

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		ITN NO: 1325JCSA
and may not be withdrawn within _____ days after such date and time.			
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 41-2174926			
VENDOR NAME Smart ERP Solutions, Inc.		REASON FOR NO OFFER	
VENDOR MAILING ADDRESS 4683 Chabot Drive, Suite 380			
CITY - STATE - ZIP CODE Pleasanton, CA 94588			
AREA CODE 925	TELEPHONE NO. 271-0200	POSTING OF PROPOSAL TABULATIONS 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. 408-521-0918		

Government Classifications
Check all applicable

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

Doris Wong, CEO

AUTHORIZED SIGNATURE (TYPED), TITLE

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

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

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

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

Vendors shall submit properly certified original invoices to:

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

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

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

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

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

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

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

SMART ERP SOLUTIONS, INC.
4683 Chabot Drive - Suite 380
Pleasanton, CA-94588



June 2, 2014

Cali Jones
Purchasing Department
University of Central Florida
12479 Research Parkway
Orlando, FL 32826

RE: Proposal in Response to ITN for ERP Consulting Services for Implementation and Upgrades for PeopleSoft Applications, PeopleTools and Oracle Software and Hardware

Dear Cali Jones,

Smart ERP Solutions, Inc. ("SmartERP") is pleased to submit this proposal to University of Central Florida for providing ERP consulting services for Implementation and Upgrades for PeopleSoft Applications, PeopleTools and Oracle Software. SmartERP is proposing to offer the University, unparalleled PeopleSoft expertise, experience and best practices when providing the services as requested. Our team of solution architects and consultants will provide the University with the highest level of quality resources available. Our team, comprised primarily of former Oracle/PeopleSoft employees, has demonstrated expertise in PeopleSoft technologies, all PeopleSoft processes including software implementation, maintenance and upgrades, application functionality, product development skills, quality analysis, and customer support.

We fully understand that this project is both critical and strategic to University of Central Florida. We understand the importance of selecting the right partner who can increase your likelihood of success – we hope you will agree that SmartERP is that partner. Every member of our team is committed to making this effort the most successful information technology initiative that the University of Central Florida has ever undertaken. We are confident that, when all issues are considered, our unparalleled commitment to your success will argue persuasively for our selection.

With an experienced staff, an approach based on a proven methodology, competitive pricing, unique add-on software solutions offered at NO COST in this proposal (see App. A), and demonstrated success in critical PeopleSoft projects, SmartERP is ready and eager to work closely with you. Our consulting philosophy and practice emphasize - teamwork, flexibility, quality, client service, and knowledge transfer. Our size and flexibility allow us to collaborate with our customers easily to execute the most creative and innovative implementation model that will work the best for your team.

Our team of experienced professionals possesses a strong background in project planning for PeopleSoft engagements, as well as the ability to draw upon the specialized experience of our PeopleSoft resources.

This team understands the issues, processes, procedures and methodologies required to successfully implement PeopleSoft solutions and take organizations through significant subsequent change.

We recognize the importance of this project and we look forward to partnering with you. We hope that after further review, you will join the numerous other clients who have chosen SmartERP as their solutions provider.

We look forward to your favorable response.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Doris Wong', with a stylized flourish at the end.

Doris Wong
Chief Executive Officer
Smart ERP Solutions, Inc.,
4683 Chabot Drive - Suite 386, Pleasanton, CA-94588
T. (925) 699-0832 | F. (408) 521-0918

UNIVERSITY OF CENTRAL FLORIDA

**ERP Consulting Services for
Implementation and Upgrade of
PeopleSoft Applications**

June 2014

SMART ERP SOLUTIONS, INC.
4683 Chabot Drive, Suite 380
Pleasanton, CA 94588, USA
Telephone: (925) 271-0200
Fax: (408) 521-0918
<http://www.smarterp.com>

PROPRIETARY NATURE OF PROPOSALS

Every SmartERP proposal is prepared for the sole and exclusive use of the party or organization to which it is addressed. Therefore, SmartERP considers certain parts of its proposals to be proprietary (as marked), and they may not be made available to anyone other than the addressee or persons within the addressee's organizations who are designated to evaluate or consider the proposal. SmartERP proposals may be made available to other persons or organizations only with the permission of the SmartERP office issuing the proposal.

