Design Workflow.
- Troubleshoot integration, security, and workflow issues.
- Non Federated Portal integration with EPM, Campus Solutions, FDM, and HCM.
- PeopleCode development.
- Workflow for eProcurement, Travel and Expenses, and HR.
- Develop custom Integration Broker Service Operations.
- Integration Broker specialist.
- Time and Labor Security
- Time and Labor Dynamic Groups

Client: Credit Suisse

Project: Integrate Enterprise Portal with CRM 9.0 and HCN 9.0

- Installed multi-language PeopleSoft Enterprise Portal 9.0
- Performed portal design
- Technical Lead
- PeopleSoft Pagelet development
- Portal 9 Branding
- Enterprise Portal "Look and Feel": Header, Footer, Multi-Language, page, Stylesheet development
- HRMS application integration with Enterprise Portal (Non-Federated)
- Single Signon and Active Directory integration. Public Key Infrastructure (PKI)
- Web Libraries and Signon Peoplecode development
- Application Package Development
- Search Index development
- Web Service integration
- Java Pagelet development
- Content Management administrator
- Implemented PeopleSoft Portal Packs for HRMS and CRM
- Configured Integration Broker for synchronization of roles, user profiles, Resource Finder information, and custom messages
- Weblogic web server 8.x administration
- On going technical support
- Ongoing technical support for portal and applications
- Design and implement security, permission lists and roles.
- Dynamic role PeopleCode
- Application Engine Development
- Performance monitoring and tuning

Client: Ocean Bank

Project: Implementation of Enterprise Portal 8.9

- Installed multi-language PeopleSoft Enterprise Portal 8.9
- Performed portal design
- Technical Lead
- PeopleSoft Pagelet development ,Content Management, Portal 8.9 Branding, and Enterprise Portal "Look and Feel.
- Create separate portal registries for core users and self-service employees.

- HRMS application integration with Enterprise Portal (Non-Federated)
- Single Signon and Active Directory integration. PeopleSoft Directory Interface(PDI)
- Implemented PeopleSoft Portal Packs for HRMS.
- Configured Integration Broker for synchronization of roles, user profiles, and Resource Management information
- Weblogic web server 8.x administration
- On going technical support
- REN Server Administration
- PeopleSoft PeopleTools upgrades
- PeopleSoft patches and bundles via Change Assistant
- Ongoing technical support for portal and applications
- Design and implement security, permission lists and roles.
- Performance monitoring and tuning
- Create environments in Windows 2003.

Client: John C. Lincoln Hospital

Project: Upgrade PeopleSoft from 7.5 to 8.8 to 8.9

- Upgrade copy of production database from 7.5 to 8.8 then to 8.9.
- Create Demo and Test environments.
- Review compare reports for customizations
- Reapply customizations
- REN Server administration
- Assess upgrade risks and benefits.
- Create custom SQRs, Component Interfaces, Application Engine, and Integration Broker Messages.
- PeopleCode
- PeopleSoft Directory Interface setup.
- Design and implement security, permission lists and roles.
- Data conversion.
- On going technical support for PeopleSoft applications
- PeopleSoft Administration
- Resolve issues with data conversion
- Troubleshooting
- Application of bundles via Change Assistant.
- Oracle Database Administration
- Performance tuning
- Upgrade to Oracle 10g 64bit.
- Backup and recovery.
- Integration specialist.

Client: Lockheed Martin

Project: Feasibility Study for PeopleSoft 8.0 to 8.9 upgrade

- Upgrade copy of production database from 8.0 SP2 to 8.9.
- Create Demo environments.
- Review compare reports for customizations
- Reapply customizations
- Assess upgrade risks and benefits.
- Create custom SQRs, Component Interfaces, and Integration Broker Messages.
- PeopleSoft Directory Interface setup.
- Design and implement security, permission lists and roles.

- Assist in conversion of data into PeopleSoft 8.9.
- On going technical support for PeopleSoft applications
- PeopleSoft Administration
- Application of bundles via Change Assistant.

Client: University of Texas

Project: Upgrade PeopleSoft from 8.8 to 8.9

- Create custom SQRs, Component Interfaces, and Integration Broker Messages for Benefits, Payroll, Grants, and Accounts Payables Modules.
- PeopleSoft Directory Interface setup.
- Design and implement security, permission lists and roles.
- Assist in conversion of legacy data to PeopleSoft.
- On going technical support for PeopleSoft applications
- PeopleSoft Administration
- Provide fit-gap analysis for Time and Labor and Talent Acquisition.
- Application of bundles via Change Assistant.
- PeopleSoft upgrade from 8.8 to 8.9
- Integration of HCM with FIN through Integration Broker.
- Integration specialist.
- Build PeopleSoft environments in AIX and Windows Server 2003

Client: Waste Management, Inc

Project: Upgrade Enterprise Portal from 8.4 to 8.8

- Installed multi-language PeopleSoft Enterprise Portal 8.8
- Performed portal design
- Technical Lead
- PeopleSoft Pagelet development ,Content Management, Portal 8.8 Branding, and Enterprise Portal "Look and Feel.
- SCM, FDM, and HRMS application integration with Enterprise Portal (Non-Federated)
- Single Signon and Active Directory integration. PeopleSoft Directory Interface(PDI)
- Implemented PeopleSoft Portal Packs for HRMS and SCM.
- Configured Integration Broker for synchronization of roles, user profiles, and GL information
- Weblogic web server 6.x – 8.x administration
- On going technical support
- PeopleSoft PeopleTools upgrades
- PeopleSoft patches and bundles via Change Assistant
- Ongoing technical support for portal and applications
- Create Permission Lists and Roles
- Performance monitoring and tuning
- Create environments in Windows 2000 and Linux

Education/Certifications/Training/Presentations

Education

- Bachelors of Science, Chemistry DePaul University

Certifications

- PeopleSoft Certified Technical Consultant, Version 8 (2001)
- Six Sigma Training
- MS SQL Server 7 Administration Certification
- MS SQL Server 7 Programming Certification

Name: Tracey G.

Role: Technical Consultant – Portal

- Oracle 8i Administration Certification
- Novell CNA
- MS Office, Lotus Notes, Visual Basic, SAP R/3, Oracle, MS SQL, Novell Netware, Intel Landesk, BMC Patrol Management, OS/2, EMC, Unisys ES7000 admin,Crystal Reports, and MS 95, 98, NT, and 2000, Intel, HP9000, Mandrake Linux administration 8.x-9.x, Openldap administration.
- UOP "Role Model Employee" Nominated 1995 and 1997. Awarded Role Model in 1997

Name: Tina S.

Role: Functional Consultant – Campus Solutions

Overview

Tina has more than 16 years of higher education experience and more than 12 years of information technology and management experience. She is experienced in PeopleSoft Campus Solutions application. Has been involved in all aspects of the project lifecycle including configuration, testing, development, end-user training, and production support. Tina is accomplished and goal-orientated She has excellent troubleshooting and functional support abilities. Tina has led the PeopleSoft 9.0 Student Records and Academic Advising Implementation and Support Team for University of Texas Southwestern Medical Center. In addition, Tina has held various management roles in the higher education industry including senior information resource manager, senior consultant, assistant registrar, student records trainer, and advisor

Professional Summary

CLIENT	ROLE	PROJECT TYPE	Date
University of Texas Southwestern Medical Center	Senior Information Resource Manager	PeopleSoft Campus Solutions Implementation	3/2010-Present
University of Massachusetts	Functional Lead	PeopleSoft Campus Solutions Upgrade	3/2009-3/2010
Coppin State University	Functional Lead	PeopleSoft Academic Advising Production Support	5/2008-10/2008
Bowie State University	Functional Lead	PeopleSoft 8.0-9.0 Student Records and Academic Advising Upgrade	1/2008-2/2009
Frostburg State University	Functional Lead	PeopleSoft 8.0-9.0 Student Records and Academic Advising Upgrade	1/2008-8/2008
University of Maryland-Eastern Shore	Functional Lead	PeopleSoft 8.0-9.0 Student Records and Academic Advising Upgrade	12/2007-6/2008
Polytechnic University	Functional Lead	PeopleSoft 7.6-9.0 Student Records Upgrade	10/2007-5/2008
University of Central Florida	Assistant University Registrar	PeopleSoft Student Records 8.0-8.9 Upgrade	8/2005-10/2007

Technical Expertise

PeopleSoft:

- 7.6 – 9.0
- Application Designer
- Security
- Query

Oracle:

- SQL Developer
- Student System
- UPK
- XML Publisher

Microsoft:

- Windows
- Word
- Access
- Excel
- Outlook
- PowerPoint
- Project
- Publisher

Other:

- Degree Navigator
- Transfer Navigator
- PageMaker
- Fireworks
- Internet and html
- GroupWise
- Visual Editor
- STAT
- Claris Home Page
- Dreamweaver
- Visio Professional
- Adobe Acrobat
- Adobe Photo Deluxe
- Query Builder
- FoxPro

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- Apple Macintosh

Professional Details

University of Texas Southwestern Medical Center – Dallas, TX

Role: Senior Information Resource Manager

- Manages the support team for PeopleSoft Campus Solutions and manages the implementation of new functionalities and initiatives for PeopleSoft Campus Solutions.
- Managed the project and team to implement the PeopleSoft Campus Solutions suite of applications.
- Oversee the functional team responsible for finalizing requirements, designing modifications, interfaces and reports, configuring and testing the application.
- Provide expertise in the implementation and use of the PeopleSoft Campus Solutions module; identify the business requirements of the University to be affected by the implementation of the modules, coordinate and lead the identification of current state operations and analyze where the software fit-gaps occur and provide recommendations for solutions, involve business owners in each process, and identify enhancement, interface, report, and conversion requirements.
- Create, maintain and manage the project plan, budget, and resource assignments.
- Facilitate decision making process required to successfully execute project plans.
- Perform hands-on team member responsibilities as necessary.
- Participate in the resolution of problems, concerns and issues on an as needed basis.
- Participate in 24 x 7 on-call rotation to ensure timely support of system.
- Assist with internal and external communications regarding the business systems implementation project and on-going support.
- Develops project status reports.
- Communicates project status to department management, executives and business sponsors.
- Promote open flow of communication and build team relationship.
- Successfully went live in June 2011. Continue to assist UT Southwestern in managing the production support of the system as well as defining the processes/structures for managing future enhancements, scope, etc.
- Coordinate integration activities with PeopleSoft HCM and Campus Solutions components.
- Coordinate with training and testing resources assigned to the implementation to: assist with the creation of test scenarios/scripts; coordinate testing efforts with the testing team; verify and validate results of conversion efforts and testing results; coordinate end-user acceptance testing; assist training team with the creation of end-user training and training materials as necessary, and assist with the delivery of end-user training as necessary.

Role: ERP Specialist, Student Records

- Managed Campus Solutions Student Records and Academic Advising project team and served as primary customer contact.
- Defined and maintained project plan and schedules.
- Monitored compliance with definitions of project scope, timelines, and deliverables.
- Provided regular project status reports to customer and internal management.
- Assisted business analysts of lower grade to coordinate projects.
- Collected, interpreted, and documented specifications required to develop new and revise existing software applications.

- Developed and implemented operational plans for new and existing business computer applications.
- Participated in development of project proposals for customers.
- Coordinated testing of new applications and changes to existing applications to ensure integrity and quality of data while providing and/or assisting in training of system users.
- Defined and developed test scenarios.
- Documented and tracked status of application errors and related issues in problem log.
- Assisted programmers and business analysts in analyzing and resolving problems.
- Compiled complete, concise, and comprehensive policies and operation procedures to assist in communicating issues to applicable management staff.
- Developed new system administrative procedures required, utilizing new functionality resulting from systems changes.
- Assisted in developing and implementing business strategies in departments to improve operational processing and productivity.
- Monitored development of specifications and establishes priorities for accomplishing design and testing of various projects.
- Coordinated Student Records conversion efforts.

University of Massachusetts – Boston, Dartmouth, and Lowell

Role: Functional Lead

- Review customizations, complete fit/gap sessions and document materials for a PeopleSoft 8.0 to 9.0 Student Records upgrade. Lead preview sessions for PeopleSoft 9.0 and set up Student Records configurations, including self-service. Assist with creation of test plan and test scripts for PeopleSoft 9.0 Student Records, assist with chapter 1 and chapter 5 requirements and compare report evaluation. Provide various business process guides. Test prototype of Student Records in PeopleSoft 9.0. Lead implementation of new PeopleSoft functionalities, including XML transcript, student appointments, and population select and update. Provide PeopleSoft 8.0 production support. Provide PeopleSoft 9.0 go live and post go live production support.

Coppin State University

Role: Functional Lead

- Led training sessions for PeopleSoft 9.0 population select and update, XML transcript and Academic Advising report setup and modification. Provided business process guides on class permissions, population select and update. Set up Student Records and Academic Advising configurations. Tested prototype of Student Records and Academic Advising in PeopleSoft 9.0. Provided go live and post go live PeopleSoft 9.0 production support, including tracking and resolving issues.

Bowie State University

Role: Functional Lead

- Reviewed customizations, completed fit/gap sessions and documented materials for a PeopleSoft 8.0 to 9.0 Student Records and Academic Advising upgrade. Led preview sessions for PeopleSoft 9.0 and set up Student Records and Academic Advising configurations, including self-service. Created test plan and tested scripts for PeopleSoft 9.0 Student Records and Academic Advising, assisted with chapter 1 and chapter 5 requirements and compare report evaluation. Provided various business process guides. Tested prototype of Student Records and Academic Advising in PeopleSoft 9.0. Led implementation of new PeopleSoft functionalities, including grading basis mapping rules, class associations, roles and permission lists, and academic advising requirements, and requisites. Provided PeopleSoft 8.0 production support.

Frostburg State University

Role: Functional Lead

- Led preview sessions for PeopleSoft 9.0 and set up Student Records and Academic Advising configurations, including self-service. Led training sessions for PeopleSoft 9.0 population select and update XML transcript and Academic Advising report setup and modification. Reviewed customizations, completed fit/gap sessions and documented materials for a PeopleSoft 8.0 to 9.0 Student Records, Academic Advising and Reporting upgrade. Created test plan and test scripts for PeopleSoft 9.0 Student Records. Tested prototype of Student Records and Academic Advising in PeopleSoft 9.0.

University of Maryland–Eastern Shore

Role: Functional Lead

- Led preview sessions for PeopleSoft 9.0. Reviewed customizations, completed fit/gap sessions and documented materials for a PeopleSoft 8.0 to 9.0 Student Records and Academic Advising upgrade, including Self Service. Created test plan for PeopleSoft 9.0 Student Records, Academic Advising, and Reporting and assisted with chapter 1 requirements. Tested prototype of Student Records and Academic Advising in PeopleSoft 9.0.

University

Role: Functional Lead

- Developed and edited preview and fit/gap materials for a PeopleSoft 7.6 to 9.0 Student Records upgrade, including Self-Service. Led preview and fit/gap sessions for PeopleSoft 9.0 Student Records. Created test plan and developed test scripts for PeopleSoft 9.0. Tested prototype of Student Records in PeopleSoft 9.0. Created Student Records security matrix for implementation with Polytechnic's security lead.

