PROPOSAL FOR

INVITATION TO NEGOTIATE (ITN)

NUMBER 1325JCSA FOR

ERP Consulting Services for Implementation and Upgrades for PeopleSoft Applications, PeopleTools and Oracle Software and Hardware

Ms. Cali Jones

Purchasing Department
University of Central Florida
12479 Research Parkway, Bldg 600
Orlando, FL 32826
Reference: ITN# 1325JCSA

Dear Ms. Jones:

Revolution Technologies, LLC is pleased to provide this Proposal for your ITN# 1325JCSA (ERP Consulting Services for Implementation and Upgrades PeopleSoft Applications, PeopleTools and Oracle Software).

Upon close consideration, you will discover the following distinguishing qualities about Revolution Technologies:

- Founded in 2001
- Headquarters in Melborne and a servicing Branch in Orlando, FL
- Separate Oracle Higher Education Practice
- Oracle Certified Partner for Consulting
- GSA MAS vendor and registered GSA Small Business

We look forward to a continuous success and an expansion of our relationship with University of Central Florida. Please let me know if you require anything else.

Best Regards,

Antonio Court
ERP Practice Manager
407.275.7575 ext 226
acourt@RevolutionTechnologies.com

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TAB 1: EXPERIENCE & QUALIFICATIONS

1. Overview & History

Revolution Technologies, LLC (Revolution) was founded in 2001 and is headquartered along the Space Coast of Florida in Melbourne. Revolution is a nationwide staffing and solutions firm serving middle market to Fortune 1000 clients including John Deere, Nissan and McDonald's. Through both short and long term contracts, we deliver strategic staff augmentation to help clients achieve their mission-critical technology goals.

Revolution Technologies is an Oracle and SAP Certified Partner with a separate ERP Practice located in Orlando, near the University of Central Florida. Over the past decade, our Higher Education clients have included the University of Central Florida, Florida International University, Florida State University and the University of North Carolina. With more than 1000 consultants, Revolution Technologies capabilities include *expertise in PeopleSoft Campus Solutions, Human Capital Management, Financials, Customer Relationship Management, Interaction Hub, PeopleTools, Academic Advisement, Mobile Web Development, analytical tools, PeopleSoft System Administration and Database Administration.*

Revolution's owners, Ted Parker and Kent Smith, have built a new $4 million state-of-the-art headquarters along the Space Coast in Melbourne, Florida. This new 17,000 sq/ft state-of-the-art facility serves as the National Recruiting Center, or hub, for its national presence. Our delivery model is made up of senior industry leaders and experienced, dedicated recruiters who are physically located throughout our 14 branch locations in a hub and spoke model.

2. Current Clients (CONFIDENTIAL SECTION)

Our current clients in Higher Education and Public Sector include (Phone numbers withheld by request):

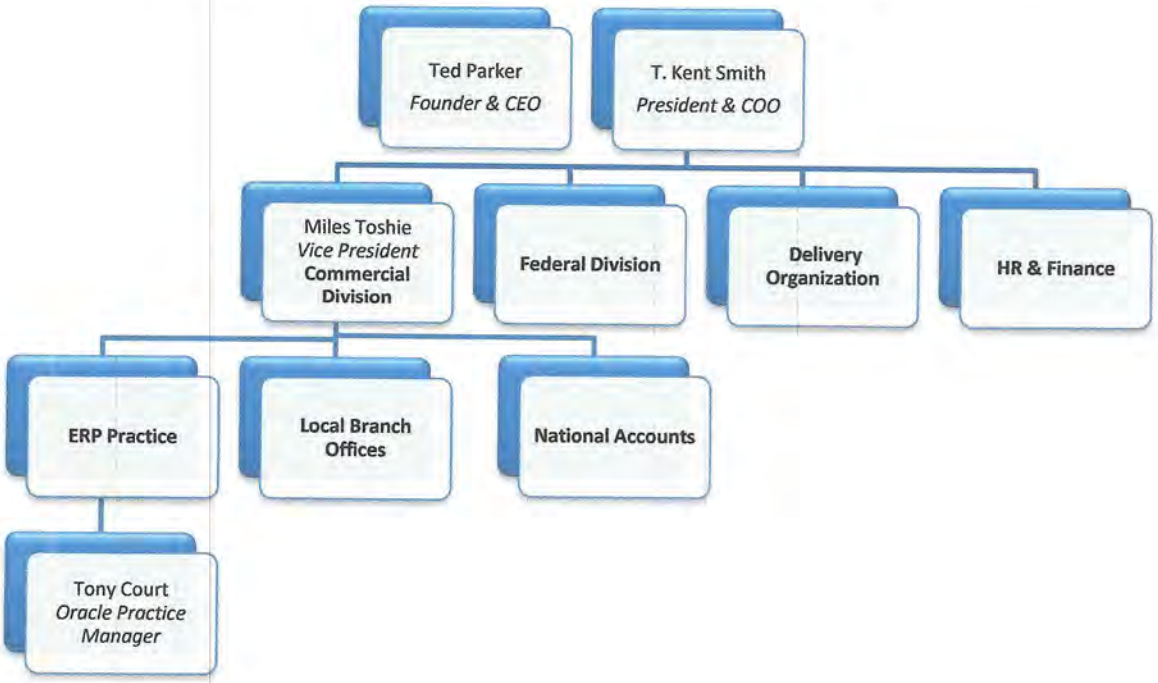
University of North Carolina (2012-Present)- Don Hepp, Sr Director, dhepp@email.unc.edu
Florida State University (2002-Present)- Michael Barrett, CIO, mgbarrett@fsu.edu
Florida International University (2014-Present): Carlos Varona, Director, varonac@fiu.edu
University of Central Florida (2013)- Jim Ennis, Director, Systems & Ops, jim.ennis@ucf.edu
Miami-Dade County Public Schools (2009-Present): Cheryl Abrams, Mgr, cabrams@dadeschools.net
Montclair State University (April 2014-Present): Elaine Tirrito, PMO Administrator, tirritoe@montclair.edu

3. Early Termination Clients

Any clients that have ended any of our engagements early generally did so because Revolution Technologies either completed the work or because of budgetary constraints.

4. Revolution Technologies Organization Chart

We are a privately held company owned by Ted Parker and Kent Smith.



5. Experience

Revolution Technologies has provided consulting services to the Higher Education Clients and Public Sector Clients since 2001 with over 13 years of total experience.

TAB 2: SERVICES OFFERED

1. With more than 1000 consultants, Revolution Technologies capabilities include expertise in PeopleSoft Campus Solutions, Human Capital Management, Financials, Customer Relationship Management, Interaction Hub, PeopleTools, Academic Advisement, Mobile Web Development, analytical tools, PeopleSoft System Administration and Database Administration. Our demonstrated core competencies include:

- *Campus Solutions Business Analysts (Financial Aid, Student Financials, Student Records, Academic Advisement, etc.)*
- *HCM, Financials, SCM, CRM & EPM Consultants*
- *Oracle eBusiness Suite Consultants*
- *Technical Consultants (PeopleTools, PeopleCode, Component Interface, Oracle Identity Manager, etc)*
- *Upgrade Specialists*
- *Training Specialists*

Please see the resumes on the following pages of several consultants on staff as well as several who may be available when needed by UCF.

2. Revolution Technologies utilizes W2 employees as well as a few carefully selected subcontracted specialists, as needed.

REVOLUTION TECHNOLOGIES

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Fax: 407-275-6310

Danny R. Kile

EDUCATION:

May 2007

University of Nebraska - Lincoln

Lincoln, Nebraska

Degree: Bachelor of Science

Major: Computer Science

Minor: Mathematics

QUALIFICATIONS:

- 4+ years of experience installing, integrating, upgrading, performance monitoring, tuning, patching and maintaining PeopleSoft 9.x applications and PeopleTools 8.49/8.50/8.51/8.52
- Strong knowledge of AIX/Linux (Unix) and Windows operating systems including basic to mid-level administration
- Advanced troubleshooting, logical thinking, problem resolution, organization, resource planning, accountability, verbal and written communication skills

EMPLOYMENT:

JULY 2012 - PRESENT

REVOLUTION TECHNOLOGIES

POSITION: PEOPLESOFT SYSTEMS ADMINISTRATOR

CLIENTS:

FLORIDA STATE UNIVERSITY – TALLAHASSEE, FLORIDA **JULY 2012 – PRESENT**

- → TRANSITION OF CAMPUS SOLUTIONS TO A NEW SET OF SERVERS AND NEW NETWORK ARCHITECTURE ACCOMPLISHED BY A COMBINATION OF VM CLONING, CONFIG FILE ADJUSTMENT, DUAL PIA STACKS AND ACCOMPANYING PS CONFIG TO ALLOW PARALLEL ACCESS UNTIL FINAL CUTOVER
- → TRANSITION OF HR, FINANCIALS, PORTAL (IH), CRM, & EPM TO A NEW NETWORK ARCHITECTURE ACCOMPLISHED BY A COMBINATION OF SERVER NIC ADJUSTMENTS, DNS CHANGES, AND FIREWALL CHANGES
- → LOAD TESTING OF STUDENT COURSE REGISTRATION SCENARIOS USING ORACLE APPLICATION TESTING SUITE UNDER VARIOUS CONFIGURATIONS
- → ANALYSIS OF LOAD TESTING PERFORMANCE RESULTS TO PROVIDE HARDWARE PURCHASE SUGGESTION
- → WEB AND APP DOMAIN PERFORMANCE TUNING AND SIZING RECOMMENDATIONS AND ADJUSTMENTS
- → PERFORMANCE MONITORING AND METRIC GATHERING SCRIPTS FOR:

  WEBLOGIC DOMAINS (JAVA HEAP USAGE, THREAD POOLS, CONNECTIONS, SESSIONS, REQUEST QUEUEING)

  TUXEDO APP DOMAINS (CLIENTS, JSH USAGE, QUEUE STATUSES, MEMORY, RECYCLING, CPU)
- → RESEARCH FOR APP DOMAIN CACHE PRELOAD AND PROLIFERATION, TOOLS AND APPLICATION LOCATION SPLIT ON FILE SYSTEMS
- → DESIGN, PROPOSAL, AND IMPLEMENTATION OF STANDALONE INTEGRATION BROKER GATEWAY AND DEDICATED APP MESSAGING DOMAIN INFRASTRUCTURE FOR ISOLATION OF ASYNCHRONOUS MESSAGE PROCESSING FROM ONLINE TRANSACTION PROCESSING

FLORIDA STATE UNIVERSITY – TALLAHASSEE, FLORIDA ...CONTINUED **JULY 2012 - PRESENT**

- → APPLICATION OF CAMPUS SOLUTIONS MAINTENANCE: CS 9.0 BUNDLE 26 & 27; HR 9.0 BUNDLE 20; PTU 12C – 12E
- → SSL CERTIFICATE UPDATE AND CONFIGURATION OF SSL OFFLOAD TO F5 BIGIP LOAD BALANCER
- → INSTITUTED 'BOOMERANG' FIX FOR RECIPROCAL PERSON DATA MESSAGING BETWEEN HR & CS
- → CONFIGURATION TIPS TO EASE FUTURE MAINTENANCE AND UPGRADES
- → UPDATES TO EXISTING UNIX SHELL SCRIPTS USED FOR PEOPLESOFT STARTUP AND SHUTDOWN AUTOMATION
- → DAY TO DAY PS ADMIN TASKS, E.G. INSTANCE REFRESHES, DMS EXECUTION, COBOL COMPILATION, SQR MIGRATION, CACHE CLEARS, ETC.
- → TRAINING OF JUNIOR AND NEW-HIRE PS ADMINS

UNIVERSITY OF NEBRASKA CENTRAL ADMINISTRATION **JANUARY 2009 – JULY 2012**

LINCOLN, NEBRASKA

POSITION: PEOPLESOFT SYSTEMS ADMINISTRATOR

RESPONSIBILITIES: INSTALL, MAINTAIN, APPLY PATCHES (BUNDLES, MAINTENANCE PACKS), PERFORM PEOPLETOOLS UPGRADES AND PATCHES, TROUBLESHOOT, INTEGRATE (PORTAL, CS, EPM). PROVIDE 24X7 ON-CALL SUPPORT.

ACHIEVEMENTS & EXPERTISE:

- → INSTALLED AND WENT THROUGH A 2 YEAR FULL-CYCLE IMPLEMENTATION OF 3 PEOPLESOFT PRODUCTS (CAMPUS SOLUTIONS, APPLICATIONS PORTAL, & EPM) FOR 4 UNIVERSITY OF NEBRASKA INSTITUTIONS AND 3 NEBRASKA STATE COLLEGES
- → DURING IMPLEMENTATION, PRESIDED OVER 56 SEPARATE INSTANCES OF PEOPLESOFT
- → EXECUTED ALL PEOPLESOFT PROJECT MIGRATIONS UNTIL DEVELOPMENT COORDINATORS WERE SELECTED AND TRAINED AND CURRENTLY EXECUTE ALL MIGRATIONS TO PRODUCTION
- → PERFORMED 2 MAJOR PEOPLETOOLS UPGRADES ON 3 PRODUCTS: 8.49 TO 8.50 ON CS, PORTAL, & EPM; 8.50 TO 8.51 ON CS & PORTAL
- → UTILIZE MULTIPLE SYSTEM MONITORING CHANNELS INCLUDING ORACLE EM, WHATSUP, WEBLOGIC CONSOLE, CUSTOMIZED SHELL SCRIPTS EXECUTING TMADMIN AND WEBLOGIC SCRIPTING TOOL COMMANDS, PEOPLESOFT PERFORMANCE MONITOR, PS PING
- → EXPERIENCE WITH INTEGRATION BROKER HANDLING PEOPLESOFT TO PEOPLESOFT MESSAGING AND EXTERNAL INTERFACES
- → WROTE SHELL SCRIPTS TO AUTOMATE TASKS SUCH AS CACHE CLEARS AND XMLP CLEANUP
- → RESEARCHED APPLICATION CODE TO WRITE DMS SCRIPTS FOR EXPORTING INSTANCE-SPECIFIC SETTINGS AND SECURITY TO BE RETAINED DURING REFRESHES
- → DESIGNED STRATEGIES FOR LOAD BALANCING AND FAILOVER OF WEB, APP, AND PROCESS SCHEDULER SERVERS
- → INSTALLED, HELPED IMPLEMENT POLICY DECISIONS, AND MAINTAIN THE PHIRE CHANGE MANAGEMENT SOFTWARE
- → MAINTAIN AND TROUBLESHOOT A PURCHASED ADMISSIONS APPLICATION RUNNING ON WEBLOGIC AND ORACLE SOASUITE

UNIVERSITY OF NEBRASKA CENTRAL ADMINISTRATION **MAY 2007 – JANUARY 2009**

LINCOLN, NEBRASKA

POSITION: PROGRAMMER / ANALYST

RESPONSIBILITIES: FULLY DEVELOP ROBUST APPLICATIONS FROM PROJECT PROPOSAL AND REQUIREMENTS GATHERING THROUGH PRODUCTION LEVEL IMPLEMENTATION, USER TRAINING, AND MAINTENANCE. RESPONSIBLE FOR A MINIMAL AMOUNT OF ON-CALL SUPPORT. I WORK ON A VARIETY OF WEB APPLICATIONS RANGING FROM UNIVERSITY-WIDE IMMUNIZATION TO COURSE EQUIVALENCY. I CONVERTED OUR WEB APPS TO PERFORM LDAP AUTHENTICATION AGAINST SUN'S IDENTITY MANAGER. I DEVELOPED A LOAD PROGRAM FOR OUR PORTFOLIO MANAGEMENT SOLUTION (PROSIGHT) CONNECTING OUR TIME ENTRY SYSTEM WITH PAYROLL AND BENEFITS DATA FROM SAP STORED IN OUR DATA WAREHOUSE TO PROVIDE PROJECT TIME AND COST ANALYSIS. I HAVE ALSO ASSISTED IN ALGORITHM DEVELOPMENT PERTAINING TO STRATEGIC PROJECT ALIGNMENT.

- → OBTAIN REQUIREMENT SPECIFICATIONS FOR NEW PROJECTS
- → DEVELOP PROGRAM AND DATABASE DESIGN
- → MAINTAIN AND UPDATE LEGACY SOFTWARE
- → DEMONSTRATIONS TO CUSTOMERS/USERS
- → 24/7 PRODUCTION ENVIRONMENT

UNIVERSITY OF NEBRASKA CENTRAL ADMINISTRATION **APRIL 2006 - MAY 2007**

LINCOLN, NEBRASKA

POSITION: PROGRAMMING ASSISTANT

RESPONSIBILITIES: ASSIST IN DESIGNING, CODING, TESTING, AND IMPLEMENTING DESKTOP AND WEB APPLICATIONS. BRING LEGACY PRODUCTION WEB APPLICATIONS INTO A .NET ENVIRONMENT. TEST FOR AND FIX BUGS IN CURRENT WEB FORMS. I PARTICIPATED ON PROJECTS INCLUDING UNIVERSITY-WIDE WEB APPLICATIONS UTILIZED BY STUDENTS AND STAFF TO APPLY FOR CROSS-CAMPUS SERVICES AND A HELP WEBSITE FOR THE ERP SOLUTION (SAP). I WAS THE PRIMARY DEVELOPER OF A HYBRID DATA WAREHOUSE AND REPORTING ENVIRONMENT USED BY STAFF TO PERFORM STUDENT REPORTING.

- → MAINTAIN AND UPDATE LEGACY SOFTWARE
- → INVOLVED IN ALL PHASES OF THE SOFTWARE LIFECYCLE
- → DEMONSTRATIONS TO CUSTOMERS/USERS
- → CODE FOR A VARIETY OF APPLICATIONS OF VARYING SIZE AND COMPLEXITY

UNIVERSITY OF NEBRASKA CENTRAL ADMINISTRATION **OCTOBER 2003- APRIL 2006**

LINCOLN, NEBRASKA

POSITION: HELPDESK SUPPORT TECHNICIAN

RESPONSIBILITIES: ANSWER QUESTIONS FROM UNIVERSITY OF NEBRASKA FACULTY AND STAFF ABOUT A BROAD RANGE OF IT TOPICS. SUPPORT PROVIDED FOR SYSTEMS INCLUDING SAP, UNIVERSITY OF NEBRASKA DATA WAREHOUSE, STUDENT INFORMATION SYSTEM, CISCO SYSTEMS VPN CLIENT, LOTUS NOTES, MS OFFICE, WINDOWS XP/VISTA, WIRELESS AND LAN NETWORKING, PALM AND OTHER MOBILE DEVICES, POLYCOM VIDEO SOLUTIONS, QMASTER PRINT QUEUE MANAGER, AS WELL AS IN-HOUSE SOLUTIONS DEVELOPED AT THE UNIVERSITY OF NEBRASKA.