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A. EXPERIENCE AND QUALIFICATIONS

1. COMPANY OVERVIEW

1.1 INTRODUCTION

SmartERP is a privately held company headquartered in Pleasanton, California. SmartERP is a leading-edge IT solutions and Services Company established with a specific mission of **providing comprehensive, world class solutions around PeopleSoft**. SmartERP brings together the best technology and domain expertise to offer full spectrum of services ranging from Implementation, Business Consulting to Support, Maintenance and Managed Operations. We also **have strong capability in Business Intelligence, Database Technology and the Fusion Platform**.

At SmartERP, we see innovation as a clear differentiator. Innovation, along with a focus on deep, long-lasting client relationships and strong domain expertise, drives every facet of our day-to-day operations. For our clients, it translates into strategic business value. Our focus and passion is to provide solutions that efficiently extend the capabilities of our clients' PeopleSoft systems to meet the needs of specific business processes. We understand that the County has invested a significant amount into business applications and we are committed to helping the County continue to reap the benefits of those investments for years to come.

At SmartERP, our primary objective is what we affectionately call "Clients for Life" – by this we mean that because we have served our clients so well, they keep coming back to us for their next need, or they may even stay with us in a Support mode. Secondly, we like to demonstrate to our clients that we are "big enough to offer quality and small enough to care". We embrace the values where customers and employees are what matter the most. While we work hard, we also have some fun along the way and strive to achieve balance between our personal lives and the way we work.

We have succeeded in delivering our services and software solutions on schedule, and within the project budget for every client we have served. SmartERP has an unparalleled, demonstrated track record of 100% success with every single project, and we pride ourselves on finding innovative ways to meet our clients' business requirements, providing cost effective solutions, shortening timelines, reducing risks, and lowering the total cost of ownership by avoiding costly customizations.

The SmartERP team brings extensive skillsets and resources to the University's project, specifically several former Oracle and PeopleSoft employees with technology skills covering many different PeopleSoft applications and 3rd party products. In addition, the University will have ongoing access to our network of best practice information and resources.

According to Service Performance Insight's "The 2013 Professional Services Maturity™ Benchmark" SmartERP Solutions is among the Top 5 in the 2013 Best-of-the-Best Professional Service Organizations.

1.1.1 EXECUTIVE OVERSIGHT

SmartERP executives bring unique advantages to our clients and their mission critical projects. As part of our commitment to ensuring our clients' success, SmartERP assigns an Executive Sponsor to each and every client. Our Executives take complete responsibility for delivering 100% success to the University and we provide this service at no cost to the client. Our Executive Sponsor, Doris Wong, will work directly with the University's executives and will participate during Executive Steering Committee meetings in order to provide insight and strategies for the project based on experience in providing oversight from both a business and technical perspective.

To highlight this experience, our CEO Doris Wong has over 25 years of technical, product development and business experience in the enterprise software industry. Prior to joining Smart ERP, Doris served as Oracle's Group Vice President and General Manager responsible for the entire PeopleSoft product line, which included Human Capital Management, Financials Management, Supply Chain Management, Customer Relationship Management, Enterprise Performance Management, and PeopleTools.

1.1.2 OUR CORE VALUES

Clients for Life - We are a client-driven and results-oriented organization. We exist to serve our customers and add exceptional value every day. We align our interests with our customers and we succeed through our client's successes.

Innovation - We believe that continuous innovation is the life-blood sustaining our existence. We create an environment where employees will be encouraged to be innovative without fear of failure and ensure that risk takers are rewarded fairly.

Integrity - We demand complete integrity at all times and in everything we do. Integrity is the most important capital we have and creates our biggest asset.

Passion - We love to compete with great passion, and we believe that passion brings out the best in people. Passion helps us translate our talents into results.

Adapt - Change is a constant in our industry. Technology is continuously changing and so are our client's priorities. We proactively work towards equipping ourselves to deal with the changing technology landscape. We respond to changing priorities and expectations in a swift and agile manner.