University of Central Florida, Registrar's Office – Orlando, Florida

Role: Assistant University Registrar

- Responsible for directing, coordinating and integrating the University course and general purpose classroom scheduling system, registration and grades processing systems, student record document imaging systems, enrollment statistics and associated report development and generation, and responding to end-user questions and problems on those systems.
- Managed and coordinated the university master schedule, including PeopleSoft class scheduling, facilities management, scheduler training and security, course catalog update and interface with external databases, and Resource25, design and production of associated reports, and for the preparation, coordination and maintenance of the online schedule of classes and course catalog.
- Responsible for coordination, oversight and troubleshooting of the PeopleSoft student information system (including online self-service, walk-in, and control functionality); initiated and maintained the appointment time assignment programs and processes; responsible for enrollment statistics and associated report development and generation.
- Responsible for trouble-shooting, testing, and development of modifications to University student records pages and processes in PeopleSoft 8.0 and 8.9. Integrally involved in upgrade from PeopleSoft 8.0 to 8.9.
- Served as liaison between the deans, department chairs, college and school representatives and the Registrar's Office for operational support functions.

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- Worked extensively with computer programmers and database administrators to modify the student information system to meet the functionality needs of the university community.
- Developed, implemented and interpreted university-wide policy with administrators, faculty, staff, and students.
- Provided counsel and information to students, parents, faculty, and staff for grades, room scheduling, registration, FERPA, PeopleSoft, and the SASS audit system.
- Responsible for the direction and development of operational and data processes and calendars for student records, including online web services.
- Provided registration data monthly for the university to the National Student Clearinghouse for enrollment of over 42,000 students.
- Managed and supervised section personnel, including the hiring and evaluating of employees in compliance with all affirmative action and university equal opportunity regulations. Provided leadership and direction to all registrar personnel.

Role: Student Records Trainer

- Coordinated the planning, development, and delivery of Student Records training ensuring that Registrar's Office staff and University personnel were properly informed of the functions and use of computer systems used within PeopleSoft Student Records and other Student Records systems or programs. Managed the Student Records Training/Security team.
- Designed, developed, and updated hardcopy and web-based materials and business processes for information, general reference, and training sessions.
- Analyzed, utilized, and evaluated assessment tools that measured the success factors and efficacy of training sessions and communication methods.
- Provided resource capability for troubleshooting and general assistance to University personnel.
- Coordinated with Computer Services staff and LEAP Training Team to organize University-wide and module specific training efforts and to maintain refreshed test databases.
- Delivered Orientation presentations for Registration and FERPA.

Buffalo State College, Registrar's Office – Buffalo, NY

Role: Assistant Registrar

- Coordinated and managed the implementation of the Degree Navigator student audit system, including directing the reconciliation of data between Degree Navigator and the former audit system. Supervised Registrar's Office team dedicated to the audit system.
- Instructed campus faculty, staff and students on the usage of Degree Navigator, as well as instructed various campus staff members to deliver training to faculty, staff, and students.
- Provided user and technical support for campus audit system for all campus users, including departments, admissions, faculty, staff, and students.
- Created, proofed, and edited degree programs and minors in Degree Navigator and interfaced with academic departments for confirmation of degree programs.
- Enhanced service through the supervision and maintenance of the Registrar's Office web site, including the addition of web pages pertaining to the student audit system and student information system.
- Provided data and reports as requested by the Registrar.
- Supervised over twenty Registrar's Office staff members during online registrations utilizing Oracle's Student Information System.

Education/Certifications/Training/Presentations

Name: Tina S.

Role: Functional Consultant – Campus Solutions

- Buffalo State College – Buffalo, New York
  M.S. Student Personnel Administration, December 2001
- Buffalo State College – Buffalo, New York
  B.S. Criminal Justice, Summa Cum Laude, May 1995
- "Synch or Swim – Integrating Separate Instances of Campus Solutions and HCM", Alliance Conference, March 2012
- "What's Up Post Doc? Servicing the Postdoctoral Community in Campus Solutions", Alliance Conference, March 2012
- "Synch or Swim – Integrating Separate Instances of Campus Solutions and HCM", SHRUG Conference, July 2012
- "UCF End-of-Term Prerequisite Checking using the Validation process", Alliance Conference, March 2007
- "Block Scheduling", SACRAO Annual Meeting, February 2006
- "What do you mean by that? Communication in the Workplace", Train the Trainer Series, University of Central Florida, July 2005
- "FISH! Philosophy", University of Central Florida, January 2005

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Name: Robbie d.

Role: Functional Consutlant – Campus Solutions

Overview

Robbie has more than 26 years of experience the Higher Education arena including 15 years of PeopleSoft Student Administration/Campus Solutions. Her vast expertise includes configuring, conversion, and set up of the Financial Aid, Admissions, Student Records, and Student Financial modules. This experience includes writing test scripts, developing module security, writing policy and procedure manuals, and developing training. She provides Project Management, functional leadership, and solid functional consulting.

Professional Summary

CLIENT	ROLE	PROJECT TYPE	Date
Puget Sound University	Campus Solutions Functional Lead	R9.0 Campus Solutions Implementation	2012 – Present
National Park Community College	Campus Solutions Functional Lead	R9.0 Implementation	2011 – 2012
George Fox University	Lead – Contributor Relations Communication Generation	R9.0 Implementation	2011 – 2012
PASSHE Consortium Bloomberg, Clarion, & Kutztown Universities	Lead - Financial Aid Functional, Campus Community Functional	R9.0 Implementation	2009 – 2011
Anderson University	Lead - Financial Aid Functional	Financial Aid Implementation	April 2009-2010
Moraine Park Technical College	PeopleSoft Consultant	Student Admin Implementation	June 2006 – June 2007
College of Lake County	PeopleSoft Consultant	Business Process Consulting	March 2005- June 2006
Northern Arizona University	Associate Director of Enrollment Services/Director of Financial Aid	Employee	2004 – 2005
University of Bridgeport	Director of Financial Aid	Employee	2003 – 2004
New York Institute of Technology	**Role 1:** Associate Dean for Compliance Office of the President **Role 2:** Director of Financial Aid ~ Admissions and Financial Aid Division	Employee	2002 – 2003
Pace University	**Role 1:** University Director of Financial Aid and Policy Research **Role 2:** Enrollment Management Division	Employee	2001 – 2002

Key Qualifications

- 26 years of experience in Higher Education Administration
- Very knowledgeable with integration between modules.
- Project Lead/Team Lead
- Functional expert with Financial Aid, Student Financials, Admissions, and Student records modules

Professional Experience

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Name: Robbie d.

Role: Functional Consutlant – Campus Solutions

Puget Sound University **2012 – Present**

Role: Campus Solutions Functional Lead (all modules)

- R9.0 Implementation of entire CS application
- Develop and organize schedule for fit/gap discovery sessions for entire CS application
- Create timeline of go-live functionality needs for entire CS application and shared data for ERP applications
- Conduct over 100 fit/gap workshops for all CS modules at a small private institution
- Lead creation of process flow charts documenting "to be" business processing
- Lead business process reengineering to optimize use of delivered functionality and reduce data integrity errors

National Park Community College **2011 – 2012**

Role: Campus Solutions Functional Lead (all modules)

- R9.0 Production Support
- Lead reimplementation of FA Satisfactory Academic Progress
- Lead reconstruction of enrollment/student accounts/1098T
- Lead creation of process flow charts documenting business processes for all modules
- Lead business process reengineering to optimize use of delivered functionality and reduce data integrity errors
- Resolving conflicts in Program/Plan data and stacks
- Resolving Return to Title IV processing and use of the system
- Implemented Enrollment Cancellation processing
- Implemented External Award processing using File Parser mapping to include SF Waivers, Third Party Awards, and State Scholarships/Grants
- Implemented reconciliation processing between FA, SF, and FIN.
- Implemented new Graduation process functionality
- Training on admissions entry bypassing the Admissions module
- Create equations for Student Financials for tuition calculations and waivers
- Create equations for Academic Advising to assign new student advisors
- Created communications using XML for Student Financials/Student Records/Financial Aid for enrollment cancellation and warning, enrollment from waitlist processing, enrolled with an inactive program, and various financial aid letters and emails

George Fox University **2011 – 2012**

Role: Lead – Contributor Relations Communication Generation

- R9.0 Production Support
- Created communications using XML for Contributor Relations for receipts and acknowledgements filling functionality gap
- Created process flow chart documenting CommGen process for CR

PASSHE Consortium Bloomberg, Clarion, & Kutztown Universities **2009 – 2011**

Role: Lead - Financial Aid Functional, Campus Community Functional

- R9.0 Implementation
- Conduct fit/gap for financial aid and campus community modules for a collaboration of three medium sized state universities
- Create process flow charts documenting "to be" business processing
- Identify test scenarios and develop test scripts
- Lead business process reengineering to optimize use of delivered functionality and reduce dependence on customizations

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- Develop functional design documents for customizations associated with State Grants and third party work study processing
- Create file mapping for external award processing via File Parser
- Lead module user acceptance testing; training end users
- Created equations for Financial Aid for packaging and for Admissions to calculate a Predictive Grade Point Average based on College Board standards
- Created communications using XML for Admissions and Financial Aid

Anderson University **April 2009-Present**

Role: Lead - Financial Aid Functional

- Functional Lead for rapid implementation of Financial Aid module
- Configured system around business processes
- Designed security roles, created equations, implemented bolt-on solutions for State aid and 3 C's
- Reengineered the Admissions process to incorporate subjects for ACG/SMART

Bowling Green State University **July 2007 – March 2009**

Role: Lead - Financial Aid Functional

- As Functional Lead for the Financial Aid module, was responsible for Fit/Gap validation sessions, and teaching software functionality
- Completed business processes for QA/QI and Federal verification
- "Go-To" consultant for identifying problems with FA students by researching student admissions and records data
- Worked with technical team with specifications for modifications needed for BGSU processes, along with testing new functionality

Moraine Park Technical College **June 2006 – June 2007**

Role: PeopleSoft Consultant

- Implementing PeopleSoft Student Administration systems including: Student Records, Admissions, Financial Aid. The goal of the project was to complete the implementation of the SR/SF modules and to optimize existing module functionality
- Configured Student Administration system to optimize efficiency and effectiveness
- Providing conversion support from legacy systems
- Responsible for testing and prototyping
- Design of faculty workload bolt-on, and created project plan, begin functional Module Team Lead planning group, established communication plans and groups.

College of Lake County **March 2005- June 2006**

Role: PeopleSoft Consultant

- Performed a complete review of the enrollment management functions at the school as they related to financial aid
- Provided business decisions and configuration recommendations for the new aid year setup remotely
- Created a project plan and supervised the onsite contract consultants

Northern Arizona University **2004 – 2005**

Role: Associate Director of Enrollment Services/Director of Financial Aid

- Provided leadership and oversight for a $138 million dollar financial assistance program for a residential institution

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- Developed and implemented packaging models to maximize utilization of financial resources
- Completed strategic area program review for state legislative review
- Implemented telecounseling services to support enrollment services
- Developing School as Lender proposal and plan for strategic use of financial aid for retention
- Developed a strategic reorganization plan. Supervise staff of 30

University of Bridgeport 2003 – 2004

Role: Director of Financial Aid

- Providing leadership and oversight for a $32 million dollar financial assistance program for a residential institution
- Working closely with the Vice President of Finance and Administration to develop models to project adequate budgets, policies and procedures
- Implemented electronic loan and COD processing using Datatel Colleague
- Implemented school as lender program to improve student service and increase institutional revenue
- Developed plans to establish a one-stop student administrative services center. Supervise staff of 5.

New York Institute of Technology 2002 – 2003

Role 1: Associate Dean for Compliance Office of the President

Role 2: Director of Financial Aid ~ Admissions and Financial Aid Division

- Developed calendar for enrollment services compliance
- Conducted internal audits of student services operations influencing compliance
- Developed institutional policies to ensure compliance with consumer information regulations. Respond to all regulatory and compliance requests for information, serving as the chief compliance officer to the U.S. Department of Education.
- Provided leadership and oversight for a $92 million dollar financial assistance program for a multi-campus residential institution
- Conducted a strategic analysis of the institutional scholarship programs and fiscal accountability for enrollment management.
- Worked closely with the Dean of Admissions and Financial Aid to develop models to project adequate budgets, policies and procedures
- Implemented automated packaging in Datatel Colleague, capitalizing on Noel Levitz methodologies
- Participated in numerous committees, including the enrollment management committee, and community service programs. Supervise staff of 23.

Pace University 2001 – 2002

Role 1: University Director of Financial Aid and Policy Research

Role 2: Enrollment Management Division

- Provided leadership and oversight for a $111 million dollar financial assistance program for a multi-campus financial aid operation
- Conducted a strategic analysis of the federal student loan programs
- Conducted a skills assessment and designed a training program to develop the skills and abilities of staff members. Supervise staff of 28.

Various Consulting Engagements 1999 – 2001

Role: Principal Student Administration Consultant

- Implementation Partner/Functional Lead/Coach – implementing integrated student administration systems in the various offices, Enrollment Management, Admissions, Academic Advising, Student Records, Financial Aid, and Student Financials at a variety of schools. Conducted technology and operational assessments for institutions involved in RFP vendor selection projects.

Cleveland State University **1995 – 1999**

Role: Director of Financial Aid: Enrollment Services Division

- Directed $68 million dollar financial aid program at an urban commuter institution
- Proposed and developed policies to implement a $300,000 Short Term Emergency Loan Program
- Successful grantsmanship for $100,000 student book grant program, $10,000 student employment research project, and $7,000 early awareness program initiative
- Completed grant for $3,500 center for financial aid resources
- Implemented Financial Aid module of new ERP software. Designed and developed User Guides for staff reference and training
- Served on the Implementation Steering committee and selected to serve on the initial Financial Aid Product Advisory Group for the PeopleSoft Product Strategy Group
- Delivered workshops for "To Mod or Not to Mod" and "Mass Change and Financial Aid Processing" for financial aid systems. Supervised staff of 23.

Western Wyoming College **1989 – 1995**

Role: Director of Financial Aid: Student Services Division

- Directed $3 million dollar financial aid program at a residential community college.
- Returned office to full compliance within six months of hiring following a seriously negative program review. Subsequent audits reported no findings of non-compliance.
- Increased financial aid participation by over 400% and expanded/coordinated services to students at eleven outreach centers.
- Expanded total financial aid expenditures by over 300%, including federal, state, institutional, and foundation support. Obtained financial sponsorship, designed and developed a video and corresponding handbook entitled "A Guide to Financial Aid", distributed to service area high schools and libraries to disseminate financial aid application information.
- Initiated and conducted Annual Donor Appreciation event, bringing together donors and student recipients, to recognize donors and promote philanthropy.
- Completed full office automation. Served as a member of the State Student Coordinating Committee for the statewide implementation of Datatel Colleague; leading the institutional financial aid module.
- Designed and developed User Guides for staff reference and training.
- Presented workshop for "How to Implement a System" at a USA Group Users Conference. Supervised staff of 5.

Casper College **1986 – 1989**

Role: Financial Aid Specialist: Admission Services Division

- Administered financial aid at a residential community college. Participated in Title III Grant, delivering two workshops on "Higher Education and the Displaced Homemaker".
- Completed office automation.

Education:

- University of Phoenix Phoenix, AZ Ed.D., Educational Leadership
- University of Wyoming Laramie, WY M.A., Organizational Management

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Name: Robbie d.