- → MAINTAIN PROCEDURAL DOCUMENTATION
- → FIELD TECHNICAL IT QUESTIONS
- → HARDWARE AND SOFTWARE INSTALLATION AND SETUP
- → BLACK BOX SOFTWARE TESTING
- → VIDEO CONFERENCING SETUP AND SUPPORT
- → NETWORK TROUBLESHOOTING

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Sandeep Molleti

Professional Summary:

8 Years of IT experience in the customization, Design and implementation of the Security for PeopleSoft Financials/SCM 8.x/9.x (AP, GL, AR, AM, Contracts, Billing, OM, PO, Cash Management, Travel & Expenses, Project Costing) **and HRMS (Payroll**, ESS, MSS, Benefits, Time & Labor, Workforce Administration) and **Campus solutions (**Student Admissions, Financial Aid, Student Financials, Academic Advising, and Records & Enrollment**) applications and all PeopleSoft related suite of tools.**

- **Extensively worked as a Security Administrator for over 6 years to implement Security in various levels and create Roles, Permission Lists User Profiles, Portal Security and Definition Security.**
- **Act as a technical approver for all new Security model changes.** This would include the task of impact assessment to the current user base due to the introduction of new Roles, Permission Lists, etc.
- **Provide input for improvement to existing Security standards and procedures.**
- Extensively worked on different relational Databases like DB2, **ORACLE** 10g, and MS SQL Server.
- **Extensively worked with Reporting tools used in PeopleSoft** such as SQR, Crystal Reports and PS/Query.
- **Experience with People Tools 8.44, 8.45 and 8.49, 8.50 & 8.51.**
- **Very strong PeopleSoft 7.5, 8.0, 8.4, 8.8, 9.0, 9.1 Experience.**
- **Well experienced with PeopleSoft Internet Architecture(PIA)**
- **Experience in designing Test Cases and Strategies by following different QA methodologies.**
- Extensively worked on **interfaces** and **conversions** from legacy/third party systems to **PeopleSoft.**
- **Worked intensively with to implement Row level security**, Creating Roles and Permission Lists
- Experienced in the usage of **HP Quality Center and STAT 5.3.1 tools.**
- Excellent troubleshooting and probem solving skills.
- Team player with excellent interpersonal communication skills and technical documentation skills.

Technical Skills

- **PeopleSoft Financials (9.1, 9.0, 8.9**, 8.8, 8.4, 8.x 7.x)
- Application Designer
- Application Engine
- XML
- PS Query
- Integration Broker
- PeopleCode
- File Layout
- Tree Manager
- LDAP
- PL/SQL
- Component Interface
- SQR
- Data Mover
- Performance Tuning

Operating Systems

- Windows 2000, 2003, NT, 98, XP

Databases

- **Oracle 11g/10g/ 9i/8/7.x**
- SQL Server 2000/2005
- DB2

Applications

PeopleSoft Campus solutions/Finance and SCM / HRMS

- General Ledger
- Purchasing
- Asset Management
- Project Costing
- Student Financials
- Accounts Payable
- Billing
- Student Admissions
- Financial Aid
- Accounts Receivable
- Inventory
- Contracts
- **Payroll**

Professional Experience:

NYU – Langone Medical Center, New York City, NY **(Aug'13 - Present)**

PeopleSoft Security Consultant

Project: PeopleSoft 9.1 Tools 8.52/8.48 upgrade

Responsibilities:

- **Security design and administration for HRMS, Financials and custom PeopleSoft applications.**
- **Provided Production Support for HRMS/Financials Security related issues.**
- **Created content references and configured the security as per the requirement.**
- **Security**: Created queries to get the Navigation and the content reference for each page in Peoplesoft. Used this data to create an optimal set of permission lists for users.

- **Security**: Created queries to get the menu, component, page, navigation and content reference taking the Permission list as Input
- **Security**: Used the data from above queries to eliminate duplicate permission lists. Helped reduce the number of permission lists used by more than 40%.
- Ran portal sync to sync up the **Portal Security**
- **Security**: Assisted users with issues regarding **Portal Security**(i.e. not having access to certain navigation, etc)
- **Evaluate the overall PeopleSoft security architecture.**
- **Performed security migrations during Go live cutover and made sure everything went smoothly for and after Go live.**
- Review the Process groups (**Batch Security**) assigned to each OPRID/OPRCLASS to determine if the assignment is required for their job function.

Revolution Technologies (Loyola University of Chicago) Chicago, IL

(Apr '13 – Jul'13)

PeopleSoft Security Consultant

Project: PeopleSoft 9.1 Tools 8.53/8.51– XML/ BI Publisher, SQR and Crystal Reports

Responsibilities:

- Performed extensive security analysis for Auditing/cleaning up LUC's PeopleSoft security.
- Worked with the Functional Users in identifying the Security changes.
- Re-implemented Security for financial Modules.
- Worked on other security like Query security, Tree security, process groups, Object Security, Tools security and used these in defining the permission lists.
- Created DMS scripts to move Security into UAT, Training and production Environments.
- Involved in setting up and creating the Roles and Permission Lists and assigning them to users for the above projects.
- Performed analysis on cleaning up duplicate Roles and permission lists and creating an optimized list of roles and permission lists.
- Performed extensive security analysis for revamping PeopleSoft security.
- *Created SQL queries to get the Navigation Path for all Pages in PIA including the Underlying Menu, Component and Page name.*
- *Ran a security SQR to capture all permission list, menus, components, pages, and security authorizations that are associated to all users. Used these results to perform Security cleanup.*
- *Incorporated Field level, Row level and Operator level security using Operator Security, Security views and PeopleCode.*

KCPL – Kansas City, KS ***(Dec'12 – Mar'13)***

PeopleSoft Security Consultant

Project: PeopleSoft 8.4 to 9.1 Upgrade, Tools 8.52

Responsibilities:

- **Provide expertise in configuring PeopleSoft Security to meet functional requirements. This includes configuring role actions, roles and permission lists, row level security, and user preferences.**
- Provide expertise in using **LDAP** authentication in the **PeopleSoft** environment.
- Provide knowledge of **Security** issues around integrating **PeopleSoft** with other applications using an integration broker.
- **Ensured that Security was setup in compliance with SOX.** Met directly with auditors to ensure the system was in compliance in terms of user profiles, roles, level of data access, firewall is in place, audit tables are turned on, and computer systems are intact.
- **Provide knowledge of single sign-on in the PeopleSoft environment.**
- Migrated all projects from one environment to another to keep each database in synch.
- Create scripts via SQL Plus and Data Mover to import and export data from one environment to another.
- **Prepare documentation on Security policies and procedures.**
- Prepare **Security** Access Forms.
- **Gather all users, Security requirements base on roles, location of users, and appropriate access.**

Pigley Wigley – Charleston, SC

(Apr '12 – Dec' 12)

PeopleSoft Security Consultant

Project: PeopleSoft 8.9 to 9.1 Reimplementation Project, Tools 8.51 Implementation

Responsibilities:

- **Build Security Architect Matrix.**
- Met with Functional users, stakeholders, and users to evaluate user's roles and business processes.
- **Build Security design for approval of project sponsor.**
- Setup users in system by role, permission lists, **Security** sets, query access groups, flexible **row level security, row level security, LDAP**, Single Sign-on for **Finance and SCM**
- Create SQL and data mover scripts to migrate **Security** tables to all environments.
- **Ensure Security is in synch for all environments.**
- **Setup Security for UAT.**
- **Provide client for post go live.**
- **Design, developed and implemented PeopleSoft Security integration across application development.**

<u>QBE Insurance, Madison, WI</u>

(Oct'11 – March' 12)

PeopleSoft Security Consultant

Project: PeopleSoft 8.9 to 9.1 Upgrade, Tools 8.51 Implementation

Responsibilities:

- **Performed extensive Security analysis for cleaning up QBE's PeopleSoft Security. Worked with the Functional Users in identifying the Security changes for the Upgrade from 8.9 to 9.1.**
- **Re-implemented Security for financial Modules.** Documented all the **Security** changes made and provided Best practice recommendations based on SOX compliant **Security** standards.
- Worked with system and database administrators to achieve consensus on best practice and requirements necessary for Sarbanes-Oxley regulations.
- Worked on other **Security** like Query **Security**, Tree **Security**, process groups, Object **Security**, Tools **Security** and used these in defining the permission lists.
- Created DMS scripts to move **Security** into UAT, Training and production Environments.
- Given create Requisition access to employees on based Jobcode.
- Worked with user preference and user profile.
- **Involved in Development, test and support 24X7 to all Technical, Functional users and organization employees in Credit Suisse**
- By using STAT, Migrate the Roles, Permission list and Tree **Security**
- Involved in setting up and creating the Roles and Permission Lists and assigning them to users for the above projects. Performed analysis on cleaning up duplicate Roles and permission lists and creating an optimized list of roles and permission lists.
- **Performed extensive Security analysis for revamping Clients PeopleSoft Security.**
- Worked on other **Security** like Query **Security**, Tree **Security**, process groups, Object **Security**, Tools **Security** and used these in defining the permission lists.
- Created SQL queries to get the Navigation Path for all Pages in PIA including the Underlying Menu, Component and Page name.
- **Ran a Security SQR** to capture all permission list, menus, components, pages, and **Security** authorizations that are associated to all users. **Used these results to perform Security cleanup.**
- Incorporated Field level, Row level and Operator level **Security** using Operator **Security**, **Security** views and PeopleCode.
- **Involved in Redesign, Development and testing of Permission lists, users, Roles and assigned roles to users for diff Business units**
- Involved in compare analysis for the changes in **Records** and fields to fix custom Queries and Pages which are affected after the upgrade.
- Involved in the system for support and problem resolution.
- **Involved in Design, Development and Execution of Documents for test plans, test cases, and test procedures based on the business requirements for Financials and SCM to validate the User Roles.**
- **Executed test cases, documenting test results, log problems and performing regression testing.**

- Involved in **testing** of transactions like Entering Invoices, Entering Cheques, Applying Receipts, Running Remittance, Memo Amounts, Credit Information, Depreciation Methods, also **tested** by Running AR/GL and AM/GL Interfaces, Journal Import, Payment Schedules to validate **Row level security** for different users
- Involved in designing, developing and executing of the End to End **test** scripts as part of the System **testing** for the Modules AP, GL, AR, BI,PO,PC,AM,OM,AC
- Involved in **testing** to upload journals, budgets from excel spread sheet.
- Involved in **testing** of several Custom sqr's and custom queries.
- Debugged People code and modified People Code to meet business requirements after the tools upgrade
- Conducted regression **testing** on each new build, identified errors and Interacted with developers to resolve technical issues.
- Manually performed Ad-Hoc **testing**, end-to end **testing**, System **testing**, Regression **Testing**, Functional and User Acceptance **testing**
- Analyzed user requirements, attended Change Request meetings to document changes and implemented procedures to **test** changes
- Wrote documentation for the project along with screen shots and explained the operation methods and usage of screens for AP, GL, AR, BI,PO,AM,PC,AC
- Reported the daily status of **test** cases executed/failed, worked with business analysts to assure new functionality changes were reasonable regarding existing physical design.
- Involved in fixing programs and online issues during Application and System **testing**

BCBSFL, Jacksonville, FL
(Apr'11 – Sep'11)
PeopleSoft Financial Techno/Functional Security Consultant

Project: PeopleSoft Upgrade 8.8/9.0 on Tools 8.45 to 8.49

Responsibilities:

Security Administration

- **Performed extensive Security analysis for cleaning up BCBS PeopleSoft Security.**
- **Worked with the Functional Users in identifying the Security changes for the Upgrade from 8.8 to 9.0.**
- **Re-implemented Security for financial Modules.** Documented all the **Security** changes made and provided Best practice recommendations based on SOX compliant **Security** standards.
- Worked with system and database administrators to achieve consensus on best practice and requirements necessary for **Sarbanes-Oxley regulations.**
- Worked on other **Security** like Query **Security**, Tree **Security**, process groups, Object **Security**, Tools **Security** and used these in defining the permission lists.
- Created DMS scripts to move **Security** into UAT, Training and production Environments. **Security**

- Involved in setting up and creating the Roles and Permission Lists and assigning them to users for the above projects. Performed analysis on cleaning up duplicate Roles and permission lists and creating an optimized list of roles and permission lists.
- Performed extensive **Security** analysis for revamping BCBS **PeopleSoft Security**.
- Worked on other **Security** like Query **Security**, Tree **Security**, process groups, Object **Security**, Tools **Security** and used these in defining the permission lists.
- Created SQL queries to get the Navigation Path for all Pages in PIA including the Underlying Menu, Component and Page name.
- Ran a **Security** SQR to capture all permission list, menus, components, pages, and **Security** authorizations that are associated to all users. **Used these results to perform Security cleanup.**
- Incorporated Field level, Row level and Operator level **Security** using Operator **Security**, **Security** views and PeopleCode.

Environment: PeopleSoft FSCM 8.8/**9.0** People Tools 8.45/8.49 (App Designer, Application Engine, PS Query, Integration Broker), Peoplecode, MQ Series, WSDL, Crystal Reports, **Oracle** 11g. & AWE (Approval Workflow Engine)

University of Kansas, Lawrence, KS

(Apr'09 – Feb'11)

PeopleSoft Security Admin Consultant

Project: PeopleSoft Finance/Campus solutions/HR Implementation.

Involved in the Security Implementation of PeopleSoft 8.9 – Campus solutions, HR and Finance

Responsibilities:

- **Implemented Campus solutions Security for 8.9. Setup Security user profiles for 13,300 users for Campus Community, Student Recruiting, Student Admissions, Records and Enrollment, Financial Aid, Student Financials, Academic Advising**, and **Records** and **Enrollment**.
- **Assisted users with testing Security for the following modules**: Student Financial Aid, Student Records, Loan Process, Equation Engine, and Campus solutions.
- **Act as a liaison for divisions by providing functional and technical support for Campus solutions Security Related Issues**
- Assigned Add / Update / Update all / Correction access to Users on custom Pages.
- Involved in the Setup of **Row level security.**
- Developing **Data Mover** Scripts to migrate OPERATOR CLASSES, **SECURITY** Profiles to Production.
- Involved in implementing BU **Security** on Queries. Creating **Security** View Definitions and secured all the views using **Query Security** Record and the Views were used to code the queries to achieve **row level security** by BU and OPRID's.

- Created Audit files in a delimited text file that included Invoice information, User Id Information, Expenses Payments File and Vendor Info.
- Involved in the setup and **testing** of operator **Security**, object **Security**, Tree Manager and query **Security**.
- Involved in the **Security** design and administration for **Financials** and **HRMS** application.
- Involved in the design, creation and implementation of Roles, Permission List, User Profiles, Department trees and Query **Security**.
- **HRMS Security:** Created **Security** matrix for **Payroll**, Time & Labor, ESS and MSS Modules
- Customization was done to all the layers of **Security** namely Network **Security**, Operating System **Security**, Database **Security** and Application **Security**.
- Created several Operator classes and attached individual operators with or without Primary class attributes.
- Provide guidance on information **Security** best practice, initial setup of new users and new functionality.
- Established a comprehensive operator **Security** system thru **Security** definitions.
- Worked on panel's customization to provide extra detail values to the user on various panels and also worked in Menu customization to restrict user to menus using **Security** Administrator.
- Developed several SQRs, which incorporated **Security** features for operators/operator class using Query **Security** and Tree Manager.
- Extensive work in implementing **Security**, assigning menu and creating operator classes using **Security** administrator.
- Setting up of the employee data **Security** by creating **Security** Trees to grant or restrict user access to employee data.
- Responsible for the creation, **test**, migration and support of users, roles, permission lists, **Security** trees query access trees, menus and content reference.
- Also participated in performing end-user training and producing system training guides
- Developed various **Security** audit reports for Auditors
- **Did Knowledge Transfer to Perm Staff at the End of the Project Warranty Period.**

Environment: PeopleSoft FSCM/Campus solutions/HR (Campus Community, Student Recruiting, **Student Admissions, Records** and **Enrollment, Financial Aid, Student Financials, Academic Advising**, and **Records** and **Enrollment**, AR , BI, GL, AP, PO , **Payroll**, TL**) 8.9 People Tools 8.47 (App Designer, Application Engine, PS Query) People Code, Crystal Reports, Oracle 10g & Quality Center**

<u>Laureate Education, Baltimore, MD</u>- Telecommute **(June'08 – Jan'09)**

PeopleSoft Financial Techno/Functional Security Consultant

Project: PeopleSoft Enterprise Financial and Campus solutions System – Production Support and Development

Responsibilities:

- **Performed Security Assessment on current state of 8.0 environments and provided recommendations on changes that would need to be made to system for 8.9 upgrade.**
- Upgraded **Campus solutions** from v 8.0 to **8.9**. Setup **Security** user profiles for All users in Campus Community, Student Recruiting, **Student Admissions**, **Records** and **Enrollment**, **Financial Aid**, **Student Financials**, **Academic Advising**, and **Records** and **Enrollment**.
- **Campus solutions Security: Assisted with Security changes/recommendations for 11 institutions.**
- Responsible for **On Call 24x7 Support** of **Financials** and **Campus solutions** Application on a rotational basis biweekly
- **Designed and Developed interfaces and conversions for Account payables & Account Receivables using file layout, Application engine and crystal reports.**
- Supported day to day activates and issues related to AM, Project Costing, Purchasing, AR, BI & INV modules.
- Providing **Production support** for the issues relating to General Ledger, Accounts Payable and Billing modules.
- Worked with end users in gathering data related to Production Issues and Documented the Resolution Steps on SharePoint for Future reference
- **Did testing using test scripts provided by the functional team in AR and BI modules in Staging and QC environment, reported technical and functional issues to the Issue Tracking team.**
- Customized several SQR and Crystal reports like Pending items, aging reports like AR30001, AR30002.
- Customized the Application Engine AP_PAYSELECT so that it picks up the vouchers only after the accounting entries have created.
- Customized **PeopleSoft** delivered Crystal reports in Accounts Payable like Closed Voucher, APY1010 Voucher Register.
- Involved in Design, development and customization of **PeopleSoft** delivered **PO Approval Workflow** process to provide multiple levels of approval based on Amounts and Purchase.