We create successful clients - At SmartERP, we do what many companies are afraid to do; we tell the truth. We are straight-forward about our solutions, and experience. We have built a foundation of trust with our clients, by delivering innovative solutions, exceptional service, and are proud to say that this has resulted in 100% retention and reference. We recognize that when our clients choose SmartERP, they are betting on us personally - and we would not have it any other way! For any project to be successful, we strongly feel that it is essential for clients to work with a team they can trust and rely on. At SmartERP, we pride ourselves on being committed to success.

1.1.3 HOW WE SOLVE YOUR BUSINESS CHALLENGES?

Rich User Experience

We believe in user interfaces that meet specific functional requirements and are intuitive, simple to understand, visually appealing, fast and easy to use. Our add-on solutions enhance the user experience, increasing productivity by providing greater ease of use, automating business processes, and providing simple intuitive user interfaces tailored to our client's enterprise needs.

Enhance Productivity and Paperless Processing

Business processes that are simple to understand and use enhance productivity; and the benefits of going paperless are tremendous. They include significant time savings, reduced redundant data entry, reduced errors, enhanced visibility and accountability.

Automate & Streamline Business Processes

We can help automate critical manual steps and increase productivity and accuracy, allowing the organization to do more with less. Using Smart Solutions, entire business transactions and processes can be automated and streamlined.

Security, Compliance & Approvals

Configurable application-level risk mitigation, segregation of duties, business process management – providing audit trails and secure workflow automation, the key elements of data integrity and security – to help enforce controls and assure policy compliance.

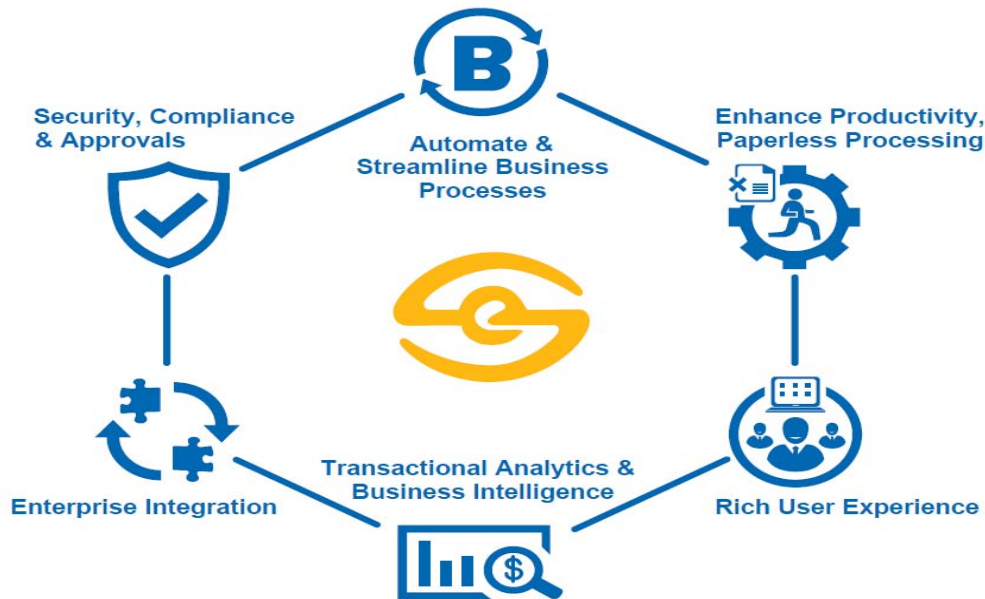
Transactional Analytics & Business Intelligence

Our analytics solutions are low cost and quick to implement. They embed directly into the client's ERP system, providing transactional analytics and embedded dashboards with built-in drill back bringing analytics where you need them, inside your ERP.

Enterprise Integration

Integrated business processes, not individual business functions, generate results. We enable clients to seamlessly integrate their people, processes, applications, and data, across an enterprise, enabling the organization to streamline its operations and support business growth.