Role: Functional Consutlant – Campus Solutions

- Casper College Casper, WY B.S., Business Management - A.Bus., Business Administration

Conference Presentations:

- Presenter at Northeast Regional User Group conference on topics including "Custom Mass Change and the 3C Engine."
- Presenter at PeopleSoft Higher Education Special Interest Group conference on topics including "Mass Change and Business Processing" and "To Mod or Not to Mod"
- Presenter at User Group conferences on topics including "How to Implement a System"

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Name: Peter H.

Position: Functional/Technical Consultant

Overview

Peter is a certified functional and technical professional and has over 20 years of PeopleSoft hands-on technical, functional, and project management experience, with 13 of the 20 years in higher education environment. He has successfully implemented 13 complete lifecycle and 7 upgrade and enhancement of PeopleSoft projects. He has the unique distinction of having implemented every Campus Solution module as well as Financials suites. He has also directed HRMS technical operation and managed an upgrade. He has extensive knowledge of integration points among the products. Prior to consulting, he held such roles as business unit comptroller for fortune 100 companies, treasurer, and information systems director. Peter has also served as a technical and functional boot-camp instructor for PeopleSoft University.

Professional Summary

CLIENT	ROLE	PROJECT TYPE	DATE
National Park Community College	Functional Lead	CS Implementation	2012
Berkeley College	Functional Lead	CS Production Support	2012
Lone Star College Systems	Interim Executive Director	FIS, HCM Upgrade	2011 – 2012
UT Southwestern Medical Center	Functional Lead	CS Implementation	2011
Alabama State University	Functional Lead	CS Implementation	2009 – 2011
Kamehameha Schools	Functional Lead	CS Implementation	2011
Illinois Central College	Functional Lead	CS Implementation	2011
University of Wisconsin-Eau Claire	Functional Lead	CS Implementation	2010 – 2011
Azusa Pacific University	Functional Lead	CS Implementation	2009
Fredrick Community College	Technical Lead	CS Implementation	2009
University of Texas – Dallas and University of Texas – Tyler	Technical/Functional Lead	CS Implementation	2008 – 2009
The University of Southern Mississippi	Technical/Functional Lead	CS Upgrade	2007 – 2008
Maricopa Community College Systems	Functional/Technical Lead	CS Implementation	2006 – 2007
University of Maine System	Functional/Technical Lead	CS Implementation	2006
Catholic University of America	Functional/Technical Lead	CS Implementation	2005 – 2006
MiraCosta College	Functional/Technical Lead	CS Implementation	2005
Cornell University	Functional/Technical	HCM Upgrade	2005

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Name: Peter H.

Position: Functional/Technical Consultant

CLIENT	ROLE	PROJECT TYPE	DATE
	Advisor		
Fredrick Community College	Functional/Technical Lead	CS Production Support	2005 – 2006
Florida International University	Functional/Technical Lead	CS Production Support	2005
University of Pennsylvania	Functional/Technical Lead	CS, Portal Implementation	2004 – 2005
The University of Southern Mississippi	Functional/Technical Lead	CS Production Support	2003 – 2005
Gemological Institute of America (GIA)	Functional Lead	CS Implementation	2002 - 2003
West Chester University of Pennsylvania	Project Manager/Technical Lead	CS Implementation	2001 – 2002
Bryn Mawr College	Functional/Technical Lead	CS Implementation	2000 – 2003
St. Thomas University	Functional/Technical Lead	CS Implementation	1999 – 2000
Northern Alberta Institute of Technology	Functional Lead	CS Implementation	1999
University of Phoenix	Technical Developer	CS Implementation	1998 – 1999
Imperial Sugar	Functional Lead	FIS Implementation	1997 – 1998
Duke Energy	Functional Lead	FIS Implementation	1997
Boy Scouts of America	Functional Lead	FIS Implementation	1995 - 1997

PeopleSoft Application Expertise

- Recruiting & Admissions
- Financial Aid
- General Ledgers
- Accounts Receivable
- Accounts Payable
- Application Designer
- PeopleCode
- Communication Generation
- Campus Community
- Student Records
- Budgets
- Asset Management
- Project Tracking
- Application Engine
- Security
- Application Messaging
- Student Financials
- Contributor Relations
- Billing
- Procurement
- PeopleTools
- SQR
- Query
- Equation Engine

Additional Professional Experience

PeopleSoft	Project/Account Manager	1997 – 1998
Boy Scouts of America	Information Systems Director	1989 – 1997
Abbott Laboratories	Business Unit Controller	1987 – 1989
Boots	Accounting Supervisor	1983 - 1987

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Pharmaceuticals

Professional Summary

National Park Community College

- Reviewed the nature of community college business process to assess requirements to discontinue inactive students. Designed and developed process to automate discontinuing inactive students with Equation Engine. Analyzed systemic issue relating to returning students with interment enrollment without base calculation. Analyzed delivered SAP and related SAP library program. Designed and modify Application Engine to address 'Pass 2' routine to honor prior status comparison based on user configurations

Berkeley College

- Oversaw the design and validation of changes in system configuration for accounting of deferred revenue treatments. Developed test scripts to validate resulting journals. Collaborated with Campus Solution and Financial resources to coordinate testing; compiled resulting workbook and developed report to verify findings.

Lone Star College Systems

- Served as an Executive Director for the largest community college in Texas with a total enrollment of more than 90,000 students. Managed day-to-day activities of and operations of PeopleSoft Financial Systems and HRMS. Mantled 10 professional staff to coordinate and provide functional and technical support of PeopleSoft applications. Oversaw the redesigning of Chart of Accounts combination rules; enhancement to Talent Acquisition Manager Module; and HRMS upgrade.

UT Southwestern Medical Center

- Designed and developed tuition framework for medical career, which are based on medical year, and graduate careers based on traditional terms. Developed fees and waivers formula with Equations Engine. Designed complex payment plans for medical career with loan disbursements partially refundable and applicable to installments. Oversaw application of bundle 22 which enabled AP refunds via direct deposits while dismantling customization. Designed accounting treatments to streamline departmental scholarship payment for qualified medical studies.

Alabama State University

- Led a complete life cycle implementation of Student Financials. Successfully designed and executed the plan to enable ASU to report to the state that students' accounts were reconciled with the financial systems for the first time in school's history. Developed project plan and coordinated integration points. Student Financials and Contributor Relations Fit Gap sessions were conducted. Introduced best business practices and redesigned the accounting scheme to strengthen internal control while improving the reconciliation process. Conducted knowledge transfer sessions with team members; Conducted modeling sessions to proof concepts. Designed conversion requirements and data mapping. Developed Equation Engine to formulate complex tuition assessments. Designed and developed queries for the school's Financial Aid, Student Records, and Student Financials operations.

Kamehameha Schools

- Worked with Kamehameha Schools as subject area expert to plan and conduct fit/gap sessions to deploy and adapt PeopleSoft CS, HCM, and FSCM to manage K-12 programs. Develop and review of requirements identifying common process elements between the PeopleSoft HCM, FSCM and CS areas. Conduct workshop sessions to identify gaps for

identified common process elements and to determine resolutions. Identify and document common processes across two or more of the PeopleSoft HCM, FSCM and CS areas; assist and recommend process changes that KS should make to allow KS' processes to work best with the PeopleSoft system.

Illinois Central College

- Leading ICC team to leverage the 9.1 system upgrade process in redesigning Student Financials configurations, and to reengineer business processes in addressing the challenges inherited from the current state of configurations. Conducted design workshop sessions and reviewed current system configurations. Proposed alternative designs and made recommendations to help simplify accounting treatments while improving internal control. Developed systematic procedure designed to reconcile student receivable balance with general ledger balance. Reassess all student financials processes to facilitate operations and to automate manual intensive functions. Recommend and redesign tuition formula with the introduction of Equation Engine to automate complex tuition assessment, including pre-negotiated rate contracts.

University of Wisconsin-Eau Claire

- Provided post implementation supports to troubleshoot Student Financials configurations. Conducted system redesigning workshops and developed reports to resolve and reconcile student receivable balance based on Wisconsin's quasi-cash accounting principles. Troubleshot configuration issues and conducted knowledge transfer sessions on Charge and Payment Priorities to be Title IV compliant and to address operational concerns. Developed custom queries to support student financials operations.

Azusa Pacific University

- Addressed post go-live issues related to original configurations. Redesigned tuition calculation process flow; payment application scheme; and due date configuration to reflect current business processes. Designed and implemented comprehensive Payment Plan with automatic adjustment to unbilled installments; developed population selection queries to support mass contract assignments; configured and deployed Billing processes. Troubleshot and reorganized tuition calculation schemes. Designed and implemented comprehensive collection solutions; developed queries used for collection management; developed population selection to assign mass collection letters to students placed in collection cycle. Configured comprehensive Communication Generation processes and conducted trainings to generate collection letters. Solutions were developed that assessed interest charges and External File Load processes. Developed queries that calculated interest fees, then loaded those fees into group posts.

Fredrick Community College

- Redesigning the chart of accounts and retroactively converted historical data to reflect the new design back to the beginning of time. Analyzed impact on Human Capital Management, Campus Solution, and Supply Chain systems; developed strategy; developed conversion scripts; and executed conversion scripts on live environment without service interruption to school's constituents. Project involved two databases, bi-directional Application Messaging, and 6 hosted environments.

University of Texas – Dallas and Tyler

- Co-developed the TS189 EDI process to interface and automate admission applications that loads data from the State of Texas Centralized Application System into PeopleSoft; developed dynamic codes based on schools' event definitions to create appropriate

checklists for the admissions process. Designed accounting treatment schema for item types; designed and developed all interfaces coming into SF and going to auxiliary systems. Developed daily cash reconciliation reports and student receivable reports. Troubleshot configurations issues. Implemented customized financial aid communication process to assign checklist to ISIR process based on dynamic conditions; configured external award and external file processes; configured equation engine for loan packaging.

The University of Southern Mississippi

- Sole Functional and Technical Consultant in guiding USM from planning through the complete lifecycle of upgrade from 8.0 to 8.9. Evaluated delta between 8.9 and 9.0 and presented findings and assessments for management to make upgrade strategy. Conducted daily workshops to transfer knowledge; assess business process to formulate best practice and to leverage system functionalities for Campus Community, Recruiting, Admissions, Student Records, Financial Aid, Student Financials, and Contributor Relations. Prototyped new functionalities, such as equation engine; student centers; student refunds through payroll; and search match configurations. Customizations were designed and developed as needed such as the modification of Self-Service Centers. Analyzed and developed a complete solution to load and to create prospect records from data collected by recruiters.

Maricopa Community College System

- Functional Lead and Technical Analyst in the development and testing of PeopleSoft 8.9 Admissions/Registration customizations based on quick admit process. Designed and developed 3Cs, including knowledge transfer of 3Cs configuration, trigger developments; and transition to emailing students. Addressed consolidation of 12 databases into single multi-institutions Campus Community database. Troubleshot PeopleSoft Academic Advisement and Student Records setups; facilitate business process design sessions with deans from each college.

University of Maine System

- Served as Functional Lead and Technical Analyst in collaboration with representatives from seven institutions (nine campuses) in the Maine system, designing a central online PeopleSoft 8.9 Admissions application. Developed both proof of concept and identity gaps. Designed institution and subject specific intelligent process flow with institutional branding. Analyzed and developed extension to TS189 external load process to supplement required data not being met by delivered integration design.

Catholic University of America

- Functional Lead and Technical Developer in developing customized triggers to assign Checklists and Communications to prospects and applicants based on multiple conditions. Developed a dynamic code for Admissions batch interface in order to automate Checklist and Communication based on user criteria. Reorganized 3Cs event definitions; configured trigger definitions; conducted knowledge transfer sessions; and established automated checklist update procedures. Analyzed reporting and data extraction requirements designed and developed custom reporting tables (data warehouse). Reviewed Admissions business practices and advised CUA on business best practices and incorporating PeopleSoft 8 functionality to support operations

Mira Costa College

- Served as Functional Lead and Technical Developer in the implementation of Contributor Relationship module. Conducted fit/gap and training, then prototyped and migration of

contributor relations processes onto the production SA suite. Enabled development office to go-live with the system in 5 weeks.

Cornell University

- Functional and Technical Advisor in Conducting fit/gap and knowledge transfer sessions with HRMS, payroll, contributor relations, admissions, student records, campus community, security, and data warehouse teams in preparation of PeopleSoft 8.9 upgrade. Analyzed existing customizations to access remediation plan for the upgrade path. Previewed new functionalities with users and developers and reviewed business processes.

Fredrick Community College

- Functional Lead and Technical Developer in developing audit reports and analyzing system configurations to reconcile PeopleSoft Student Administration transactions with accounting journals. Student system transactions were identified and reconciled with the school's general ledger. Conducted weekly knowledge transfer sessions; reviewed business processes; made recommendations to streamline business process while improving internal controls. Reconciled General Ledger balance to Student Financials account balance to the exact amount for the first time since system went lived over three years ago. Redesigned PeopleSoft 8 General Ledger interfaces attributes; reconfigured Accounts Payable/refund integrations; established control accounts; developed housekeeping procedures and internal control reports.

Florida International University

- Functional Lead and Technical Developer in designing and developing process to reconstruct accounting entries for prior transactions based on corrected accounting attributes. Analyzed and identified reconciliation issues between PeopleSoft 8 Student Financials and General Ledger. Account aging processes with the placement of automated service indicators were configured and implemented. Developed a solution to resolve refunds involving over 10,000 students; configured 1098-T setups and developed a means to process 1098-T with data between PeopleSoft Student Administration and the legacy system. Multiple third-party billing formats that included waivers and fee triggers were configured and troubleshot. Conducted knowledge transfer for tuition calculation, student group and fee trigger criteria, term fee configurations, billing and due date calendar, adjustment calendar, and tuition controls.

University of Pennsylvania

- Functional Lead, Technical Advisor & Training Developer in leading proof of concept workshops to design and prototype PeopleSoft 8 Contributor Relations and Enterprise Portal for 17 schools under the PENN systems. Led design sessions for Campus Community, interfaces, security, gifts distributed processing, and system configurations. Designed technical specifications and developed customizations to close gaps. Designed and developed scripts to convert $2.8 million gifts transactions. Designed custom acknowledgement process for each school/fund raising centers to meet their complex requirements; prototyped 3Cs configurations for complex communication requirements. Advised for the creation of and developed training materials. Fabricated data elements needed to support hands-on training of over 400 concurrent users.

The University of Southern Mississippi

- Functional Lead and Technical Developer in leading the USM foundation, alumni associations, athletic club, and information technology departments in the re-implementation and design of PeopleSoft 8 Contributor Relations to take advantage of

the new Business Unit and SETID functionalities. Developed conversion programs to convert data from PeopleSoft 7.6 to 8. Configured Application Messaging components to meet integration requirements and customized financial interface. Designed and developed data warehouse for alumni associations. Troubleshot Student Financials' student self-services functionality; developed customized meal plan interface for Student Financials; designed and configure 3Cs to generated acknowledgments, solicitations, and correspondences.

Gemological Institute of America (GIA)

- Led multiple departments in the implementation of integrated system to supports GIA prospects management and public relations functions. Reengineer fund accounting structure to leverage "natural" process flow that streamlines the gift and pledge processing while satisfying fund accounting treatments.
- GIA is an institution with worldwide membership organizations; as such, led prototyping and workshop sessions in the designing and development of worldwide membership system. Designed and developed contents to support corporate Portal.