Environment: PeopleSoft Financials / Campus solutions 8.9, People Tools 8.48 , Oracle 10g & STAT 5.3.1 (Object migration Tool).

WMATA, Washington DC

(Jul'07 – Mar'08)

PeopleSoft Financial/HRMS Techno/Functional Security Consultant

Project: PeopleSoft Implementation – Security Admin/Technical Consultant

Responsibilities:

- **Worked on complete creation, maintenance and troubleshooting of PeopleSoft Security administration** in **HRMS**, **Financials** and custom **PeopleSoft** applications.
- Developed **PS application Security** for users, **row level security** for data reporting and access, as well as the continued maintenance and updating of the application **Security**.
- Developed all Functional/Technical specs, **test** plans, **test** scenarios, migration documentation for project.
- Created new roles and permission lists as per the business needs.
- Set up **Security for access** to Nvision in the **Financials** module and have worked on some Crystal report issues.

- Trained Help Desk employees on **Security** Administration – assigning the correct **PeopleSoft** modules/Roles and the other system access needed for various functionality needs as well as setting up a hierarchy for approval of access from the various members of the management team.
- Involved in development, customizing, upgrade and support of People Soft **FSCM/HRMS**.
- Performing all the required steps for setting up Billing and AR modules. Did the 3-tier debugging to track Expenses import process during the execution of EX_EE_UPDATE application engine program.
- Worked closely on both the **Department Tree** and the **Query Trees**.
- Rebuilt the "generic" users to replace the PS and VP1 delivered users for restarting the app servers, etc. to limit their access and make the **passwords** only available to the appropriate DBAs and/or Managers
- Resolved issues related to Component interface, Application messaging, Integration broker, Application Engine.
- Written Technical Design Specs for all of the Interfaces and Reports those were customized or newly developed.
- Developed **Test** Cases , **Test** Scenarios and created **Test** data and executed tests **in Quality Center 9.2**

Environment: PeopleSoft FSCM 8.8(GL, Expenses, AP ,BI ,INV ,PO , ePro),PeopleTools(8.46.08), App Designer, Peoplecode, Application Engine, Component Interface, Workflow, PS Query, SQR and Oracle 9i, Crystal 9.0

Integrys Energy, Chicago, IL **(July'06 – May'07)**

PeopleSoft Financial Techno/Functional Consultant

Project: PeopleSoft Financial System Implementation

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ADEL RIYAD

- **PeopleSoft** - 18 years
- **Payroll Configuration** - 14 years
- **PS Query** - 16 years
- **PS Version 9.1** - 1.5 years
- **PS Version 9x** - 3 years
- **Public Sector** - 1 client

Summary:

Adel has over twenty years of Information Systems experience with Human Resources and Financial systems in a wide variety of industries. He has over 15 years of professional consulting experience providing clients with project management, systems design, analysis, and contract programming services. Adel has over 18 years of experience implementing, customizing, and upgrading **PeopleSoft Payroll**, T&L, Human Resources, and Benefits systems. Adel has led projects in the implementation and upgrades of **PeopleSoft HCM** products. **He has extensive experience and knowledge in both Payroll and Time &Labor.**

Education: MS Computer Science

Fairleigh Dickinson University, Teaneck, NJ

BS Computer Science

Fairleigh Dickinson University, Teaneck, NJ

Work Experience:

Revolution Technologies (University of North Carolina) 09/2012 - Present

Payroll Consultant/Lead

- Implement **PeopleSoft Payroll 9.1**

Citizens Bank/RBS **04/2011 – 08/2012**

Payroll/T&L Functional Analyst/Lead

- Upgrade **PeopleSoft Payroll** and T&L **9.0 to 9.1**
- Production Support after 9.1 upgrade
- **Payroll** 2011 Year end

Responsibilities:

- Implementation including gathering and analysis of user/business requirements, design of Functional solutions
- Design and documentation of Business Solution and work very closely with technical team resources to complete Technical Designs
- Design of **PeopleSoft** functionality and business processes in non-technical terms for end user.
- Upgrade activities including Execution Planning, Risk Assessment and cutover planning
- Performed Performance testing of Batch Processes and On-line pages and components.
- Evaluation of Self-service modules including e-Pay
- Design **Payroll** interfaces from **PeopleSoft** system to various vendors.
- Execution of Parallel **Payroll** process
- Evaluation of **Payroll** loaders processes for data management using PSHUP
- Design and implementation of the **Payroll** processes including Direct deposit and interfacing tax and garnishment processes with ADP
- Analysis and Design of Benefits interfaces.
- Administration of change management activities and performing up skilling sessions to **HR** support services
- Perform and manage System/Integration testing
- Evaluation and testing of **PeopleSoft** Bundles & Tax Updates to the various Environments
- Analysis and work closely with technical team in Fixing Critical/Show-stopper Defects from User Acceptance Testing
- **Review of the Compare Report between 9.0 and 9.1**
- Post-upgrade support to the Application & Batch

RBS Royal Bank of Scotland **04/2009- 03/2011**

PeopleSoft Payroll Consultant

- Citizens Bank and RBS **Payroll** and T&L consolidation Project
- **Payroll** 2009 and 2010 Year end
- Production Support

Citizens Bank **10/2007 - 03/2009**

Payroll/T&L Lead Analyst

- Upgrade **PeopleSoft HCM** 8.8 to 9.0
- Implementation of **PeopleSoft** 9.0 T&L
- Production Support after upgrade
- **Payroll** 2007 and 2008 Year end

Responsibilities:

- Upgrade activities including Planning, Analysis & Conversion
- Performed fit/gap analysis for **Payroll**, Benefits upgrade to 9.0 with extensive business line interactions for multiple business entities.
- Performed extensive **Payroll** and benefits process review, recommended changes and implemented specific process changes to leverage delivered **PeopleSoft** 9.0 functionalities
- Requirement gathering including creating model questionnaire for Upgrade to 9.0
- Preparation for Upgrade including preparation of modification charts, Analysis of Entity Relationship Diagrams
- Implementation including gathering user requirements, creation of Functional specifications, design and Testing.
- Mapping the **PeopleSoft** Business Process with existing system
- Developed Prototypes in **PeopleSoft** system for Conversion
- Customization of Employee and Manager Self-Service for Time & Labor.
- Co-ordination, Planning and Execution of Parallel Testing for **Payroll**, T&L and Benefits.
- Planning and Execution of Integration Testing for **Payroll** and Time & Labor.
- Change management activities for the **PeopleSoft** system

District of Colombia Government **06/2006 - 10/2007**

PeopleSoft Payroll Implementation Consultant

- Lead a team of functional and technical resources to implement **PeopleSoft Payroll** 8.8, evaluating and testing 8.9. Review and approve all design documents and communicate status to the project senior management.
- Responsible for final review of all functional and technical specifications and a complete review of all **Payroll** configurations.
- Currently, performing production support for the DC government **Payroll** staff and making sure we have a successful **Payroll** execution on bi-weekly bases.
- Responsible for running **Payroll** training sessions to multiple DC government agencies.

Target Company, Minneapolis, MN **11/2003 - 06/2006**

PeopleSoft Payroll Functional Consultant

- **PeopleSoft HCM** 8.8 implementation for over 350,000 active employees. Conducted conference room pilot sessions (CRPs) for the **Payroll** department and Target company key clients. Leading a team of 6 **Payroll** functional analyst and 5 technical analysts through the full life cycle of the implementation. Review all **Payroll** functional specifications to make sure it's complete and ready for our offshore team. Coordinating and defining requirements between **PeopleSoft Payroll** system and Target WorkBrian Time and labor system. Presenting status and any required change requests to the client steering committee and **Payroll** key clients. Review deliverables (current business process, business solution designs, technical designs and business process documents to make sure we have consistent workable solutions. Assists Client project manager with project plan, resource allocations, and coordination of multiple tasks between our project team and other clients internal departments (financial systems, cash management, SOX Compliance team). Evaluate potential benefits to justify **PeopleSoft** 8.9 upgrade project which included a detail evaluation of new and changed functionalities.

Ocean Bank of Miami, FL **06/2003 - 11/2003**

PeopleSoft Implementation Functional Consultant

- **PeopleSoft HCM** 8.8 implementation which included **HR**, **Payroll**, Time & Labor, and Base Benefits. Mainly responsible for **HR**, **Payroll** and Time & Labor model fit gap sessions and setup of all required configuration tables. Analyzed and documented current business processes for tax balancing and reconciliation, **HR** Company/Business Unit/SetID table set up, retro pay. Identified areas of improvement to make the most efficient use of **PeopleSoft** functionality. Created business requirements documentation including options, costs, recommendations.