For a Best-in-Class Enterprise



1.1.4 STRATEGIC ALLIANCES

SmartERP is alliance-rich, yet vendor-independent. SmartERP participates in many non-exclusive technology relationships with vendors such as Oracle, Microsoft, IBM and Qlikview. Through these relationships, SmartERP can acquire in-depth knowledge ahead of the market to support our clients' system integration and IT consulting needs. These relationships also provide us with unlimited access to new technologies and innovations, enabling SmartERP to successfully implement various solutions for our clients.

Strategic alliances and partnerships allow us to build integrated, best-in-class solutions that measurably enhance your business performance.

SmartERP has a well-established partner relationship with Oracle. SmartERP has been partnering with Oracle as a solutions and services provider, and is a worldwide Oracle Platinum Partner. To maintain our leadership position within the PeopleSoft applications consulting industry, SmartERP continuously and aggressively seeks client projects utilizing the latest PeopleSoft V9.2 and PeopleTools products. SmartERP has gained significant and important experience with some of the latest PeopleSoft V9.2 applications and modules, which brings additional value to your project.

Over 80% of SmartERP's business is with repeat clients, many of whom we have been working with for over five years. This indicates a high level of client satisfaction with our work. SmartERP is proud to have achieved the following designations as a Platinum level member of the Oracle Partner Network:



1.1.5 PEOPLESOFT 9.2 EARLY ADOPTER PROGRAM

SmartERP's initial interaction with Oracle's latest version of the software was even earlier than its general availability, when the organization was chosen to participate in the PeopleSoft 9.2 Early Adopter program. The initiative, which was rolled out to a select group of partners and clients prior to the general availability, gave participants a first-hand opportunity to become directly involved with the new version's functionality, testing and development phases.

1.2 PRINCIPAL BUSINESS LOCATION

Smart ERP Solutions Inc.
4683 Chabot Drive, Suite #380
Pleasanton, CA 94588

1.3 PRIMARY LINE OF BUSINESS

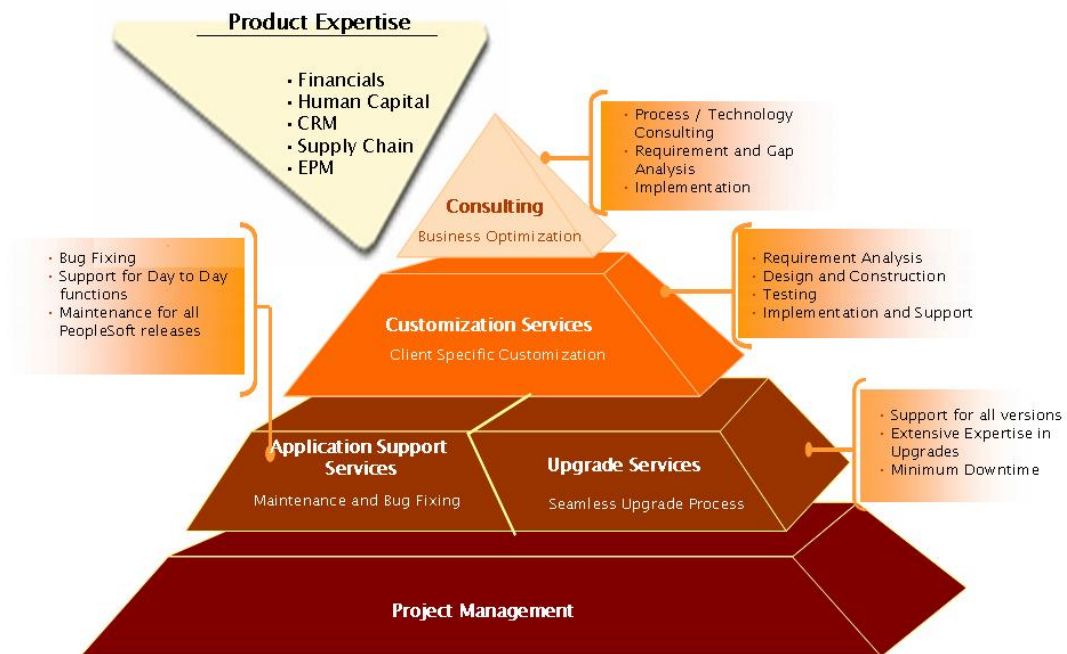
SmartERP's primary line of business is providing innovative solutions and services to PeopleSoft customers. Our PeopleSoft Practice is focused on delivering application and technology solutions that improve business excellence. Working with many clients across North America, SmartERP brings teams of experienced "hands-on" consultants with intimate knowledge of the products and processes to create the value-driven solutions that can take your businesses to the next level. Our consultants understand your complex and changing business environment and will develop strategies that focus on management, operational and technical solutions.