West Chester University of Pennsylvania

- Technical Lead and Project Manager in leading the complete project lifecycle for PeopleSoft Admission and Advancement implementation. Conducted fit/gap sessions for undergraduate and graduate admissions, configured and developed 3Cs communication, and developed custom prospect database to segregate prospects from applicant data. Addressed inherited duplicate ID issue by developing automated script to merge duplicate data. Designed and developed conversion programs. Developed project plan and formulated strategies to deploy Admissions on to a production database that was live with Campus Community and Contributor Relations. Designed and developed bi-direction interfaces to integrate PeopleSoft with legacy system to minimize business interruption while enabling a phase approach to minimize project risk. Implemented an Optical Character Recognition (OCR) solution to manage the volume of mail-in admission applications.
- Technical Lead and Project Manager in designing and developing scripts to converted Contributor Relations, Campus Community, and Admissions from PeopleSoft 7.6 to 8. Troubleshot new tools in such as Application Messaging and Student Administration to Financials interfaces. Designed and developed a custom reporting tables' structure and the supporting SQR/SQC to populate operation data storage. Developed training materials and conducted user trainings. Led fit/gap sessions on Student Records implementation and advised team on Academic Structure and course catalog data mapping. Developed project plan and orchestrated implementation activities for Advisement, Student Financials, and Financial Aid.

Bryn Mawr College

- Served as Functional Lead and Technical Developer in implementing 7.6 Advancement then upgrading to 8.0 Contributor Relations on time and within budget. Led project with rapid implementation methodology developed for IBM. Designed system integration for Contributor Relations, Student Financial, and General Ledger; consulted on best practice processes and prototyped business processes; and customized 3Cs process for gift and pledge receipts for People and organization. Oversaw development requirements for Campus Community requirements and made customization to accommodate joint communication and salutations. Developed custom SQRs with dynamic parameters to produce on-demand comprehensive constituents' reports; designed and developed data

warehouse structures and the supporting SQR/SQC. Guided conversion developments. Developed training materials and conducted user training.

St Thomas University

- Functional and Technical Lead in implementing 7.6 Advancement, then upgrading to 8.0 Contributor Relations on time and within budget. Commissioned by IBM consulting to develop rapid implementation tools and templates for Contributor Relations and Campus Community. Developed user training curriculum. Led system configurations and 3Cs configurations. Customized Campus Community to accommodate joint communications and salutations. Collaborated with PeopleSoft developers and Global support resulting in PeopleSoft 7.6 bundled releases; and led system integration design among Advancement, Student Financial, and General Ledger.

Northern Alberta Institute of Technology

- Developer in designing and developing on-demand printing solution for students' receipts. Analyzed business requirements; developed solutions in time to enabled NAIT to meet their go-live date. Customized cashiers receipts on demand with dynamic printer redirection. Customized tuition calculation logic based on enrolled programs and student residency.

University of Phoenix

- Worked as Technical Developer in developing the technical requirements that would automate three-day loan disbursement process between legacy system & PeopleSoft Financial Aid solutions. Developed custom reports; assisted in data clean up and Regulations upgrades.

Imperial Sugar

- Project manager in successfully led seven financial and distribution modules in seven months. Facilitated prototyping workshops to facilitate rapid system configurations. Advised management in re-engineering business processes and in using applications to consolidate and standardize multi-states operations.
- Simultaneously implemented Accounts Receivable in two months (vendor's shortest implementation record), which enabled the client to save over 300 man-hours in 'throw-away' codes in their current legacy system to accommodate one of their newly acquired businesses.

Duke Energy

- Engaged as PeopleSoft's account manager at first, but transitioned into consulting role as requested by Duke Energy to salvage project that was at risk; successfully led project team in delivering Receivable and Billing modules in three months.
- Provided project management and product expertise for Duke Energy in preparation of deregulation opportunities. Managed issues resolution, designed system configurations, guided integration, designed interfaces, and developed custom reports. Identified and defined business process reengineering opportunities.

Boy Scouts of America National Office

- Defined system requirements and consulted with executive team in software selection. Developed and presented financial and operational justification in the selection process. Successfully let the implementation of treasury systems on time and on budget. Developed custom application to support unique non-profit business operations. Managed treasury operations for national scouting events.

Education/Certifications/Training/Presentations

Name: Peter H.

Position: Functional/Technical Consultant

- MBA, MIS specialization, Amber University
- BA, Accounting, Louisiana State University
- PeopleSoft Certified Technical Consultant
- PeopleSoft Student Administration
- Certified Public Accountant
- Certified Cash Manager

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Name: Paula S.

Role: Sr. PeopleSoft Functional Consultant-HCM

Overview

Paula's comprehensive experience includes over ten years in the implementation and support of PeopleSoft HRMS, Payroll, Benefits, Time & Labor and change management. Paula recently completed her fifth implementation of the PeopleSoft Talent Acquisition Manager module. Her knowledge of the eRecruit (now Recruiting Solutions) module from earlier versions combined with her experience of version 8.9, 9.0, and 9.1 make her an invaluable asset on any recruiting team. Paula has technical development expertise in SQRs, Queries, Crystal reports, as well as SQL. In addition, she has applied and tested upgrades and updates and has excellent troubleshooting skills.

Professional Summary

CLIENT	ROLE	PROJECT TYPE	DATE
Univ. of Puget Sound	HCM/Recruiting Lead	PeopleSoft 9.0 CS, 9.1 FIN/HCM Implementation	June/2012-May/2013
MIS, Inc.	UPK Developer	In-house UPK Development	Oct/2011-June/2012
City of Lakeland	HCM Lead	PeopleSoft 8.9-9.1 HCM Upgrade	June/2011-Oct/2011
Baystate Health System	HCM Lead	PeopleSoft 8.9-9.1 TAM Upgrade	Feb/2011-June/2011
National Park Community College	HCM Lead	PeopleSoft 9.0 CS/FIN/HCM Implementation	Apr/2010-Jan/2011
Darden Restaurants	TAM Implementation Lead	PeopleSoft TAM Implementation	Mar/2009-Mar/2010
University of Waterloo	TAM Upgrade Lead	PeopleSoft TAM Upgrade	Jan/2009-Mar/2009
George Fox University	HCM Lead	PeopleSoft 9.0 CS/FIN/HCM Implementation	Mar/2008-Dec/2008
Orange County Government	TAM Implementation Lead	PeopleSoft TAM Implementation	Mar/2007-Dec/2007
University of Missouri System	Project Lead	PeopleSoft Multi-campus TAM Implementation	Aug/2006-Feb/2007
Ferguson Enterprises	Functional Project Lead	PeopleSoft eRecruit to TAM Upgrade	Mar/2006-July/2006
City of Lakeland	Functional Project Lead	PeopleSoft 8.3-8.9 HRMS Upgrade	Aug/2005-Feb/2006
T. Rowe Price	Sr. Functional Analyst	PeopleSoft HRMS Reporting Strategy Creation	Feb/2005-Mar/2005
Florida A&M University	Sr. Functional Analyst	PeopleSoft 8.8SP1 Recruit Workforce and eRecruit Implementation	Jan/2005
Watkins Motor Lines	Functional Lead	PeopleSoft 8.3-8.8 HRMS Upgrade	May/2004-Jan/2005
Lexmark	HR Functional Consultant	PeopleSoft 8.3 HR Training	Apr/2004

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Name: Paula S.

Role: Sr. PeopleSoft Functional Consultant-HCM

University of Florida	HRMS Functional Lead	PeopleSoft 8.8 HRMS Implementation	Mar/2003-Apr/2004
Lexmark	HR Functional Consultant	PeopleSoft 8.3 HR Training	Feb/2003
Darden Restaurants	HRMS/Payroll Functional Consultant	PeopleSoft 8.0 SP1 Implementation	Mar/2001-Jan/2003

PeopleSoft Application Expertise

- Human Resources
- Position Management
- Query
- Base Benefits
- Talent Acquisition Mgr
- User Productivity Kit
- Payroll
- Candidate Gateway
- Crystal Reports

Professional Summary

Client: University of Puget Sound

Project: PeopleSoft 9.0 Campus Solutions, 9.1 FIN and HCM Implementation

- Responsible for discovery, fit/gap, gap resolution and configuration of the HR/Talent Acquisition Manager/Candidate Gateway modules.
- Configuration and Testing of General Ledger Interface between HR and Financials
- Develop test scripts
- Lead unit, system, and parallel testing
- Data Conversion Mapping
- Data Conversion Validation
- Identify Security Roles and Permission List for end-users
- Create functional specifications for interfaces and customizations
- Develop custom queries
- Subject Matter Expert Knowledge Transfer
- Configuration and testing of AWE process for Talent Acquisition Manager Approvals
- Responsible for cut-over task plan at Go Live

Client: MIS, Inc.

Project: In-house UPK Development

- Developed HRMs/ Campus Solutions/Financials query reporting training v.8.51.
- Delivered training to in-house consultants.
- Developed Oracle User Productivity Kit 11.1 training documentation.
- Delivered Oracle User Productivity Kit 11.1 training to client in Tacoma, WA.
- Presenter for Oracle User Productivity Kit at the Higher Education User Group conference 2012 in Nashville, TN.

Client: City of Lakeland

Project: PeopleSoft 8.9-9.1 HCM Upgrade

- Leading fit/gap analysis, designed gap strategies and recommended business process changes to take advantage of delivered functionality
- Evaluating and testing existing customizations: Recommendations were made based on new functionality to eliminate a majority of obsolete customizations
- Providing HRMS functional support, direction and troubleshooting in upgrade tasks
- Liaison between functional users and technical developers.
- Knowledge transfer to subject matter experts on new 9.1 functionality
- Reviewing and updating Time and Labor configuration tables to utilize the approval engine for Time and Labor to approve payable time

- Configuring new 9.1 retroactive pay tables and processes tied to Event Framework and Integration Broker
- Redesigning business processes tied around Profile Management
- Validating conversion data
- Analyzing and upgrading queries and Crystal Reports (v9 to Crystal Reports 2008)
- Conducting Parallel Testing

Client: Baystate Health System

Project: PeopleSoft 8.9-9.1 TAM Upgrade

- Conducted Requirement gathering and Fit Gap sessions for 8.9 to 9.1 upgrade
- Worked along with technical and business resources, managing tasks for this project, ensuring issues/risks were identified and resolved in a timely manner
- Conducted analysis of TAM/Candidate Gateway functionality and company business practices to fine tune TAM workflow
- Introduced new functionality to client within 9.1
- "Re-educated" client on foundation of TAM/CG functionality
- Performed Unit Testing

Client: National Park Community College

Project: PeopleSoft 9.0 CS/FIN/HCM Implementation

- Responsible for discovery, fit/gap, gap resolution and configuration of the HR module.
  Responsible for G/L set up for deductions and earnings
- Developed test scripts
- Lead unit, system, and parallel testing
- Responsible for validating data conversion
- Responsible for identifying Security Roles and Permission List for end-users
- Wrote functional specifications for interfaces
- Developed custom queries and reports
- Responsible for cut-over task plan at Go Live

Client: Darden Restaurants

Project: PeopleSoft TAM Implementation

- Responsible for leading business process redesign and was able to prevent potential processing problems because of her findings
- Developed configuration documents and arranged functional demonstrations for new features in TAM
- Responsible for configuring core tables
- Responsible for leading unit testing, system testing and user acceptance testing
- Responsible for TAM roll out for three business units in the US and Canada

Client: University of Waterloo

Project: PeopleSoft TAM Upgrade

- Responsible for creating future business process flows
- Conducted Fit/Gap sessions and Developed documents to identifying the gaps and their resolutions
- Responsible for configuring core tables
- Trained in house staff on new features in TAM

Client: George Fox University

Project: PeopleSoft 9.0 CS/FIN/HCM Implementation

- Led Fit/Gap Sessions and developed Gap documents

- Responsible for designing the HCM and Payroll System including eProfile, ePay and eBenefits 9.0
- Configured the core tables for the HCM and Payroll Systems
- Responsible for testing and troubleshooting all benefit plan enrollments
- Tested and validated conversion
- Directed the technical team for conversion
- Performed unit and system testing
- Prepared Functional and Technical Specifications for System modification

Client: Orange County Government

Project: PeopleSoft TAM Implementation

- Conducted Fit/Gap Analysis
- Documented the Fit/Gap analysis and recommend resolutions for the gaps
- Responsible for configuration, testing and table set up
- Organized and delivered training to end users
- Demonstrated product to "C" level executives

Client: University of Missouri System

Project: PeopleSoft Multi-campus TAM Implementation

- Led four Universities and four Hospitals through implementation of Talent Acquisition Manager/Candidate Gateway
- Conducted Fit/Gap Analysis
- Responsible for configuration, testing and table set up
- Organized and delivered training to end users
- Demonstrate product to "C" level executives

Client: Ferguson Enterprises

Project: PeopleSoft eRecruit to TAM Upgrade

- Functional Lead on upgrade project of eRecruit to Talent Acquisition Manager
- Implemented Candidate Gateway
- Conducted configuration workshop for experienced hires/career development
- Conducted configuration workshop for college recruiting
- Worked with tech team to develop internet job posting solution
- Worked with tech team to develop resume scanning solution with Third Party product Documentum
- Configured workflow solution in upgraded test environment
- Defined functional testing and training strategy
- Developed test scripts and complete configuration guide
- Led functional user acceptance testing of TAM & Candidate Gateway

Client: City of Lakeland

Project: PeopleSoft 8.3-8.9 HRMS Upgrade

- Responsible for the upgrade of HRMS 8.3 to 8.9
- Setup the Automatic Resume Processing in the Talent Acquisition Manager Module
- Developed documentation on how to utilize the process
- Lead parallel functional testing of all modules that the City of Lakeland uses on the development servers
- Keeping track of run times and audits performed. This included:
- Biweekly paycheck batch run which includes retro pay load of Time and Labor to payroll, actual distribution and G/L interfacing; Pension paycheck batch run; Check Reversals and Adjustments on different type of employees and job recruitment and hiring process

- Designed and Set up TCD interface in Time and Labor to replace existing SQR customization.
- Assisted in designing two training programs to educate users on the HCM 8.9 software, one program for general users and the other for timekeepers
- Provided necessary support to update delivered and City of Lakeland PeopleSoft queries and crystal reports

Client: T. Rowe Price

Project: PeopleSoft HRMS Reporting Strategy Creation

- Assisted in creating a reporting strategy to enable stakeholders to more effectively produce HR reports. Formulating a reporting strategy, especially in the areas of recruiting and diversity. The objective being to document the current state both technically and functionally and recommend a road map for moving forward with an effective reporting solution to support the overall reporting objective
- Met with each area Team Lead, to gain an understanding of primary high level reporting needs, current environment and challenges, and the primary systems worked with
- Identified the information required to support HR leadership through stakeholder interviews with a particular focus on recruiting practices, EEO Compliance, and Employee Retention Practices.
- Evaluated and cataloged all client customizations for business and technical review to determine alternative "vanilla" approaches as part of the PeopleSoft 8.3 release upgrade
- Analyzed the current reporting infrastructure, systems and data
- Recommended a reporting infrastructure and systems to support the target information requirements

Client: Florida A&M University

Project: PeopleSoft 8.8SP1 Recruit Workforce and eRecruit Implementation

- Re-Evaluated and tested Recruit Workforce and eRecruit v8.8SP1 to validate configuration and ensure preparedness for Go-Live
- Met with Functional Team to confirm business processes
- Evaluated configuration for all setup tables
- Evaluation of workflow in relation to business process requirements
- Streamlined roles in security
- Tested data integrity