Lowe's Company, Mooresville, NC **02/2002 - 06/2003**

PeopleSoft Payroll Functional Consultant

- Led a process analysis and functional fit gap sessions to develop business solution designs utilizing **PeopleSoft** functionality
- Develop business solution documents to document **PeopleSoft** 8 changes and work around.
- Conduct fit gap sessions to review **PeopleSoft Payroll** functionality and how the client could use it. Performed **Payroll** table setup required to properly run **PeopleSoft Payroll** for over 145,000 employees including over 8,000 garnishments.
- Using **PeopleSoft HRMS** version 8 worked as a senior member of Lowe's functional **Payroll** implementation team, responsible for developing and executing functional **Payroll**, time and labor testing scripts.

Boeing Company, St. Louis, MO **12/2000 - 11/2001**

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James Dauglash

- *PeopleSoft* - ***20 years***
- *Campus Solutions* - ***7 years***
- *HR Development* - ***8 years***
- *FI Development* - ***8 years***
- *Admissions Development* - ***5 years***
- *Version 9x* - ***4 years***
- *PeopleCode* - ***20 years***
- *PeopleTools* - ***20 years***
- *Application Engine* - ***12 years***
- *Application Designer* - ***20 years***

Information Technology Experiences:

Mr. Dauglash has vast experience in ERP systems. *His experience spans many roles, such as Project Manager, Technical/Functional Lead and PeopleSoft Consultant with a specialization in Campus Solutions within the Higher Education space.* ***He is a dedicated and goal oriented person that needs minimal supervision. He adheres to SDLC processes and SOX compliancy when delivery quality products and solutions to his customers. He has excellent analytical skills which help him troubleshoot issues and provide solutions in a timely manner; he has been used as the primary problem solver in multiple projects.***

He has over 25 years of SQL experience and several years of IBM mainframe experience; which contribute to his expertise developing interfaces for 3rd party applications or custom interfaces. Jim has excellent *PeopleSoft* ***skills, both Functional and Technical, and also has successfully demonstrated his leadership skills.***

Over 20+ years of **PeopleSoft** experience ranging from multiple implementations, upgrades, customizations, interfaces and custom bolt on. He has also done production support. I have experience with **Campus Solutions, HRMS/Payroll (HCM), Financials and CRM.**

City University of New York, NY, NY **July 2009 to Present**

PeopleSoft Technical Consultant

PeopleSoft: HCM 9.0/Campus Solution 9.0/FSCM 9.0/CRM 9.0/ELM 9.0

- Primary functions are production support and development
- Design and develop custom process solutions as needed
- Designed and develop multiple regulatory reports including NSC reporting
- Designed and develop the Student Transfer Credits conversion and setup tables.
- Track and document production issues using CRM
- Debugged and Fixed user problems as they occur
- Debugged and Fixed client's customization
- Provides recommendations around functional design and configurations
- Conduct testing of all new delivered processes
- Conduct all Quality Assurance for new processes
- Analyze and fix SQL code for performance tuning
- Analyze and fix setup issues
- Research and analyze the business requirements
- Design, develop and test new process per Client's needs.

Capella University **January 2008 to June 2009**

PeopleSoft Technical Consultant

PeopleSoft: HCM 9.0/Campus Solution 9.0

- Coded and design program for conversion effort.
- Debugged and Fixed user problems as they occur
- Debugged and Fixed client's customization
- Created new customized processes
- Created security access for all customized processes
- Evaluated the users functional needs and created functional specs for the users
- Help debugged and fixed setup issues
- Developed Components, Pages and applied Security
- Assisted in the upgrade effort from version 8.9 to 9.0

California State University **September 2007 to November 2007**

PeopleSoft Technical Consultant

PeopleSoft: HCM/Campus Solution 9.0

- Primary function was conversion.
- Coded and design program for conversion effort.
- Debugged and Fixed SQR programs
- Debugged and Fixed App Engine programs
- Debugged and Fixed Component Interface
- Debugged and Fixed Integration Brokering
- Created new customized processes using Component, Pages and applied Security
- Assisted in clarifying and creating specs for all of the users functional needs
- Created security access for all customized processes
- Evaluated the users functional needs and created functional specs for the users
- Help Debugged and fixed setup issues

CKE **June 2006 to August 2007**

PeopleSoft Project Lead/Functional Lead/Technical Lead

PeopleSoft: HCM 9.0 (HR, PR, T&L, BA, AMS)

- Replacing 7 consultants my primary function is to convert La Salsa restaurant employees from Ceridian to **PeopleSoft**.
- Did the Fit/Gap Analysis, Data Mapping and data analyst
- Created all task list and tracked the progress of the project
- Assisted in clarifying and creating specs for all of the users functional needs
- Design and coded all programs for conversion including the employee self-service.
- Coordinated and tracked all of the users task in the conversion effort

- Analyze the source system (legacy system, Ceridian) and its functionality to be able to understand the conversion efforts needed.
- Retrieved all data from Ceridian using eSource
- Production support
- Create new custom processes per user request
- Retrofit Tax Update and batches.
- Designed, coded and implemented open enrollment processes for all of the employees, including implementing processes and interfaces to all of the new vendors
- Developed Components, Pages and applied Security
- Designed, coded and implemented a process that converts employees by business unit to be enrolled and eliminate the generation of paper checks and replace it by getting paid via debit card instead.

- Created security access for all customized processes
- Evaluated the users functional needs and created functional specs for the users
- Help Debugged and fixed setup issues

Heald College **March 2006 to February 2007**

PeopleSoft Functional/Technical Consultant

PeopleSoft: HCM 8.9/ Financials 8.9/ Campus Solution 8.9

- Primary function is production support for all of the daily Help Desk issues and production problems.
- Assisted in clarifying and creating specs for all of the users functional needs
- Debugged and Fixed COBOL code.
- Debugged and Fixed PeopleCode
- Debugged and Fixed SQR programs
- Debugged and Fixed App Engine programs
- Debugged and Fixed Component Interface
- Debugged and Fixed Integration Brokering
- Created new customized processes
- Created security access for all customized processes
- Developed Components, Pages and applied Security
- Supported AP, TR, PO, AR, BI, GL, HR, PAYROLL, T&L, BA, ELM, Absent Management and **Campus Solutions.**
- Evaluated the users functional needs and created functional specs for the users
- Help Debugged and fixed setup issues

Corinthian College **February 2006 to March 2006**

PeopleSoft Project Manager

Financial Upgrade to PeopleSoft 8.9

Credentials:

B.S. in Business Management/Computer Programming

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Jana Kruckenberg

- **PeopleSoft** - 15 years
- **PS Student Financials** - 12 years
- **PS Student Records** - Cross Functional
- **PS Financial Aid** - Cross Functional
- **PS Admissions** - Limited Cross Functional
- **Campus Community** - Limited Cross Functional

Summary:

Jana Kruckenberg is a Senior PeopleSoft Functional resource with over 15 years of PeopleSoft experience. She has a wide range of accomplishments including multiple implementations for PeopleSoft Campus Solutions and Financials. She has led multiple Campus Solution projects with hands on experience with all SF Module functions and a good working knowledge of all the Student modules. She also has extensive experience with the GL Interface, Integration Broker, Query writing, and reporting. Jana has a thorough understanding of setup tables, full life cycle business requirements and processes, reporting, and the integration of modules (both Campus and Finance). She also has a strong financial background with experience in General Ledger, Chart of Accounts setup and maintenance, Accounts Payable, reconciliations, and complex financial statement preparation. She has excellent analytical skills and her wide range of experience provides the ability to see and understand issues from a variety of different angles and develop solutions to best fit the needs of the client.

Professional Experience:

Revolution Technologies **April 2014 to Present**

PeopleSoft Student Financials Functional Lead Consultant (Florida International University)

Configuration and setup of multi-term/multi-session structure to provide guidance and recommendations on how to effectively implement and operate under these requirements. Streamlining Registrar business processes and operations.

Clarion University, Clarion, Pennsylvania **February 2013 to April 2014**

PeopleSoft Student Financials Functional Lead Consultant

- Provide post-Go Live support including troubleshooting, query writing, reconciling, and knowledge transfer to client (PeopleSoft Campus Solutions 9.0)
- Audit Item Type setup for potential problems regarding payment priorities, charge priorities, general ledger, and other processing issues, identify and correct errors
- Assist client with reconciliation of SF to Finance general ledger, identify and resolve setup issues, identify and correct historical transactions errors, create queries to identify future errors and facilitate reconciliations
- Perform thorough system testing, provide problem resolution and create corresponding documentation

Bryn Mawr College, Bryn Mawr, Pennsylvania **October 2013 to January 2014**

PeopleSoft Student Financials Functional Lead Consultant

- Act as subject matter expert and lead client for SF system configuration and testing for New Career and Program Project
- Review, update, test and document tuition calc setup for additional careers and programs including conversion of select historical data
- Troubleshoot existing tuition calc problems, provide training and knowledge transfer to client, make recommendations regarding best business practice

- Identify and document issues with the client's setup for Academic Institution, Table Set ID (SetID), Institution Set and Business Unit

Syracuse University Syracuse, New York **August 2013 to September 2013**

PeopleSoft Student Financials Functional Lead Consultant

- Assist with strategic consultation regarding solutions for implementing dynamically dated classes
- Review business processes and policies in order to identify issues and concerns for SF for implementing dynamically dating functionality
- Work with SR and FA to provide solutions and a project plan for the Dynamic Dated Class Project
- Test various tuition calc setup options and document pros and cons of each, provide recommended solutions for SF setup related to dynamic dated classes