Our services cross the continuum of the PeopleSoft product lifecycle. They include:

- Client advisory services to help define clients' best strategy for gaining value from their PeopleSoft applications
- Implementation services for new PeopleSoft customers
- Module extensions for current clients seeking to customize or enhance their existing solutions
- Upgrade services for clients that are extending the return on their initial PeopleSoft investment and enjoying the value of the Applications Unlimited offering
- Module additions for clients that are looking to improve business processes and efficiencies with the implementation of previously acquired modules
- Support services for delivering a cost-effective maintenance, operational support and help desk service to our clients' internal customers
- Training and change management enabling the wider and positive acceptance of the PeopleSoft solutions across the organization

HIGHLIGHTS OF OUR PEOPLESOFT PRACTICE

- **Experienced Consultants:** We have over 200 PeopleSoft experts in the US and India, averaging 8+ years of PeopleSoft experience and over 1500 years of combined PeopleSoft experience
- **Full Services:** We offer a full range of services – from initial assessments to full life-cycle implementations, upgrades, and on-site or remote support
- **Extensive Experience:** We have performed over 80 PeopleSoft engagements including implementations and upgrades for clients in Federal and State departments, Education, Health Care, Technology and BFSI industries
- **Oracle Partnership:** SmartERP is a worldwide Platinum Partner
- **Methodology and Tools:** Through our extensive PeopleSoft experience we have developed proprietary tools that facilitate implementation and upgrade projects
- **Upgrade Accelerator:** A powerful tool that saves time and money in the critical initial stages of a PeopleSoft upgrade.



RANGE OF PEOPLESOFT SERVICES

We offer breadth and depth of experience and significant PeopleSoft expertise. Our full range of PeopleSoft services covers both on-site and remote delivery, from initial implementation to additional functionality and post go-live upgrades, updates and support.

Full Scale Implementations:

Project scoping and planning
 Solution design/prototyping/customization
 Configuration and base table setup
 Interface and conversion programming
 Implementation rollout

Mini Implementations:

Extension of existing functionality
 Additional modules
 Workflow
 Web integration

Post Implementation Services:

Upgrades to new releases

Application of maintenance packs and patches and fixes
Application of tax updates
Production support
DBA support services
Remote application services

EXPERIENCED PEOPLESOFT CONSULTANTS

The SmartERP PeopleSoft Practice employs over 150 PeopleSoft practitioners with experience in multiple implementations and upgrades. All of our PeopleSoft consultants are full-time employees of SmartERP, not subcontractors. Many of these consultants are certified by Oracle/PeopleSoft. On average, SmartERP consultants have over five years of PeopleSoft experience, making us one of the most experienced PeopleSoft consulting firms around. We have expertise in all functional and technical areas of the PeopleSoft product line, and our portfolio of skills encompasses HCM, Financials, CRM, Supply Chain, and Campus suites of products.

SmartERP also employs an “experienced hire model” whereby our senior practitioners conduct rigorous screenings of potential candidates. Our hiring model ensures that our consultants possess years of hands-on PeopleSoft experience in large-scale, complex PeopleSoft implementations, enhancements, and upgrades as well as in rapid, focused implementations and upgrades. The result of so conscientious a recruitment process is a practice of highly talented and experienced PeopleSoft professionals, averaging five years or more of hands-on experience delivering PeopleSoft solutions.

EXCEPTIONAL PEOPLESOFT CREDENTIALS

Our success in managing projects and providing highly skilled and specialized consulting services to our clients has allowed us to build a dynamic staff of more than 150 PeopleSoft professionals.