Client: Watkins Motor Lines

Project: PeopleSoft 8.3-8.8 HRMS Upgrade

- PeopleSoft HRMS/Payroll Functional Consultant for PeopleSoft v8.3 to v8.8 upgrade.
- Responsible for functional design and development of a Front-End customized applicant entry system to replace the eRecruit module
- Duties included unit testing and integration testing. Also worked closely with Watkins team to ensure business needs and requirements were met
- Responsible for evaluation of Recruit Workforce tables, production data clean-up of orphan rows and data integrity issues
- Responsible for evaluation of Employee tables, production data clean-up
- PeopleSoft v8.3 to v8.8 HR Upgrade including:: Fit/Gap Analysis , Unit Testing, Conversion validation
- Trained Watkins-FSG Team Lead on HRMS module

Client: Lexmark

Project: PeopleSoft 8.3 HRMS Training

- Delivered end-user training classes for PeopleSoft HRMS 8.3
- Developed custom training material for the following modules: Recruit Workforce, eRecruit, Crystal Reports, PeopleSoft Query

Client: University of Florida

Project: PeopleSoft 8.8 HRMS Implementation

- HRMS Functional Team Lead for fully integrated PeopleSoft v8.8 implementation for approx. 35,000 employees
- Responsible for HR Configuration, Activities included application design, table set-up, task planning and assignment, investigation of and recommendations on control table values to reduce customization while meeting business needs and transfer of application knowledge to University of Florida team members
- Responsible for eRecruit/eProfile, set-up and functional testing of same
- Designed roles for PeopleSoft security. Determined permissions for each role, tested each role to ensure proper access
- Assisted/tested in workflow design, customized workflow for HRMS, configured and tested workflow for eRecruit
- Facilitated HRMS/Payroll Requirements Integration Fit/Analysis sessions including documentation of implementation and custom design options, trade-off, cost-benefits, implications and recommendations
- Team member and HR Lead during full HRMS Unit Test and Integration Test cycles activities included support and analysis for tools and application implementation including documentation of application enhancements, development of test scripts, testing of the implementation and documentation of the test results. Developed user test scripts including parallel testing and acceptance testing
- Conversion Validation
- Assisted in Payroll testing and troubleshooting. Provided functional support for analysis of Payroll implementation integration and parallel testing
- Directed HR users through testing process. Developed system test plans and test cases, and user documentation for training

Client: Lexmark

Project: PeopleSoft 8.3 HRMS Training

- Delivered end-user training classes for PeopleSoft HRMS 8.3
- Developed custom training material for the following modules: Recruit Workforce, eRecruit, Crystal Reports, PeopleSoft Query

Client: Darden Restaurants

Project: PeopleSoft 8.0 SP1 Implementation

- Consultant - Payroll Functional role for fully integrated PeopleSoft v8.0 SP1 implementation for approx. 125,000 employees
- Responsible for Payroll Core Table Configuration
- Led and Organized Unit testing, Integration testing and parallel testing
- Payroll Troubleshooting
- Designed Custom system documentation
- Created business process flow charts
- Worked with functional users and trainers to create payroll training documentation and delivered End User training
- Provided hands-on Payroll postproduction support

Client: Florida Tile Industries

Name: Paula S.

Role: Sr. PeopleSoft Functional Consultant-HCM

Project: Payroll Employee

- Responsibilities included all payroll functions for 1800 employees on PeopleSoft v7.51

Education/Certifications/Training/Presentations

- Birnam Business College, South Africa
  Computer Training Diploma
- Florida Southern College, Lakeland, FL
  Bachelor of Science- Hotel/Resort Management
  Bachelor of Arts- International Management

Name: Jessica E.

Role: Functional Consultant – SIS

Overview

Jessica has over twelve years of experience working in the college and university environments with the PeopleSoft Campus Solutions ERP product. She has 9 implementations to her credit, extensive knowledge of all aspects of university Student Records, Academic Structure, Academic Advising, Campus Community, Admissions, and is especially gifted with ability to teach others and create documentation. Her excellent PeopleSoft experience, complex problem solving skills, and proven ability to motivate and work effectively with a variety of people, makes her a strong consultant.

Jessica has also expanded her consulting abilities to include admissions, SEVIS and Student Financials

Professional Summary

CLIENT	ROLE	DATE
University of Puget Sound	Functional Lead	Feb 2012 – June 013
National Park Community College	Functional Lead Student Records 9.0, Student Financials Consultant	Oct 2011 – Feb 2012
Berkeley College	Functional Lead Student Records 9.0, Academic Structure 9.0, Academic Advising 9.0	Jan 2010 – Jan 2012
National Park Community College	Functional Lead Student Records 9.0, Academic Structure 9.0, Academic Advising 9.0	Apr 2009 – Jan 2010
George Fox University	Functional Lead Campus Solutions 9.0	Sept 2008 – Mar 2009
Anderson University	Functional Lead Campus Solutions 9.0	Jan 2008 – Oct 2008
Corporate Upgrade, Chicago	Consultant	Mar 2006 – Nov 2007
City Colleges of Chicago	Consultant	Mar 2006 – Nov 2007
Heartland Community College	Consultant	Mar 2006 – Nov 2007
Moraine Park Technical College	Systems Consultant	Feb 2005 – Mar 2006
Benedictine University	Assistant Registrar	Sept 2001 – Feb 2005

Key Qualifications

- Over 12 years of Higher Education experience includes 4 years as Asst Registrar
- 9 Full Life Cycle Campus Solutions Implementations

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- Thorough knowledge of Academic Structure and the Student Records and Academic Advising Modules
- Experience setting up and configuring Course Catalog and Schedule of Classes

Professional Experience

University of Puget Sound

Date: Feb 2012 – Present

Role/Project: Functional Lead for Student Records, Campus Community, Academic Structure, Academic Advising & Admissions

- Performed Fit/Gap analysis for all Campus Solutions modules listed
- Created mapping documentation for data conversions
- Configured required Academic Structure, Campus Community, Student Records & Admission tables
- Configured Academic Advising and trained users
- Documenting business processes via flowcharts
- Documentation of all configuration
- Managed user legacy data scrubbing and preparation for conversion
- Developed testing plans, scripts and scenarios
- Provided knowledge transfer to end users
- Provided leadership on integration points to other modules
- Worked with technical team in functional requirements for LMS integration
- Configured SEVIS rules

National Park Community College

Date: Oct 2011 – Feb 2012

Role: Functional Lead Student Records 9.0, Student Financials Consultant

- Recreated purge enrollment
- Worked alongside users to correctly adjust and validate student accounts
- Restructured fee and waiver configuration
- Assisted with 1098T corrections
- Student Records data correction of user errors
- Created end user documentation

Berkeley College

Date: Jan 2010 – Jan 2012

Role: Functional Lead Student Records 9.0, Academic Structure 9.0, Academic Advising 9.0

- Conducted discovery sessions on all aspects of the Academic Structure, Student Records (Registrar), Student Financials as they relate to the Student Records (SEVIS) and Academic Advising
- Conducted Fit-gap analysis sessions for all areas.
- Business process redesign of the above areas/modules
- Configuration of tables for Student Records modules
- SME training development and delivery
- Documentation of all configurations, Business Process Redesign for Student Records and Academic Advising.
- Reconfigured Academic Structure
- Consolidated & Re-created student record history under new academic structure
- Responsible for data analysis and data scrubbing
- Updated/re structured the PS course catalog

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- Replaced vague fields of "standard" with more descriptive values
- Eliminated need for customizations with use of new structure and delivered functionality
- Assisted in TAP configuration and analysis
- Reviewing and updating security roles and permission lists
- Trained new staff on Academic Advising Module and Student Records Functionality
- Created end user documentation

National Park Community College

Date: Apr 2009 – Jan 2010

Role: Functional Lead Student Records 9.0, Academic Structure 9.0, Academic Advising 9.0

- Identified and recommended essential business process changes or additional functionality for the college including SEVIS functionality for international students.
- Along with the module leads, redesigned business processes
- Conducted business process analysis sessions for academic structure, student records, campus community, academic advising, instructor workload, and client reporting
- Designed Academic Structure, Student Records, Academic Advising
- Generated mapping documents for data conversion
- Managed user legacy data scrubbing and verification
- Supervised user acceptance testing
- Developed test scripts for records and campus community with the NPCC project team
- Provided knowledge transfer to student records
- Recreated purge enrollment
- Worked alongside users to correctly adjust and validate student accounts
- Restructured fee and waiver configuration
- Assisted with 1098T corrections

George Fox University

Date: Sept 2008 – Mar 2009

Role: Functional Lead Campus Solutions 9.0

- Performed Fit/Gap analysis for student records, academic advising, instructor workload, and client reporting
- Identified and recommended business process changes or additional functionality necessary for the college
- Worked with module leads to redesign business processes
- Configured Academic Structure, Student Records, Academic Advising
- Created mapping documents for data conversion
- Managed user legacy data scrubbing and verification
- Supervised user acceptance testing
- Assisted GFU project team in developing test scripts for records and campus community
- Provided knowledge transfer to student record module leads

Anderson University

Date: Jan 2008 – Oct 2008

Role: Functional Lead Campus Solutions 9.0

- Performed business process analysis sessions for academic structure, student records, campus community, academic advising, instructor workload, and client reporting
- Considered SEVIS functionality for international students as part of the discovery sessions.
- Worked with the college to identify and recommend business process changes or additional functionality

- Worked with module leads to redesign business processes
- Modified academic structure
- Configured Student Records
- Developed documents for mapping of data conversion
- Managed user legacy data scrubbing and verification
- Configured Academic Advising
- Supervised user acceptance testing
- Helped module leads develop test scripts for records and campus community
- Provided knowledge transfer to student record module leads

Corporate Upgrade, Chicago

Date: Mar 2006 – Nov 2007

Role: Consultant

- Reviewed and documented PS 8.9 & 9.0 delta functionality for corporate upgrade and optimization resource guide and client worksheet

City Colleges of Chicago

Date: Mar 2006 – Nov 2007

Role: Consultant

- Developed academic advising prototype
- Created academic advising configuration and set-up workbook documents
- Drafted charter and project scope for academic advising module implementation
- Participated in business process redesign project, created to-be process flows and made recommendations for future use of PeopleSoft enhanced functionality for district wide use
- Led implementation of modified attendance tracking, created functional requirement, functional specification, system configuration and user job aid documents
- Drafted functional requirements and functional specifications for NSLC reporting
- Developed training material and delivered re-training to student record staff

Heartland Community College

Date: Mar 2006 – Nov 2007

Role: Consultant

- Analyzed and reviewed converted student record data to assess clean-up efforts required
- Created detailed deliverable with focused analysis on the school's enrollment, program/plan stack and catalog/schedule.
- Made supplemental recommendations regarding more effective and efficient use of the PeopleSoft product

Moraine Park Technical College

Date: Feb 2005 – Mar 2006

Role: Systems Consultant

- Functional Lead for a PeopleSoft Student Administration 8.0 implementation
- Responsible for implementing the Student Records module
- Conducted business process analysis sessions for academic structure, student records, campus community, academic advising, instructor workload, and client reporting
- Identified and recommended business process changes or additional functionality necessary for the college
- Worked with module leads to redesign business processes
- Modified academic structure
- Configured Student Records

- Created mapping documents for data conversion
- Managed user legacy data scrubbing and verification
- Oversaw user acceptance testing
- Helped module leads develop test scripts for records and campus community
- Provided knowledge transfer to student record module leads

Benedictine University

Date: Sept 2001 – Feb 2005

Role: Assistant Registrar

- Built classes into PeopleSoft
- Oversaw the publication of the traditional undergraduate course schedule booklet each term
- Managed the scheduling of classroom assignments and classroom requests
- Posted transfer, test and other credit
- Module Lead of Student Records for upgrade version 7.6 to version 8.0
- Trained new Student Record employees on PeopleSoft 8.0
- Created PeopleSoft 8.0 documentation for Student Records
- Troubleshoot PeopleSoft 8.0 Student Records
- Performed beginning of term processes such as calendar/session/term set-up and term roll
- Assisted in design of online class offerings page (Ben U Live)
- Implemented pin numbers
- Created student record queries
- Updated crystal reports
- Performed admissions applications
- Centralized non-academic events
- Added course and class fees
- Resolved university TBA workaround
- Implemented dynamic dating

Education

- **Benedictine University, Lisle, IL**
  M.B.A. – August 2004
  Management of innovation and technology, organizational leadership, management consulting, and entrepreneurship concentrations
- **Butler University, Indianapolis, IN**
  B.S. – August 2001
  Computer science and actuarial science majors, business administration and mathematics minors

Additional:

SEVIS Training for School Officials

Name: Daniel L.

Role: Functional Consultant – Time & Labor

Overview

Daniel is a certified functional/technical HCM professional with over 14 years consulting experience, specializing in PeopleSoft HCM. Daniel's strengths lie in implementations associated with PeopleSoft Human Resources, Benefits and Payroll products. He also has experience in many of the ancillary modules including Commitment Accounting, Time & Labor, Recruiting, Competency Management and Training. Daniel has fourteen years of Payroll tax management and reporting experience that includes the development of balancing systems and designing reports and system specifications for legal and compliance requirements. His experience, vast knowledge of HRMS and Payroll processes, excellent communication skills, and ability to create positive team dynamics all contribute to his ability to ensure effective project results. Daniel has led numerous implementation projects for PeopleSoft Human Resources, Base Benefits, Payroll and Time & Labor modules. He has performed in-depth requirements gathering and analysis, Fit/Gap analyses and modeling sessions to develop, test and implement analysis approach. He has designed and implemented system modifications to meet specific client needs and re-engineered business practices to complement delivered system functionality. He has also created in-depth user and system maintenance training curriculum and manuals specific to the client's business requirements and needs.

Professional Summary

CLIENT	ROLE	PROJECT TYPE	DATES
University of Texas	Functional Lead	Payroll/HCM Implementation	Jul 2012- Present
University of Missouri	Functional Lead	Commitment Accounting Implementation	Mar 2012- Jun 2012
Butler University	Functional lead	Time & Labor/Absence Management	Jan 2012- Mar 2012
Sheridan Institute of Technology and Advanced Learning	Systems Analyst	Time & Labor/Absence Management	Dec 2011- Dec 2011
Brigham Young University	Functional Lead	Time & Labor Implementation	Jun 2011- Dec 2011
Kamehameha Schools	Functional Lead	HCM Implementation	Apr 2011-Aug 2011
University of Delaware	Functional Lead	HCM Upgrade	Jan 2011- May 2011
University of Texas/Dallas	Functional Lead	HCM Implementation	Jan 2010- Apr 2011
King County	Functional Lead	HCM Implementation	Jun 2009- Dec 2009
City and County of San Francisco	Functional Lead	HCM Upgrade	May 2009- Jun 2009
CIBER, Inc.	Functional Lead	HCM Upgrade	May2009-May 2009
Azusa Pacific University	Functional Lead	Time & Labor	Sep 2008-May

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Name: Daniel L.