Grant MacEwan University Edmonton, Alberta, Canada **August 2011 to November 2012**

PeopleSoft Student Financials Functional Lead Consultant

- Act as subject matter expert and lead client in system setup, configuration, and testing for PeopleSoft Campus Solutions 9.0
- Assist client in fully integrating PeopleSoft systems into their current business environment
- Provide input and recommendations on best practices, identify potential risks and impact on other processes
- Analyze business processes and provide various options to best meet their unique business needs
- Perform thorough system testing, provide problem resolution and create corresponding documentation
- Assist client with reconciliation of SF general ledger to Finance general ledger, identify and correct setup issues, create reports to facilitate reconciling
- Provide post-Go Live support including troubleshooting, query writing, reconciling, and knowledge transfer to client
- Work efficiently and effectively to meet deadlines set by the project; provide status reports to management

Central Washington University Ellensburg, Washington **January 1986 to August 2011**

Student Financials Manager/SF Functional Lead **09/98 to 08/11**

- Responsible for administering, managing and directing the Office of Student Financial Services including accounts receivable, billing, collections, cashiering for all institutional payments, processing all institutional charges including tuition calc, departmental charges through sub-system feeds, refunding, third party contracts, general ledger processing, and interface and reconciliation between PeopleSoft Campus Solution and Financials.
- Functional Lead for PeopleSoft HRSA 8.0 Implementation Project and post Go Live functional support, 8.9 and 9.0 Upgrades and ongoing Updates & Fixes including fit/gap, configuration, decision making, setup, testing, documentation and training for all SF functions (tuition calc, billing, collections, accounts receivable, refunding, Item Type Setup, etc), GL interface, integration broker, 3C's, integration broker, security requests, roles and permissions lists, query writing, reporting, 1098T Tax reporting, etc.
- Experience with full lifecycles for implementations and upgrades and good working knowledge of all Campus

Solutions modules.

- Responsible for integration of SF to Finance general ledger including GL setup on item types, reconciliation of SF to Finance GL, identify and resolve discrepancies including correcting journal entries as needed.
- Design and implement modifications and system development request, create Functional Specifications, perform testing, prepare test scripts and training documentation. Work with technical staff, other functional leads and departmental users to ensure modifications work properly; facilitate move to production environment.
- Analytical review and troubleshooting for SF Module problems/issues. Respond to questions, concerns, and needs of university departments, staff, administrators and outside entities and provide solutions.
- Responsible for Federal Perkins Loans Program including interfaces between PeopleSoft HRSA and Campus Loan Manager (CLM) and CLM to PeopleSoft Financials.

Finance/Financials Functional Lead **01/86 to 09/98**

Progressively responsible positions from entry level to Accounting Supervisor. Responsible for a variety of fiscal activities including reporting, various account reconciliations, accounts payable processing, data entry, input/output controls, journal vouchers, fixed assets, bank reconciliations, travel, complex financial statement preparation, etc.

- Functional Lead for the university financial reporting system from home grown system to Information Associates Financial Resource System (FRS) including fit/gap system testing, setup, documentation, training
- Member of functional team for implementation of FRS to PeopleSoft Financials 7.50 and subsequent upgrades through 9.0 including integration with Student Administration
- Coordinate Accounting Office policies with federal, state and institutional policies. Respond to audit reports, take corrective actions and initiate change when needed
- Prepare annual university consolidated financial statements and other adhoc management reports
- Assist with all aspects of audit work including review and analysis of fiscal records, review of procedural controls over revenues, expenditures, assets and liabilities, interview departmental staff of areas being audited, review accounting records, audit files, policy statements, state and federal requirements and other operating guidelines

Computer Skills:

Extensive knowledge and power user of PeopleSoft Campus Solutions 8.0 through 9.0, Financials 7.5 through 9.0, SunGard Campus Loan Manager (CLM), and Information Associates Student Information System (SIS) Financial Management Systems (FMS) and Loan Management System (LMS).

Highly proficient in Microsoft Excel, Word, Internet, Word Perfect, Query, Focus, and Z-Writer and good working knowledge of PowerPoint and Access.

Education and Training:

Bachelor of Science in Accounting, June 1985

Central Washington University

Ellensburg, Washington

TAB 3: CONSULTING SCOPE & COST

1. **Services**

Revolution Technologies has provided Information Technology solutions and services to Higher Education and the Public Sector since 2001. We are an Oracle Certified Partner for Consulting. Our Oracle Practice was officially formed as a business unit in 2011 and is lead by Antonio Court. To meet the future needs of the University of Central Florida, our demonstrated core competencies include:

- *Campus Solutions Business Analysts (Financial Aid, Student Financials, Student Records, Academic Advisement, etc.)*
- *HCM, Financials, SCM, CRM & EPM Consultants*
- *Oracle eBusiness Suite Consultants*
- *Technical Consultants (PeopleTools, PeopleCode, Component Interface, Oracle Identity Manager, Interaction Hub, etc)*
- *Mobile Web Developers*
- *Implementation Specialists*
- *Upgrade Specialists*
- *Training Specialists*

2. **Methodology**

Revolution Technologies conforms to the preferred methodology with which the project blueprint requires. Our consultants are skilled in implementing within multiple Higher Education/PeopleSoft environments and have acquired knowledge amongst the most successful methodologies within today's marketplace. While generally, we do not introduce the actual methodology, we are very capable of making methodology recommendations upon client request.

3. **Bill Rates**

Revolution Technologies is pleased to offer the same preferred rates we have in effect for the State of Florida Universities. These rates reflect a value pricing model and a "not to exceed" structure. All of Revolution's consultants are priced individually, according to skill set and experience level. Each of the bill rates that Revolution presents to UCF will be all inclusive of any relevant expenses and no additional charges will be added without the Universities approval.

4. **Pricing Sheet**

Please see the following Pricing Sheet

Pricing Sheet

Area of Expertise	On Site Less than 6 Months	Over 6 Months	Off Site Less than 6 months	Over 6 Months
Project Manager	$ 185	$ 185	$ 160	$ 160
Oracle/PeopleSoft Functional Consultants	$ 175	$ 175	$ 150	$ 150
Oracle/PeopleSoft Programmer\Developer Consultant	$ 160	$ 160	$ 135	$ 135
Oracle Database Administrator	$ 140	$ 140	$ 120	$ 120
Oracle Enterprise Portal Consultant	$ 175	$ 165	$ 150	$ 140
Oracle/PeopleSoft Security and/or Workflow Administrator	$ 175	$ 165	$ 150	$ 140
SQL Server Database Administrator	$ 140	$ 140	$ 120	$ 120
Testing Lead Consultant	$ 155	$ 155	$ 130	$ 130
Technical Architect \ Tuning Consultant	$ 160	$ 160	$ 135	$ 135
Mobile Developer	$ 160	$ 160	$ 135	$ 135
3rd Party Application and Web Developer	$ 130	$ 120	$ 110	$ 100
	$	$	$	$
On-demand Specialist (not listed above)	$	$	$	$

1 This list represents, but not limited to the functional Oracle/PeopleSoft areas:

Campus Solutions:

Admissions, Student Records, Student Financials, Financial Aid, Campus Community

Financials/Grants:

Accounts Payable, Accounts Receivable, Asset Management, Billing, Budgeting,
Contracts, General Ledger, Grants, Projects, Purchasing, Travel & Expense

Human Capital Management:

Absence Management, Benefits, Benefits Administrations, Payroll, Position
Management, Talent Acquisition Management, Time and Labor, ePerformance

TAB 4: PRIOR EXPERIENCE WITH A LARGE, COMPLEX, MULTI-CAMPUS HIGHER EDUCATION INSTITUTION

(CONFIDENTIAL SECTION)

1-3: Systems Administrator Projects, Database Administrator Projects, PeopleSoft Application and Tools Projects

Client Organization:	**University of Central Florida**

Description of Services:	*PeopleSoft Systems Administration:*
	a) Review the current Peoplesoft software and hardware architecture for Campus Solutions and Portal platforms and provide any knowledge about known issues with the software versions in use on the web and application server tier.
	
	b) Review the Peoplesoft Integration Gateway design improvements for the Campus Solutions, CRM, FI and Portal tiers. After the review is complete, provide any suggested actions to UCF's current plans to better handle peak volumes and improve daily processing of application messaging.
	
	c) Review the Portal and Campus Solutions application server cache management and provide any suggestions on using pre-cache file loading and what technical limitations, if any, exist with using pre-cache loading. The deliverables for this engagement would be:
	
	• Review of UCF's current Peoplesoft weblogic file cache management practice as compared to other Portal and Campus Solution customers.
	• If a change in our current file cache management is recommended, provide a plan to determine:
	  ○ Recommended test plan to measure the benefits or negative impacts when we enable file cache management.
	  ○ Research and provide links to any existing best practices for cache management from Oracle, Alliance HUEG or other resources.
	• Review of UCF's Peoplesoft weblogic memory cache management and provide any recommendations on possible changes.