PROPRIETARY METHODOLOGY AND TOOLS

Our experience implementing and upgrading PeopleSoft application has led to the development of a number of proprietary implementation and upgrade tools including:

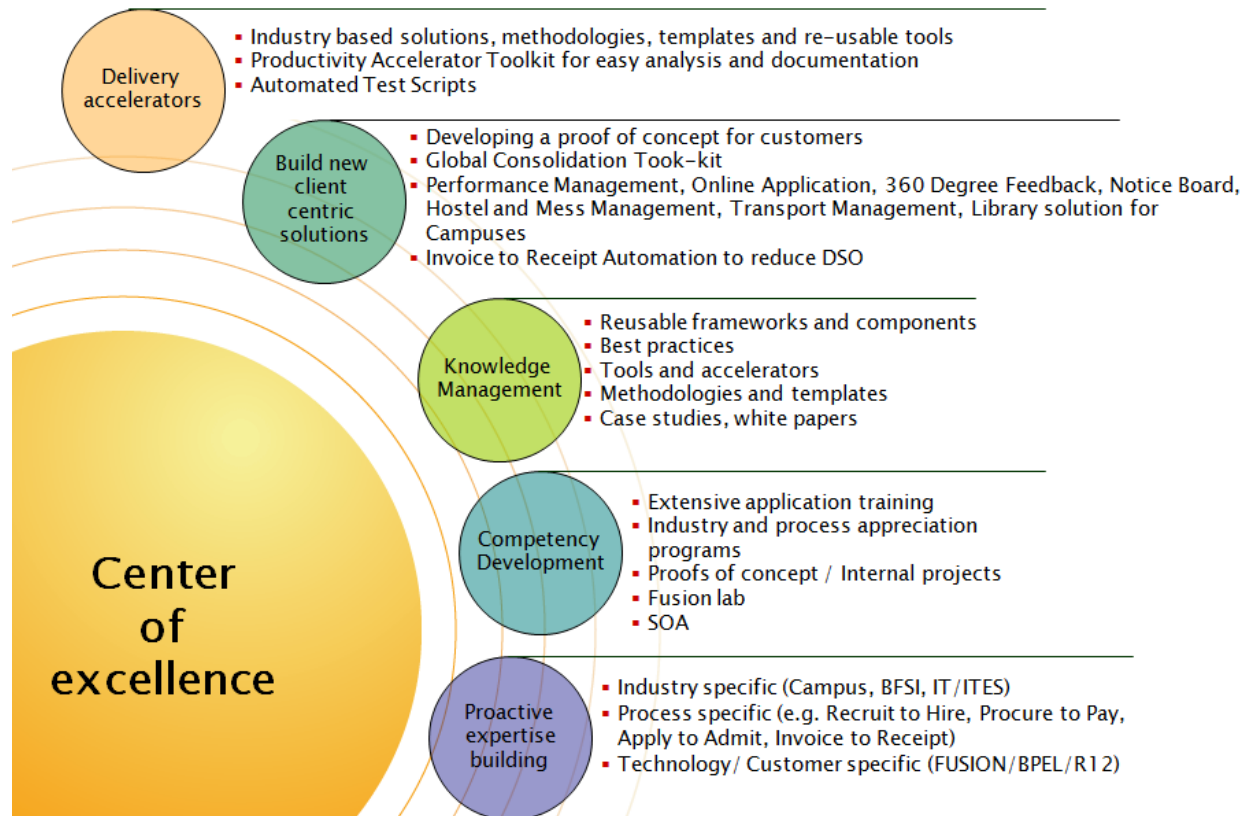
- Implementation Methodology
- Rapid Upgrade Methodology
- Upgrade Accelerators
- PAT Tool for automating Technical Designs
- Test Scripts Package

OUR VALUE PROPOSITION

Among our key strengths is the fact that our PeopleSoft consultants possess extensive experience working in various environments, particularly within meeting the challenges associated with an upgrade effort. Our Experienced Hire Model ensures that our typical consultant possesses approximately 5 years of hands-on

PeopleSoft experience, in large-scale complex PeopleSoft implementations, enhancements, and upgrades, as well as in rapid, focused implementations and upgrades.