Role: Functional Consultant – Time & Labor

CLIENT	ROLE	PROJECT TYPE	DATES
		Implementation	2009
University of Wisconsin System	Functional Lead	HCM Implementation	Mar 2008- Oct 2008
Towson University	Functional Lead	HCM Upgrade	Jan 2008- Oct 2008
Capella University	Functional Lead	HCM Changes for Financials	Jan 2007- Oct 2007
University of Maryland University College	Functional Lead	Payroll Implementation	Jan 2003- Dec 2006
Cerritos College	Functional Lead	Pre-Implementation Analysis for Payroll	Mar 2003- Apr 2003
Towson University	Functional Lead	HCM Implementation	Jun 2001- Jan 2003
Salisbury University	Functional/Technical Lead	Payroll Modifications	Oct 2002- Jan 2003
University of Delaware	Functional Analyst	Benefits	May2002-May 2002
Northern Illinois University	Functional Lead	HCM Implementation	May 2000- Jun 2001
State of Indiana	Functional Lead	HCM Implementation	May1998-May 2000
Anthem, Inc.	Functional Lead	HCM Implementation	Mar 2000-Mar 2000
Kohl's Department Stores	Functional Lead	Pre-Implementation Analysis	Feb 1998- Apr 1998

PeopleSoft Application Expertise

- Base Benefits
- Human Resources
- Time and Labor
- Position Management
- Advising (Campus Solutions)
- Oracle SQL Plus
- Benefits Administration
- Payroll
- Recruit Workforce
- Class Scheduling (Campus Solutions)
- PeopleTools
- Query Analyzer
- Absence Management
- Payroll Interface
- Commitment Accounting
- Committees (Campus Solutions)
- Application Designer
- SQL Developer

Professional Details

University of Texas

Role: Functional Lead – Payroll Implementation

- Daniel was engaged on an implementation of version 9.1 Payroll for seven University of Texas Campuses – Arlington, El Paso, Brownsville, Permian Basin, San Antonio, Tyler and Systems. Daniel joined a project that had been 2 years in progress. He had to partner with the Users at each of the different Schools in a situation where the Users were located at remote sites and not available on a face-to-face basis. He quickly assessed the current set up and made changes to accommodate functionality for Garnishments, Non-Resident Aliens, FLSA processing and Vendor AP Voucher processing. In addition, he worked with the Time and Labor and Absence Management leads to set up Earnings Codes needed for the integration and flow of data from those modules to Payroll. Daniel reviewed all

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payroll interfaces and rewrote the requirements to accommodate the changes in set up. Daniel assessed requirements and wrote detailed Functional Specifications for all customizations including: Complex process to assess and set Job FICA Exemption status based on student classifications, Complex process to automatically adjust Balance records and setup FICA refunds for FICA Exemption set post-payroll confirmation, Automatic process to setup Summer Benefits Override for qualified 9 month faculty with pre-paid Benefits, Complex Processing and Page to manage the Interface requirements and subsequent reporting for contributions to the Teacher's Retirement System. Daniel worked closely with the Conversion team and developed a conversion methodology for converting Contract Pay in the planned mid-academic year conversion. In addition, he developed a method for importing balances for the new break-off Company, Systems, and allowed them to use/manage the balances from the employee's former affiliate.

University of Missouri

Role: Functional Lead – Commitment Accounting Implementation

- Daniel was the sole consultant engaged to implement the Commitment Accounting module, version 9.1. The University of Missouri was using a bolt-on customization in the Finance Module to reassign funding to payroll entries prior to booking them. This caused a disparity between the funding in the pay lines in the HCM database and the booked entries in Finance. The University wanted to have the funding lines in HCM be the mirror of the entries booked in Finance, and eliminate the bolt-on customization that was being used in the Finance database for this purpose. For this reason, Daniel analyzed and provided a full assessment of the client needs, set up a working model and documented the additional customizations that would be necessary to provide client functionality not available in the delivered product. Daniel's assessment found historical manual manipulation of the Combo Codes and the supporting Chartfields resulting in reuse of Codes. Therefore, in addition to a full assessment of the Commit Accounting implementation, Daniel developed, tested and provided detailed documentation of a process to fix the supporting Chartfield, Combo Code and Account Code tables to eliminate duplicate usage.

Butler University

Role: Functional Lead – Time and Labor/Absence Management

- Daniel's primary assignment at Butler was to manage the set-up of the Approval Workflow in Time and Labor in version 9. To allow Butler to continue to utilize the Dynamic Group approval basis that had been established and used in prior versions. Daniel performed the reconfiguration earlier than scheduled and provided full documentation on the changes necessary to implement. Daniel was retained to assist with several other issues including: Resolving several recurring Time and Labor errors, Wrote, tested and implemented a new complex T&L Rule for Hours worked on a Holiday, Resolved several recurring Absence Management errors, Resolved issues with POI's and Set up, demonstrated and documented Template Based Hires based on client requirements.

Sheridan Institute of Technology and Advanced Learning

Role: Systems Analyst – Time and Labor/Absence Management

- Sheridan requested a functional HR resource with strong knowledge/experience in HRMS version 9.0, in particular the Time and Labor module and it's functionality with payroll. It was a short-term assignment to review the setup and usage of Time and Labor, identify areas for improvement and future direction. This also included an assessment of future utilization of the Absence Management module. Daniel was able to make several changes

to the Time and Labor set up that greatly reduced processing time and alleviated many of the recurring error messages that were being generated. In addition he developed and wrote several new Rules that eliminated manual Payroll entry, improved efficiencies and reduced error situations. In addition, Daniel provided insight to the changes expected in their upgrade to Version 9.1, especially in the Approval workflow and how they would be able to maintain their current approval system in the new Version. Daniel provided complete documentation for each specific issue, problem and enhancement that was discussed, analyzed, developed and tested.

Brigham Young University

Role: Functional Lead – Time and Labor Implementation

- Daniel was the sole consultant who assisted the BYU Team in implementing the Time & Labor module in their PeopleSoft Version 9.1 database. Although BYU has been on PeopleSoft for many years, they had decided to implement the Time & Labor module as a replacement to their Kronos time clocks and customized interface to Payroll. Daniel work with the BYU team to review their requirements, build a Project Plan and establish the configuration that would best record and process time for the over 14,000 jobs enrolled in the T&L module. Daniel worked directly with the BYU team to facilitate knowledge transfer. He also wrote all functional specifications for customizations necessary to preserve BYU functionality not met by the delivered components.

Kamehameha Schools

Role: Functional Lead – HCM Implementation

- Daniel represented the HCM component in an analysis of the Common Data Elements between the three major Oracle/PeopleSoft databases, HCM, Financials and Campus Solutions. In additional to establishing data standards and modeling how these elements are used in the HCM database; Daniel assisted Kamehameha Team members in establishing the scope of their HCM implementation, defining the resources needed and building an initial Project Plan to define the project elements and timeline. The analysis of HCM included the following Version 9.1 modules: Human Resources, Base Benefits, Benefits Administration, Payroll, Payroll Interface, Talent Acquisition Manager and Candidate Gateway.

University of Delaware

Role: Functional Lead – HCM Upgrade

- Daniel was one of a team of consultants who assisted in the University's upgrade from PeopleSoft version 8.9 to version 9.1.Daniel's primary focus was in the implementation of the Commitment Accounting module to replace a customized method of funding assignment based on a Financials modification. Daniel assisted the University of Delaware team in analyzing their financial structure and building the Commitment Accounting module to allow them to fully fund their payroll using the HCM module rather than through customizations in the Financials database.

University of Texas, Dallas

Role: Functional Lead – HCM Implementation

- Daniel was the Lead Consultant for the implementation of PeopleSoft Version 9.1 HCM. The modules implemented included HR, Benefits Administration, Payroll, Time & Labor and Absence Management. Daniel led the initial Fit/Gap sessions for the HR, Base Benefits, Payroll and Time & Labor modules. He was directly responsible for the implementation of HR, Payroll and Time & Labor. Additionally, he oversaw two additional consultants for the implementation of Benefits Administration and Absence

Management. In addition, Daniel managed the Project Plan and all deliverables for all modules implemented.

King County

Role: Functional Lead – HCM Implementation

- Daniel was initially engaged at King County as a Position Management expert for an implementation of PS Version 9.0. He participated in meetings with users and stakeholders to outline their current processes related to approving and establishing positions, present the functionality available in PS, and develop the methodology for how their business would continue after implementation. King County wanted to maintain their approval process for positions within the PS database. Daniel worked with Users to define the requirements and develop an elaborate approval process to pre-approve positions and related changes prior to entering them in the Position Management module. The result was four extensive custom bolt-on processes covering new positions, position changes, special duty assignments and employee position reclassification requests. Each process included a multi-step approval process using workflow routings and the ability for an approver to delegate their authority to another user. Daniel worked with users, provided proposals, designed the modifications, wrote the detailed Functional Specifications and worked with the technicians to ensure customer satisfaction.

City and County of San Francisco

Role: Functional Lead – HCM Upgrade

- Daniel was one of four consultants who performed an analysis for an upgrade effort from PS Version 7.5 to PS Version 9.0. Previous Fit/Gap sessions had produced a vast list of new customizations and enhancements required in addition to carrying over previous modifications made in version 7.5. The challenge was to develop alternative methods of using the delivered functionality in the new 9.0 environment to eliminate the previous version 7.5 customizations as well as reduce the new list of enhancements. The focus was primarily on the HR Module with an emphasis on prior customizations made in Position Management. The effort was successful in producing a significant decrease in the original customization scope by developing innovative ways of using the delivered functionality in version 9.0 to achieve the desired results.

Azusa Pacific University

Role: Functional Lead – Time and Labor Implementation

- Daniel was the lead consultant for the implementation of the Time and Labor module (PS HCM Version 9.0). Daniel needed to build the table structure and required functionality based on the Fit/Gap analysis conducted prior to his arrival. He quickly gained the confidence of the University's implementation team to fine tune the requirements and work directly with them to build the necessary structure. He continued to work with the University's team throughout the User and Acceptance testing and to provide direct training as well as additional training materials for employees and Managers.
- The implementation included interfacing with a Time Clock Device (TCD) and the creation of a custom interface for transmitting Time and Labor data to the University's third-party payroll company. Daniel designed, tested and implemented the custom interface to extract data from Time and Labor, Human Resources and Additional Pay for submission to the third-party payroll company based on that company's file requirements. This was needed in order to properly pay the University's hourly Time Reporters and to submit leave occurrences and additional pay items for all employees to the third-party payer.

- Daniel also assisted with the implementation of the Human Resource module. This included the refinement of setup tables and data validation for the conversion of the legacy data into PeopleSoft.
- Daniel also provided support in the building and testing the Payroll Interface module for the submission of HR data to the third-party payer.

University of Wisconsin System

Role: Functional Lead – HCM Implementation

- Daniel was one of three CIBER consultants who led an intensive Fit/Gap analysis for the implementation of several PeopleSoft Human Capital Management modules (Version 9.0). Daniel was the primary consultant responsible to conduct the analysis for Human Resources, Position Management, Salary Planning, Time & Labor, Absence Management and Commitment Accounting. Daniel also assisted and supported the sessions conducted for Recruiting Solutions, Benefits Administration, Payroll for North America and Tenure Tracking. The Fit/Gap analysis, itself, took many months to complete. Following the Fit/Gap Analysis, Daniel participated in an "Intersession" exercise in which the consultants worked directly with the University implementation team members to build a working model for many of the modules that were covered in the Fit/Gap analysis. For this exercise, Daniel led the construction of the Human Resources, Position Management, Absence Management and Commitment Accounting modules. He also assisted with the construction of the Benefits Administration and Payroll for North America modules. The "Intersession" exercise consisted of building the system delivered tables with data relevant to the Universities requirements and to successfully run the delivered processing associated with each module included in the exercise. Participation in the "Intersession" exercise not only required an extensive knowledge of the PeopleSoft Human Capital Management functionality, but also required that Daniel build strong and effective relationships with the University team members to complete the exercise successfully.
- Daniel worked with an additional CIBER consultant to conduct Fit/Gap sessions for the PeopleSoft Financials module. In this capacity, Daniel was responsible for demonstrating the delivered functionality in the Commitment Accounting module and its relevance to the data submitted via the delivered Interface into the Financials module. After the initial Fit/Gap sessions, Daniel continued to meet with the University's Financial representatives to discuss their requirements and how to best utilize the delivered functionality in PeopleSoft.

Towson University

Role: Functional Lead – HCM Upgrade

- Towson University requested Daniel return for their upgrade from PS Version 8.0 to PS Version 9.0. Daniel was the lead when Towson initially implemented PS on version 8.0 and was the developer for all of their current customizations. Daniel worked extensively with the Payroll and HR departments to test new functionality in PS version 9.0 and ensure that the new features would fit Towson's needs. Daniel worked extensively to validate records, data and functionality in each test conversion for all HRMS modules and to validate the final conversion for Production. Daniel also assisted in re-engineering and testing the current customizations to meet all new record structures in version 9.0 and refine many of the earlier processes that had been implemented. He also worked with the Financials conversion team on the July 2008 implementation of the PS Financial system for all areas where the Financials product impacts HR, Payroll and Commit Accounting.

Capella University

Role: Functional Lead – HCM Changes for Financials

- Capella implemented a change to their HCM database to retrofit their SetID and Business Unit structure to fit their Finance model. The impact to the HCM database was a change to SetID and a consolidation of six Business Units into one new business Unit. Daniel performed an impact analysis of all Records and Modules in the HCM database, wrote the accompanying code, and fully modeled and tested the change. In conjunction with this implementation, Capella changed their GL Interface funding from a Departmental structure to one fully based on Position Number. Daniel assisted with mapping the conversion and testing and verifying the new structure. Capella also engaged Daniel to review their current Faculty Pay structure and provide recommendations for remodeling it to better align with PS HCM delivered Salary components, to better fit their implementation of the PS Student Administration module and to allow them to effect payments to faculty based on staffing in the SA module. While at Capella, Daniel also provided assistance to their HR and Finance Business Units by resolving Production problems, and providing instruction on Payroll and Position Management.
- Daniel returned to Capella by their request to develop an extensive customization to allow the University to pay Adjunct Faculty for Class Assignments, Committee Assignments, Advising Relationship, Course Development and Additional pay items in which they were staffed. This customization was required as Capella was implementing the PS Student Administration module and needed to move all of their extensive faculty payment processes out of their legacy systems and into PS. Daniel worked extensively with the SA implementation team, Accounts Payable and Capella's technical staff in order to assess their needs and develop a system of Components, Tables and Records that would not only bring all of their processing into PS, but also simplify much of the manual calculations and verification that were historically done using excel spreadsheets. The customization included development of a process to automatically calculate Accrual entries for both Adjunct and Collegiate faculty members in order to book Accruals for each Term and relieve those Accruals by the subsequent payments effected to the Faculty members.

University of Maryland University College

Role: Functional Lead – Payroll Implementation

- Daniel was the team lead for the implementation of Payroll and Commitment Accounting. This implementation included U.S. Payroll and incorporated overseas Payroll from Europe and Asia into NA PS Payroll. He developed, tested, and implemented a custom Payroll interface between the University and State Payroll systems and assisted in re-conversion of the current Payroll system data for implementation of PS Payroll. He implemented Payroll separately for the overseas divisions, adapting the PS NA Payroll system to meet the clients' needs. This adaptation included several custom processes to execute in-house programs and designing a modification to allow for processing W2 Forms by Business Unit in lieu of by Company. Daniel developed and implemented several additional modifications including class payments and contracts to Adjunct Faculty which combined data from PS Student Records and Human Capital Management and included an upload of one-time payments to Additional Pay. He also developed and implemented an online timesheet for Exempt and Non-Exempt employees including online approvals and upload to pay sheets. He assisted in the development and implementation of HR Self Service and re-engineered business designs to fit PeopleSoft delivered processing and conducted and assisted in User Acceptance testing and Payroll Parallel testing.