Period of Performance:	2013
Technical Environment	PeopleSoft Campus Solutions 9.0, PeopleTools 8.5X, Weblogic

Client Organization:	**Loyola University, Chicago**

Description of Services:	*PeopleSoft Security Administration:* • Performed extensive security analysis for Auditing/cleaning up LUC's PeopleSoft security. • Worked with the Functional Users in identifying the Security changes. • Re-implemented Security for financial Modules. • Worked on other security like Query security, Tree security, process groups, Object Security, Tools security and used these in defining the permission lists. • Created DMS scripts to move Security into UAT, Training and production Environments. • Involved in setting up and creating the Roles and Permission Lists and assigning them to users for the above projects. • Performed analysis on cleaning up duplicate Roles and permission lists and creating an optimized list of roles and permission lists. • Performed extensive security analysis for revamping PeopleSoft security. • Created SQL queries to get the Navigation Path for all Pages in PIA including the Underlying Menu, Component and Page name. • Ran a security SQR to capture all permission list, menus, components, pages, and security authorizations that are associated to all users. Used these results to perform Security cleanup. • Incorporated Field level, Row level and Operator level security using Operator Security, Security views and PeopleCode.
Period of Performance:	April 2013-July 2013
Technical Environment	

Client Organization:	**University of North Carolina**
Description of Services:	*PeopleSoft Financials and Human Capital Management Implementation:* Revolution Technologies has been providing a full scope of management and information technology consulting services since January, 2012. These services supported all of the areas of The ConnectCarolina Project. The ConnectCarolina project is developing an integrated management system based on Oracle's PeopleSoft. This administrative system will improve the efficiency and effectiveness of business processes related to **student services, human resources, payroll** and **finance** at the University of North Carolina at Chapel Hill.
Period of Performance:	January 2012 – Present
Technical Environment	PeopleSoft CS 9.0, PeopleSoft HCM 9.1 & Finance 9.1

Client Organization:	**Florida State University**
Description of Services:	*PeopleSoft Systems Administration:* • TRANSITION OF CAMPUS SOLUTIONS TO A NEW SET OF SERVERS AND NEW NETWORK ARCHITECTURE ACCOMPLISHED BY A COMBINATION OF VM CLONING, CONFIG FILE ADJUSTMENT, DUAL PIA STACKS AND ACCOMPANYING PS CONFIG TO ALLOW PARALLEL ACCESS UNTIL FINAL CUTOVER. • TRANSITION OF HR, FINANCIALS, PORTAL (IH), CRM, & EPM TO A NEW NETWORK ARCHITECTURE ACCOMPLISHED BY A COMBINATION OF SERVER NIC ADJUSTMENTS, DNS CHANGES, AND FIREWALL CHANGES • LOAD TESTING OF STUDENT COURSE REGISTRATION SCENARIOS USING ORACLE APPLICATION TESTING SUITE UNDER VARIOUS CONFIGURATIONS • ANALYSIS OF LOAD TESTING PERFORMANCE RESULTS TO PROVIDE HARDWARE PURCHASE SUGGESTION • WEB AND APP DOMAIN PERFORMANCE TUNING AND SIZING RECOMMENDATIONS AND ADJUSTMENTS • PERFORMANCE MONITORING AND METRIC GATHERING SCRIPTS FOR: WEBLOGIC DOMAINS (JAVA HEAP USAGE, THREAD POOLS, CONNECTIONS, SESSIONS, REQUEST QUEUEING) TUXEDO APP DOMAINS (CLIENTS, JSH USAGE, QUEUE STATUSES, MEMORY, RECYCLING, CPU) • RESEARCH FOR APP DOMAIN CACHE PRELOAD AND PROLIFERATION, TOOLS AND APPLICATION LOCATION SPLIT ON FILE SYSTEMS • DESIGN, PROPOSAL, AND IMPLEMENTATION OF STANDALONE INTEGRATION BROKER GATEWAY AND DEDICATED APP MESSAGING DOMAIN INFRASTRUCTURE FOR ISOLATION OF ASYNCHRONOUS MESSAGE PROCESSING FROM ONLINE TRANSACTION PROCESSING • DAY TO DAY PS ADMIN TASKS, E.G. INSTANCE REFRESHES, DMS EXECUTION, COBOL COMPILATION, SQR MIGRATION, CACHE CLEARS, ETC.
Period of Performance:	July 2012 – April 2013
Technical Environment	PeopleSoft CS 9.0, Portal

Client Organization:	**Florida International University**
Description of Services:	*PeopleSoft Campus Solutions, Multi Term Project:* FIU is moving towards providing a six term academic year. The goal of this project is to have three sessions or terms (whichever is better suited operationally) within Fall, three within Spring and the traditional Summer term. • Provide recommendations, guidance and roadmap on how to implement this configuration within PeopleSoft Campus Solutions. **Student Records Consultant** Configuration and setup of multi-term/multi-session structure to provide guidance and recommendations on how to effectively implement and operate under these requirements. Streamline Registrar business processes and operations. **Student Financials Consultant** Configuration and setup of multi-term/multi-session structure to provide guidance and recommendations on how to effectively implement and operate under these requirements. Streamline Finance business processes and operations.
Period of Performance:	April 2014- Present
Technical Environment	PeopleSoft CS 9.0

Client Organization:	**Montclair State University**
Description of Services:	*PeopleSoft Financials and Banner Student System Implementation:* **Program/Project Manager (Banner Student System)** Responsible for the full end-to-end delivery of the Banner Student Systems Software and related technical solutions the Divisions of Student Development and Campus Life and Academic Affairs, including, but not limited to Student Services Management Systems for higher education. **Program/Project Manager (PeopleSoft Finance 9.2)** Responsible for the full end-to-end delivery of business solutions to the Finance Departments including, but not limited to FMS version 9.2.
Period of Performance:	April 2014 – Present
Technical Environment	Banner Student, PeopleSoft Finance 9.2

TAB 5: DEMONSTRATED ABILITY TO MEET REQUESTED PROJECT TIME LINES

1. **Project Timelines**

   Revolution Technologies' Oracle Practice is currently involved in projects at University of North Carolina, FIU, Florida State University and Miami Dade County. We expect to meet all client mandated deadlines and deliverables.

   Revolution Technologies handles multiple projects with our dedicated Oracle recruiting staff coupled with the additional support of our local offices.

TAB 6: ITN SIGNED ACKNOWLEDGEMENT & ADDENDUM

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: 65-1129030

VENDOR NAME: Revolution Technologies, LLC	REASON FOR NO OFFER
VENDOR MAILING ADDRESS: 11315 Corporate Blvd, Ste 29	
CITY - STATE - ZIP CODE: Orlando, FL 32817	POSTING OF PROPOSAL TABULATIONS
AREA CODE: 32817 / TELEPHONE NO.: 407.275.7575, x-226	Proposal tabulations with intended award(s) will be posted for review by interested parties at the Purchasing Department, our solicitation web page and the State of Florida's Vendor Bid System and will remain posted for a period of 72 hours. Failure to file a protest within the time prescribed in UCF Regulation 7.130(5) at http://regulations.ucf.edu/chapter7/index.html shall constitute a waiver of proceedings under that regulation.
TOLL FREE NO.	
FAX NO. 877.628.2805	

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**

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.

GENERAL CONDITIONS

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

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

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

AUTHORIZED SIGNATURE (MANUAL)

AUTHORIZED SIGNATURE (TYPED), TITLE

MILES S. TOSHIE, VICE PRESIDENT

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

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

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

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

Vendors shall submit properly certified original invoices to:

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

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

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

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

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

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

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

University of Central Florida

IMPORTANT DOCUMENT – INVITATION TO NEGOTIATE REVISION

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

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

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

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

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

PROPOSERS SIGNATURE

MILES S. TOSHIE
PRINT OR TYPE PROPOSER'S NAME

REVOLUTION TECHNOLOGIES, LLC
COMPANY NAME

MTOSHIE@REVOLUTIONTECHNOLOGIES.COM
EMAIL ADDRESS

6/2/2014
DATE

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

An Equal Opportunity and Affirmative Action Institution

TAB 7: ITN APPENDICES (I, II, III, IV)

APPENDIX I EVALUATION SCORING SHEET

NAME OF RESPONDENT COMPANY **Revolution Technologies**

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 **Non-negotiable**	X		
2.2 **Non-negotiable**	X		
2.3 **Non-negotiable**	X		
2.4	X		
2.5	X		
2.6 **Non-negotiable**	X		
2.7 Section Not Used			
2.8 **Non-negotiable**	X		
2.9	X		
2.10	X		
2.11 **Non-negotiable**	X		
2.12	X		
2.13**Non-negotiable**	X		
2.14**Non-negotiable**	X		
2.15	X		

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

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

RESPONDENT COMPANY NAME **Revolution Technologies, LLC**

AUTHORIZED SIGNATURE

TITLE **Vice President**

DATE **June 2, 2014**

APPENDIX III

CERTIFICATE OF NON-SEGREGATED FACILITIES

We, REVOLUTION TECHNOLOGIES, 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-contract or for all subcontracts during a period (i.e. quarterly, semiannually, or annually).

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

APPENDIX III

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

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

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

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

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

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

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

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

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

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

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

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

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

RESPONDENT COMPANY NAME **Revolution Technologies, LLC**

AUTHORIZED SIGNATURE _____

TITLE **Vice President**

DATE **June 2, 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: Revolution Technologies, LLC

Authorized Representative's Name: Miles S. Toshie

Authorized Representative's Signature: _____

Date: June 2, 2014