We also have extensive experience with the development and testing of PeopleSoft 9.x and the Upgrade Scripts used by customers to move to 9.x. Finally, our consultants continue to work with PeopleSoft's corporate headquarters in their development and support organizations. All told, our success can be attributed to the simple fact that our clients value our flexibility, our expertise, and our cost effectiveness.



HIGHLIGHTS OF OUR PEOPLESOFT PRACTICE

A Worldwide Oracle Platinum Partner, SmartERP brings extensive capabilities and experience to this project including having:

- Successfully delivered several PeopleSoft implementation/upgrade engagements
- Successfully completed several engagements utilizing SmartERP's global delivery model
- Capability to provide the right combination of project management and functional and technical services
- Extensive experience in HCM, Payroll, Financials, ESA and Campus product modules
- Over 150 PeopleSoft specialists
- Highly experienced and certified consultants

2. LIST OF OUR CLIENTS AND REFERENCES

SmartERP has executed several similar projects over the last few years. SmartERP solutions and services for PeopleSoft are in use in many organizations across higher education, public sector and commercial sectors including Northwestern University, Howard University, University of North Carolina, Wesleyan University, Emory University, Florida International University, State of Ohio, State of Delaware, County of Solano, County of Napa, City and County of San Francisco, a Federal Government Agency with global presence, US Census Bureau, Randstad Staffing, Berlin Packaging, American Solutions for Business, Chesapeake Energy, Boise Inc., and Cherokee Nation Businesses to name a few.



"SmartERP did a commendable job by delivering Smart Keys in a very short time frame. The way they took the product well beyond the basic concept is amazing. They identify what the customers are exactly looking for and build a Solution to meet those needs"

Emory University

"The new system is providing tremendous benefits to the university and the add-ons provided by SmartERP accelerated our project and introduced important new functionality into the standard PeopleSoft application"

Wesleyan University

"Smart Workflow is an invaluable, user-friendly, addition to our PeopleSoft. SmartERP personnel are intelligent, efficient and truly stand by their product"

CCHMC

"We take the Smart Security data, we send it over to EPM, and then that is what Cognos pulls from...so we've secured not only PeopleSoft components but all of our Cognos reports with the Smart Security logic"

Northwestern University

"... Countywide, departments and HR process approximately 5,400 PAF per year . . . staff estimates a 300% ROI for this project in its first full year . . ."

Solano County Department of HR,

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

State of Delaware

We have selected the following current project references to illustrate our experience with similar clients and projects. We have provided implementation and upgrade services for several clients both in higher education, public and private sector.

Client	Wesleyan University
Contact	Barbara Spadacinni Project Leader Room 422 North College 237 High Street Middletown, CT 06459 P. (860) 685-3004 E. bspadaccini@wesleyan.edu
Description	Maintenance and Support for Smart Solution add-ons to PeopleSoft Financials providing enhanced security, advanced workflow and operational efficiencies through automation, streamlining and simplification; PeopleSoft Financials new implementation
Project Dates	2009

Client	Howard University
Contact	Saadya Russell, HR Applications Manager 2400 Sixth St NW Washington, DC 20059 P. (202) 806.0845 E. saadya.russell@howard.edu
Description	Implementation, Support, HR Form automation enhancements; and Upgrade of PeopleSoft HCM to V9.1, PeopleSoft Administration
Project Dates	2012-Current

Client	State of Delaware
Contact	Kamlesh Sheth, State Technical Lead 800 Silver Lake Blvd Dover, DE 19904-2402 E. Kamlesh.sheth@state.de.us P. (302) 739-2061
Description	Maintenance and Support for Smart Solution add-ons for PeopleSoft Financials and HCM providing enhanced security, advanced workflow and operational efficiencies through automation, streamlining and simplification; awarded the services contract for performing the State's PeopleSoft 9.1 Upgrade

Project Dates	January 2007 – Present
----------------------	------------------------

Client	Solano County
Contact	Donna Caldwell, Human Resources Operations Manager 675 Texas Street, Suite 1800 Fairfield, CA 94533 E. dmccaldwell@SacramentoCity.com P. (707) 784-6179
Description	Awarded competitive bid contract for Licenses, Maintenance and Support for Smart Solution add-ons for PeopleSoft HCM providing operational efficiencies through the elimination of paper personnel action forms with advanced workflow; HCM upgrade services
Project Dates	January 2011 – Ongoing