Cerritos College

Role: Functional Lead – Pre-Implementation Analysis for Payroll

- Daniel conducted a Fit/Gap analysis for the implementation of PeopleSoft Payroll. He also provided advice for the setup of Payroll tables and guidance for the setup and execution of a modification to Leave Accrual plans.

Towson University

Role: Functional Lead – HCM Implementation

- Daniel led the functional team in the implementation of HR and Payroll, including partial Position Management, Base Benefits, Payroll, Commitment Accounting and Recruiting. He conducted Fit/Gap sessions and identified necessary modifications and best practices. He developed and implemented a custom Payroll interface between the University and State Payroll systems, developed several modifications to handle specific Leave Accrual programs and apply FTE to accruals, built an interface between in-house time sheets and Time & Labor and developed auto enrollment of employees into Deductions based on the State payroll file. He re-engineered business designs to fit PeopleSoft delivered processing and conducted and assisted in User Acceptance testing and Payroll Parallel testing. Daniel also created new pages for Job and Position Management to accommodate client requirements not provided by delivered software.

Salisbury University

Role: Functional/Technical Lead – Payroll Modifications

- At Salisbury, Daniel developed, tested, and implemented a custom Payroll interface between the University and the State Payroll systems, developed several modifications to handle specific Leave Accrual programs and apply FTE to accruals and a modification to Primary Paygroups and multiple paychecks in a single check environment. He also conducted a review of table setup and provided a design to ease implementation of Benefits and Payroll. Daniel developed a modification to change the existing Department structure in the production Database and bring all Department Ids in line with the structure required by the Finance Department. He also developed a modification for the creation of the initial Commit Accounting Tables for all active Appointments and Positions at the beginning of the Fiscal year.

University of Delaware

Role: Functional Analyst – Benefits

- Daniel analyzed the previous installation of PeopleSoft delivered 403(b) processing in Base Benefits and resolved existing processing problems. He designed a workaround for 403(b) processing for first year implementation.

Northern Illinois University

Role: Functional Lead – HCM Implementation

- Daniel led the implementation of HR, Base Benefits and Payroll, including Benefits Billing, Budget/Encumbrance and G/L Interface (PS Financials 7.0, 7.5) and was responsible for managing and directing the work of other CIBER team members. He designed, tested and implemented a modification of Retirement (SURS) base calculation to allow inclusion of system computed Imputed Income, a modification to Leave Accrual processing to allow adjustment for FTE, a modification to Benefits Billing to allow acceptance of General Deductions and a workaround/modification for processing 403(b) deductions and limit assessments. He presented PS delivered processes, including 403(b) processes, as part of the Fit/Gap assessment and facilitated the re-engineering of many of the client's business processes to fit PeopleSoft delivered functionality. He also

conducted conversion validation, researched and corrected errors, and developed and executed User Acceptance testing.

State of Indiana

Role: Functional Lead – HCM Implementation

- Daniel led conversion and implementation efforts for HRMS, including Competency Management, Benefits Administration, Recruiting and Training modules. He developed, documented, tested and implemented modifications to delivered functionality. He analyzed the client's reporting requirements and developed custom reports for Recruiting and Training including Training Letters and State required HR reporting. He conducted data modeling sessions for the Training & Recruiting modules and facilitated User Acceptance testing. Daniel developed a training program and trained core users on system functionality, and wrote the training manuals and business process documentation. He also developed, tested, and implemented modifications and business process for using Competency Management to track applicant/employee qualifications.

Anthem, Inc.

Role: Functional Analyst – HCM

- Daniel conducted a Fit/Gap session on the Plan Salaries module. He developed a modification for processing annual merit increases and redesigned delivered functionality to use Position hierarchy in lieu of Department ID for Salary Administration.

Kohl's Department Stores

Role: Functional Analyst – Pre-Implementation Analysis

- Daniel participated in Payroll and HRMS Fit/Gap sessions and documented all the issues and requirements resulting from those sessions. He compared the client legacy reports with PeopleSoft delivered reports and developed modeling scenarios for base line testing.

Additional Professional Experience

St. Paul Fire & Marine Insurance Company

Daniel acted as the liaison between the Payroll and IS departments for Payroll tax and regulatory processing, balancing and reporting for the upgrade of PeopleSoft to version 6.0 from version 5.0. He redesigned payment processes to benefit providers, reducing production time by 75% and eliminating errors. Daniel re-engineered the year-end balancing and reporting structures, eliminating redundant processing. He developed, tested and implemented an online Employee Self Service system. He also managed and trained employees on Payroll Tax, General Deductions and Garnishment/Levy functionality and wrote procedures manuals for new and existing processes

First Bank Systems (Currently U.S. Banks)

Daniel managed and performed all aspects of Payroll Tax and regulatory reporting. He led all year-end projects involving Payroll, Relocation, Executive Compensation and taxes. He partnered with the Corporate Tax department to jointly respond to all IRS and government audits. He performed the functions of Tax/GL lead for the ongoing Acquisition Team to convert and balance all acquisitions, mergers and divestitures, and to manage and balance all re-installs and upgrades to the Payroll system. Daniel developed and administered training programs for payroll processing, adjustment processing, tax reporting, general ledger processes and reconciliation.

Name: Daniel L.

Role: Functional Consultant – Time & Labor

Education/Certifications/Training/Presentations

Education

- **Metropolitan State University** – B.S., Accounting – St. Paul, Minnesota

Certifications

- PeopleSoft Human Resources, Base Benefits, Payroll, Benefits Administration, Year End Processing, Time & Labor, PeopleTools I & II, SQL/SQR, Delta Classes for version 8.0 (HR, Benefits, Payroll)
- Oracle OPN Certified specialist
- PeopleSoft HRMS 8 Certified Consultant

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Name: Conrad S.

Position: Technical Consultant - HCM

Overview

- Over 15 years of PeopleSoft Financials and Human Resource technical experience.
- Solid skills in SQL, SQR, PeopleTools, Application Engine, App packaging PeopleCode, and relational database concepts. Experience with PeopleTools 8.50, 8.51 and 8.52.
- A key team member in the implementation and upgrade of Human Resources and Finance modules at California State University campuses.
- Technical understanding of Finance and HCM integration points.
- Worked 8 years in an Accounting environment including a local CPA firm.
- Worked 6 years as a Business Analyst in the Banking/Finance Industry.
- Worked 4 years as a Systems Analyst in the Department of Defense industry.

Professional Summary

CLIENT	ROLE	PROJECT TYPE	DATE
The University Of Kansas	Technical Lead	HCM 9.1 / Commitment Accounting	Present
The Apollo Group - University of Phoenix	Support Lead	HCM 9.0 Production	Nov/2012
University of Arizona	HCM/CS 9.0 Security Consultant	Campus Solutions 9.0 HCM 9.0	Nov/2010
Humboldt State University	Technical and Functional Consultant	Financials 9.0 / HCM 8.9	Dec/2009
California State University, San Bernardino	Technical Consultant	Financials 9.0 / HCM 8.9	Jul/2008
California State University, Bakersfield	Technical Consultant	HCM 8.9	May/2008
California State University, Fullerton	Technical Consultant	HCM 8.9 / Commitment Accounting 8.9	Dec/2007
California State University, Dominguez Hills	Technical Consultant	HCM 8.4	Jun/2006
California State University, Monterey Bay	Technical Consultant / Commitment Accounting Consultant	Financials 8.4	Dec/2005
California State University, Bakersfield	Technical Consultant / Commitment Accounting Consultant	Financials 8.4 / Commitment Accounting 8.0	May/2005
California State University, Northridge	Technical Consultant	Financials 8.4	Mar/2004
Sonoma State University	Technical Consultant	Human Resources 8.0	Feb/2003
California State University, East Bay	Technical Consultant	Financials 7.5	Dec/2001
Great Western Malting	Technical Consultant	Financials	Dec/2000
California State University, Fresno	Technical Consultant	Financials 7.0	Aug/2000
Grant County Public Utilities Division	Technical Consultant	Financials 7.0	Sept/1999

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Name: Conrad S.

Position: Technical Consultant - HCM

CLIENT	ROLE	PROJECT TYPE	DATE
California State University, Fresno	Technical Consultant	Financials 6.0	Apr/1999
Lawrence Berkeley National Laboratory	Technical Consultant	Financials 6.0	Mar/1998
City of Costa Mesa, CA	Technical Consultant	Financials 5.1	Jun/1997
Toshiba, Inc.	Technical Consultant	Financials 5.1	Dec//1996
Scott and White Hospital	Technical Consultant	Financials	Aug/1996
Health South	Technical Consultant	Financials	Dec/1995

Professional Details

- Client: University of Kansas
- Project: HCM 9.1
- Role: **Senior Technical Consultant**
- Senior technical consultant to assist in the implementation of HCM 9.1. Client was previously on Version 7.6.
- Tasks included developing customizations for Commitment Accounting and Contract Pay.
- Worked closely with the user HR representative and created functional requirements documents.
- Created technical specification documents.
- Developed customized processes using Application Engine, PeopleCode and SQR.
- Debugged PeopleCode, SQR and Application Engine processes to resolve production issues

Client: The Apollo Group - University of Phoenix

Project: HCM 9.0 Production

Role: Support Lead

- Production support team lead responsible for Core HR, Payroll, Time and Labor, Absence Management, Recruiting, Enterprise Learning Management and Customer Relation Management.
- Debugged PeopleCode and Application Engine processes to resolve production issues.
- Assisted functional consultants and DBAs to stabilize the Payroll application.
- Assisted the HRIS redesign team during the development and testing phases.

Client: University of Arizona

Project: Campus Solutions 9.0

Role: HCM 9.0 Security Consultant

- Performed functional and technical tasks to administer PeopleSoft security at the "role" and "row" Level.
- Created security related analytical reports and queries to support the University management.
- Developed Application Engine processes to maintain Campus Solutions and HCM security.
- Created detail functional and technical documentation for the Security Administration staff.
- Trained the Security Administration staff on PeopleSoft security and their daily responsibilities.

Client: Humboldt State University

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Project: Financials 9.0/HCM 8.9
Role: Technical and Functional Consultant

- Senior technical consultant to support the upgrade from Finance 8.4 to 9.0. Tasks included retrofitting the customizations that existed in version 8.4. The customizations were mostly Application Engine, PeopleCode and SQR. Assisted the HSU technical team with migrating security.
- Retrofitted a purchasing requisition modification that originated from California State, Fullerton and added functionality to the delivered product.
- Developed a "Signature Authority" application that defined authority at the department and funding level using PeopleTools and PeopleCode.
- Designed and developed the integration of the purchasing requisition and signature authority modifications. On the requisition, the users are limited to their authority when charging department and funds.
- Responsible for the functional consulting tasks in the modifications described above.
- Converted the employees of the campus Auxiliary (Sponsored Programs) from a legacy system into PeopleSoft HCM. Assisted the technical staff in supporting the interfaces and various technical questions.

Client: California State University, San Bernardino

Project: Financials 9.0/HCM 8.9
Role: Technical Consultant

- Senior technical consultant during the implementation of Benefits Administration and the CSU Temporary Faculty module.
- Assisted in the upgrade of the Financials 9.0 upgrade. Reviewed the campus modifications for: AM, AP, AR, BI, GL and PO. Assisted in Finance data cleanup.

California State University, Bakersfield

Project: HCM 8.9
Role: Technical Consultant

- Senior technical consultant during the implementation of Benefits Administration.
- Processed the conversion of data and developed queries and reports.
- Provided go-live support and mentored the technical staff.

Client: California State University, Fullerton

Project: HCM 8.9 / Commitment Accounting 8.9
Role: Technical Consultant

- Provided technical and functional guidance for Fullerton's v8.9 implementation of Commitment Accounting and Integration Broker.
- Created various ad hoc reports for end users on budgets and actual payroll expenditures. Created batch reports and online reporting using SQR, PeopleTools and PeopleCode. Most of the reporting required the combination of data from both the HR and Finance database.
- Created on-line tools to allow users to select the appropriate position number and chartfields when creating HR transactions.
- Developed a "Tenure Tracking" module using PeopleTools and PeopleCode. Performed both the functional and technical tasks and worked directly with the users.
- Worked with the Fullerton staff to document and transfer knowledge on the above modifications.

Client: California State University, Dominguez Hills

Project: HCM 8.4

Role: Technical Consultant

- Lead technical consultant to convert HCM from a legacy system. Modules included Workforce Admin, Personal Data Position Control and Commitment Accounting.
- Modified and developed conversion processes. This included the redesign of the chart of accounts and associated changes required in financial system and Commitment Accounting.
- Developed and modified interfaces to 3rd-party organizations.
- Mentored the client HCM technical staff.

Client: California State University, Monterey Bay

Project: Financials 8.4

Role: Technical Consultant/Commitment Accounting Consultant

- Lead technical consultant in the redesign of the chart of accounts and associated changes required in Finance and HCM Commitment Accounting. Was responsible for all functional tasks in the redesign of HCM Commitment Accounting.
- Developed reports using SQR.
- Assisted the HR team by customizing HCM and Time and Labor Application Engine processes.

Client: California State University, Bakersfield

Project: Financials 8.4 / Commitment Accounting 8.0

Role: Technical Consultant/ Commitment Accounting Consultant

- Lead technical consultant in the implementation of General Ledger, Accounts Payable, Purchasing, Commitment Accounting (HCM) and Integration Broker.
- Tasks included: completing data conversion, developing reports & interfaces, migrating security and providing technical debugging expertise to support testing.

Client: California State University, Northridge

Project: Financials 8.4

Role: Technical Consultant

- Technical team member that converted and customized the 8.4 Financials for the CSUN Auxiliaries.
- Modules included: GL, AP, PO, AM, AR/Billing.
- Developing a customized Grants Administration module with PeopleTools, PeopleCode and SQR.

Client: Sonoma State University

Project: Human Resources 8.0

Role: Technical Consultant

- Assisted in the HR Version 7.6 to 8.0 upgrade.
- Tasks included: Migrating California Maritime Academy's 7.5 data into Sonoma's database.
- Retrofitted SQR's to run in the 8.0 environment.
- Performed data cleanup.
- Developed security migration processes.
- Provided post-implementation technical support to Sonoma's HRIS department.
- Provided technical support for the implementation of the Time & Labor and Commitment Accounting applications.

Client: California State University, East Bay

Project: Financials 7.5

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Role: Technical Consultant

- Completed all technical tasks to implement the Baseline PeopleSoft PO, AP, and GL modules.
- Supported the Functional team during conversion and testing.
- Worked closely with and trained Hayward's technical staff to become more proficient in their PeopleSoft skill level.

Client: Great Western Malting

Project: Financials

Role: Technical Consultant

- Assisted in the development of budget reports using SQR and nVision.
- Set up the AP 1099 process.
- Performed analysis to utilize the automated foreign currency revaluation for GL, AP, and AR.

Client: California State University, Fresno

Project: Financials 7.0

Role: Technical Consultant

- Developed customized processes to interface financial data into the California State Controller and the California State University Chancellors' Office.
- Developed customized Accounts Payable Claims and Revolving Fund reconciliation processes.

Client: Grant County Public Utilities Division

Project: Financials 7.0

Role: Technical Consultant

- Provided technical and functional assistance to the client during implementation of PeopleSoft Public Sector Financials V7.0.
- Developed reports for General Ledger and Project Costing using nVision and SQR.

Client: California State University, Fresno

Project: Financials 6.0

Role: Technical Consultant

- Senior Technical Consultant of a team implementing PeopleSoft V 6.0 Public Sector General Ledger, Accounts Payable, and Purchase Order.
- Responsibilities include: Converting data from an IBM mainframe using SQR, applying fixes, customizing the applications using PeopleTools, PeopleCode, and SQR.

Client: Lawrence Berkeley National Laboratory

Project: Financials 6.0

Role: Technical Consultant

- Technical member of a team that implemented PeopleSoft V 6.0 Public Sector General Ledger and Project Costing.
- Responsible for conversion and custom processes required for month-end closing.
- Worked closely with Technical and Functional team members.

Client: City of Costa Mesa, CA

Project: Financials 5.1

Role: Technical Consultant

- Applied COBOL, SQR and PeopleCode fixes for PeopleSoft V5.1 Public Sector General Ledger and Accounts Payable for city government.

- Assisted in the System Test of General Ledger.

Client: Toshiba, Inc.

Project: Financials 5.1

Role: Technical Consultant

- Served as technical member of a team that implemented a "Model" of PeopleSoft V5.1 Financial and HR applications for a large manufacturing corporation.
- Responsible for fixes and debugging of all Financial and HR applications.
- Provided estimates for the conversion effort and any software modifications requested by the Client. These estimates were included in the document delivered to the Client.

Client: Health South (Birmingham, AL); Scott and White Hospital (Temple, TX)

Project: Financials

Role: Technical Consultant

- Involved in the implementation of PeopleSoft Asset Management and General Ledger at two client sites.
- Converted data from legacy systems using SQR.
- Developed enhancements using PeopleTools, PeopleCode and SQR.
- Worked closely with System Users on data verification and system functionality.
- Performed FIT Analysis, Functional Design, and Technical Design.

Client: Technical Consultant

Project: Conversion to SAP

Role: Steelcase, Inc.

- Participated in a conversion of DBS M:Series General Ledger (Mainframe) to SAP (R3) platform at Steelcase, Inc.

Education/Certifications/Training/Presentations

Bachelor of Science, Accounting

State University of New York, Buffalo

Name: Carol D.

Role: Technical Consultant - DBA

Overview

Ms. Dahlin has more than 14 years of PeopleSoft implementation, and upgrade experience starting with PeopleSoft 6.0 through PeopleSoft 9.2. She has worked closely with infrastructure and development teams as well as the functional teams to recommended new strategies, innovative ideas and technologies that have improved current upgrade tools and upgrade/install processes. Ms. Dahlin has played key roles in implementations and upgrades as well as ongoing PeopleSoft System Administration and user support including performance tuning and troubleshooting, Her strength lies in both PeopleSoft upgrades and system implementations. For these upgrades she directed the installation and upgrade activities, coordinated and performed patching and troubleshooting, performed delta reviews for PeopleTools, PeopleSoft Security, and PeopleSoft Infrastructure. Along with her upgrade experience she has also led several PeopleSoft implementations as well as implementing best practices and knowledge transfer. Ms. Dahlin's strong technical background allows her to assist in many capacities within implementation and upgrade projects as well as effectively manage the relationship between project managers, developers and end users.

Professional Summary

CLIENT	ROLE	PROJECT TYPE	DATE
Rose State College	Upgrade Specialist	Upgrade & Database Split	9/2011 – 3/2012
St. Paul Public Schools	Upgrade Specialist	Upgrade	1/2012 – 10/2012
Illinois Central College	Upgrade Specialist	Upgrade	5/2011 – 8/2011
University of Delaware	Upgrade Specialist	Upgrade	10/2010 – 4/2011
New Jersey City University	Project Manager	Upgrade	3/2010 – 3/2011
University of Arkansas	Upgrade Specialist	Upgrade	9/2009 – 10/2010
Alabama State University	PeopleSoft and Oracle DBA	Upgrade	9/2009 – 3/2010
Glendale Community College	Oracle and PeopleSoft Installer	Implementation	4/2009 – 6/2010
Ohio University	PeopleSoft Installer	Implementation	5/2009 – 6/2009
Bellevue University	Security Architect	Implementation	8/2009 – 11/2009
University at Buffalo	Security Architect	Implementation	10/2008 – 3/2009
California State University Los Angeles	Security Architect	Upgrade	6/2008 – 10/2008
New Jersey City University	Upgrade Specialist & Technical Lead	Upgrade	10/2007 – 6/2008
The University of Texas at Dallas	Security Architect	Implementation	6/2008 – 8/2008
The University of Texas at Tyler	Security Architect	Implementation	6/2008 – 9/2008
MiraCosta Community College District	Upgrade Specialist	Upgrade	7/2007 – 3/2009
Cerritos Community	Upgrade Specialist	Upgrade	9/2007 – 4/2008

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Name: Carol D.

Role: Technical Consultant - DBA

College			
University of Wisconsin	System Architect	Implementation	6/2007 – 8/2007
University of Houston	Security Architect	Upgrade	9/2006 – 10/2007
University of North Texas	Technical Lead	Implementation	9/2003 – 2/2004
University of Houston	System Architect/DBA	Implementation	3/2001 – 4/2002

Skill Sets

- Upgrades & Implementations
- Installations & Administration
- Project Management
- Infrastructure & Development
- PeopleSoft Technical/Functional Security
- Architecture Assessments

Technical Expertise

Operating Systems

- Microsoft Windows
- Solaris
- AIX
- UNIX
- Microsoft DOS
- Solaris
- HP-UX
- Linux
- MS Windows Server

Databases

- DB2 UDB (7 and 8)
- Informix (9 and 10)
- MSSQL Server 2000-2008
- Sybase (12.5)
- Oracle (8i through 11g)

Languages

- SQL
- COBOL
- Cshell/Born Shell

Other Software, Tools and Utilities

- Crystal Reports
- TOAD
- SQL Plus
- Oracle Enterprise Manager
- Tuxedo
- Microsoft Word
- Microsoft Access
- Microsoft Query Analyzer
- Ascential DataStage
- SQR
- Microsoft Excel
- Microsoft Project
- SQL Developer
- PeopleSoft Peopletools
- WebLogic

Professional Details

St. Paul Public Schools

Role: Upgrade Specialist

- Performed a remote upgrade of PeopleSoft HRMS 8.8 SP1 to 9.1. The environment was Oracle/Linux. Performed initial passes, test moves, and go-live for the upgrade, patches and provided technical troubleshooting services.

Rose State College

Role: Upgrade Specialist

- Upgraded PeopleSoft HRMS 8.9 to 9.1 on a Windows platform. Performed initial passes, test moves, and go-live for the upgrade, patches and provided technical troubleshooting services.

Illinois Central College

Role: Upgrade Specialist

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- Upgraded PeopleSoft 8.9 HRMS to PeopleSoft 9.0 on a DB2/Linux platform. Applied PeopleTools patches and administered all of their Web Servers, Application Servers, and Process Schedulers.
- Performed Security Delta Review sessions with both Functional and Technical teams offering recommendations and strategies.

University of Delaware

- **Role:** Upgrade Specialist
- Upgraded PeopleSoft HRMS 8.9 to 9.1 on a Linux platform. Performed initial passes, test moves, and go-live for the upgrade, patches and provided technical troubleshooting services.

University of Arkansas

Role: Upgrade Specialist

- Served as the upgrader and technical lead for upgrade from PeopleSoft 8.9 Student Administration to 9.0 Campus Solutions. Installed and configured Application Servers, Web Servers, and File Servers for the upgrade, applied all PeopleTools patches, regulatory updates, and other required updates to PeopleSoft environments.
- Reconfigured default Oracle parameters to optimize database performance, investigated conversion Application Engine failures to determine root causes in application data and wrote SQL scripts to clean up application data.

Alabama State University

Role: PeopleSoft and Oracle DBA

- Performed a migration of ALASU's Oracle databases supporting PeopleSoft 9.0 Financials, Supply Chain Management and HR/Campus Solutions and Enterprise Portal from the Windows platform to the HPUX platform during the implementation. This included the demo, development, configuration and test environments for each system.
- Upgraded these environments from PeopleTools 8.49 to 8.50, Tuxedo 9.1 to 10, WebLogic 9.0 to 10 and other related products specific to PeopleTools 8.50.

Glendale Community College

Role:; Oracle and PeopleSoft Installer and Administrator

- Performed the Oracle 11g R1 installations for GCCD non-production environments. This included using Oracle ASM as the storage structure instead of file based storage technology.
- Installed the PeopleSoft 9.0 Campus Solutions application and related required products including Tuxedo, Crystal, WebLogic, and Change Assistant.
- Performed the Oracle 11g R2 RAC installation at GCCD including Oracle ASM and GRID products to support their quality assurance environment as well as installed and configured their PeopleSoft Campus Solutions quality assurance environment.
- Worked with development teams to establish best practice procedures for development activities including the migration of code via PeopleTools and STAT.
- Worked with infrastructure teams to establish best practice procedures for the implementation and ongoing administration of the PeopleSoft systems including the web servers, application servers, process schedulers, PIA configurations, and load balancer configuration

Ohio University

Role: PeopleSoft Installer

- Performed the PeopleSoft 9.0 Campus Solutions installation services at Ohio University providing knowledge transfer as part of this service. Installed all related components such as Tuxedo, WebLogic, and Crystal.

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- Performed Security Fitgap sessions to discuss and provide best practice and security design recommendations. Provided documentation for recommended strategies and procedures.
- Provided recommendations on the initial configuration, monitoring, and tuning of the system.
- Provided off and on remote assistance to their DBA/PeopleSoft administration teams for ongoing application maintenance and troubleshooting.

Bellevue University

Role: Security Architect

- Performed a PeopleSoft application security jump start for the PeopleSoft 9.0 Campus Solutions and Customer Relationship Management systems implementation.
- Performed a mini fit/gap, prepared a detailed work plan, provided a delivered a methodology, templates, and sample permission lists and roles to assist in the implementation.
- Provided knowledge transfer and trained the security staff providing tips and techniques.

University at Buffalo

Role: Security Architect

- Performed as a functional and technical fit/gap for the PeopleSoft 9.0 Campus Solutions system and a security jump start providing a methodology, templates, sample permission lists and roles to assist in their implementation. Delivered a detailed work plan a detailed security strategy report including recommendations.

California State University Los Angeles

Role: Security Architect

- Performed a PeopleSoft system security review and assessment of CSULA's PeopleSoft 8.9 HCM and Campus Solutions system. Performed a high level risk assessment, prepared a detailed work plan, executed procedures to verify and validated CSULA security including inquiries of CSULA personnel, analytical procedures, observation of processes and duties, inspection of documents, records, and documented procedures. Provided a delivered a methodology, templates, and sample permission lists and roles to assist in their planned re-engineering of their current PeopleSoft system security. Provided a detailed review and assessment report including recommendations.

New Jersey City University

Role: Upgrader and Technical Lead

- Led the upgrade from PeopleSoft 8 SP1 Student Administration to 8.9 Campus Solutions including HR, Payroll, Admissions, Student Records, Financial Aid, and Student Financials.
- Performed a PeopleSoft Security assessment to provide a roadmap of the tasks to be performed to implement security properly in Campus Solutions, and deliver a methodology, templates, and sample permission lists and roles. Implemented the integration between Campus Solutions and Portal.
- Upgrade Specialist – Performed a remote upgrade of PeopleSoft 7.5 to 8 SP1 Student Administration. The environment was Oracle/UNIX. Coordinated upgrade patches and provided technical troubleshooting services.
- Project Manager – Performed project management and client management activities for the upgrades.

The University of Texas

Role: Security Architect

- ***University of Texas at Dallas*** - Performed a PeopleSoft application security jump start for the PeopleSoft 9.0 Campus Solutions implementation. Performed a mini fit/gap, prepared a detailed work plan, provided a delivered a methodology, templates, and sample permission lists and roles to assist in their implementation. Provided knowledge transfer and trained the security staff providing tips and techniques.
- ***University of Texas at Tyler*** - Performed a PeopleSoft application security jump start for the PeopleSoft 9.0 Campus Solutions implementation. Performed a mini fit/gap, prepared a detailed work plan, provided a delivered a methodology, templates, and sample permission lists and roles to assist in their implementation. Provided knowledge transfer and trained the security staff providing tips and techniques.

MiraCosta Community College

Role: Upgrade Specialist

- Served as the technical upgrader and PeopleSoft Oracle DBA for the upgrade from PeopleSoft 8SP1 Student Administration to 9.0 Campus Solutions including HR, Payroll, Admissions, Student Records, Financial Aid, and Student Financials; as well as PeopleTools 8.22 to 8.49 upgrade. Served as the Oracle DBA on Oracle 10g, and configured and managed the Oracle environments. Installed and configured Application Servers, Web Servers, and File Servers for the upgrade. Established backup and recovery processes, applied all PeopleTools patches, regulatory updates, and other required updates to PeopleSoft environments. Conducted a security fit/gap highlighting and recommending changes to incorporate new and changed functionalities.
- Performed the upgrade of PeopleSoft 8.4 to 9.0 Financials and Supply Chain. The environment was Oracle/Linux. Coordinated upgrade patches and provided technical troubleshooting services.

Cerritos Community College

Role: Upgrade Specialist

- Performed an onsite upgrade of PeopleSoft 8.0 to 9.0 Human Resources and Campus Solutions. The environment was Oracle/Windows. Coordinated upgrade patches and provided technical troubleshooting services.

University of Wisconsin

Role: System Architect

- University of Wisconsin Eau Claire - Performed an install of PeopleSoft 9.0 Campus Solutions. Installed and configured Oracle 10g Application Server, PeopleSoft Application and Batch Server. The environment was Oracle/Linux.
- University of Wisconsin La Crosse - Performed an install of PeopleSoft 9.0 Campus Solutions. Installed and configured Oracle 10g Application Server, PeopleSoft Application and Batch Server. The environment was Oracle/Linux.
- University of Wisconsin installations and client configurations were performed in a group presentation format with overhead projectors to provide optimum knowledge transfer and skills required to infrastructure and development teams.

University of North Texas

Role: Technical Lead

- Performed installs of PeopleSoft 8.9 products including HRMS/Campus Solutions, Financials, and Portal. Installed and configured Oracle 10g Application Server, PeopleSoft Application and Batch Server. The environment was Oracle/Linux.

- Worked with development teams to establish best practice procedures for development activities including the migration of code via PeopleTools and STAT.
- Worked with infrastructure teams to establish best practice procedures for the implementation and ongoing administration of the PeopleSoft systems including the web servers, application servers, process schedulers, PIA configurations, and load balancer configuration.

Education/Certifications/Training/Presentations

- Boise State University
  Bachelor of Business Administration, Information Systems
- Professional Oracle and PeopleSoft Training:
  PeopleTools 7.5/8.12 I and II, PeopleTools 8.1x and 8.4x Delta, 8.1x and 8.4x Application Engine, 8.4x Security, 8.1x and 8.4x Data Management Tools, PeopleTools 8.1x Database Upgrade, 8.4x Server Administration and Installation, 8.1x SQR I, 8.1x Crystal/Query
- Oracle Training: Introduction to Oracle:
  SQL and PL/SQL, Oracle Database 11g: Administration I and II, DBA Architecture and Administration, Backup and Recovery
- DB2 UDB Database Administration
- UNIX Fundamentals I and II