Client	Berlin Packaging
Contact	Mary Gallitano, Application Development Manager 525 West Monroe, 14th Floor Chicago, IL 60661 P. (312) 869-7543 E. Mary.Gallitano@berlinpackaging.com
Description	PeopleSoft Financials and Supply Chain 8.8 to 9.1 Upgrade; Licenses, Maintenance and Support for Smart Solution add-ons to PeopleSoft providing operational efficiencies through user productivity enhancements
Project Dates	2011 – present

Client	Cincinnati Children's Hospital Medical Center
Contact	Alan French, Executive Director Financial Systems 3333 Burnet Ave. Cincinnati, OH 45229 P. (513) 636-8988 E. Alan.french@cchmc.org
Description	Licenses, Maintenance and Support for Smart Solution add-ons to PeopleSoft Financials providing advanced workflow and operational efficiencies in numerous areas including Travel & Expense, Journals and Billing; services for upgrade Financials 9.1.
Project Dates	2007 – present

Client	WellPoint
Contact	Ann Hansen Account Mgmt Exec Advisor Product Owner PeopleSoft at Wellpoint E. Ann.Hansen@bcbswi.com P. +1-262-443-1523
Project Description	PeopleSoft HCM Upgrade from V9.0 to V9.2
Project Dates	2013 – present

Client	SkillSoft
Contact	Pam MacDonald Project Manager E. Pam_MacDonald@skillsoft.com P. +1-603-566-3033
Project Description	PeopleSoft HCM and Financials Upgrade PeopleSoft Support, PeopleSoft Application Administration
Project Dates	2007 – present

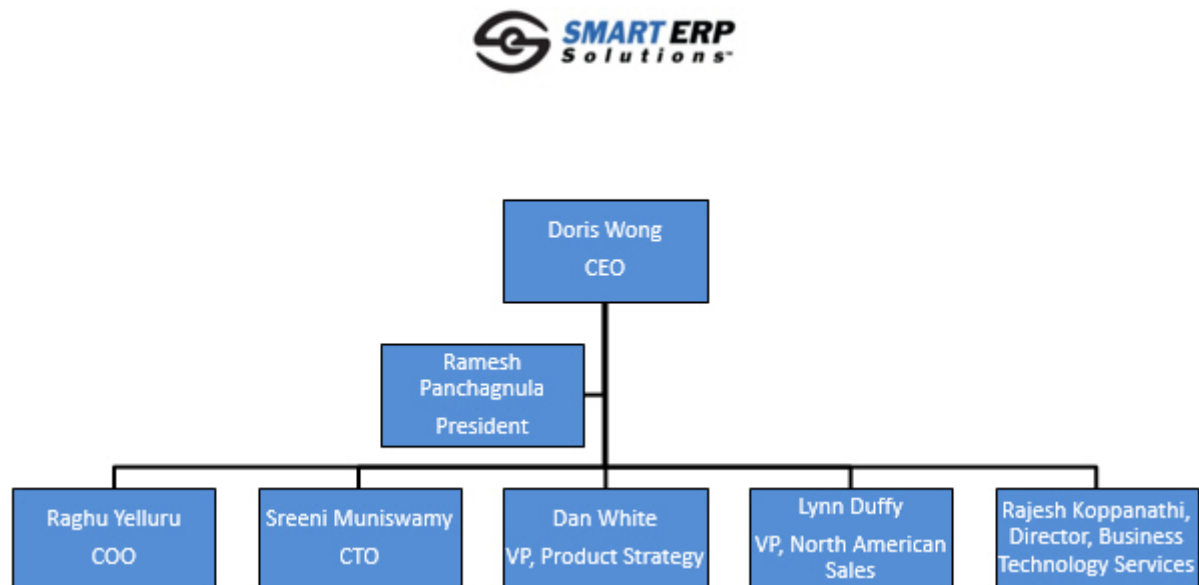
Client	Time Warner Cable
Contact	Ron Armenoi Director Applications E. Ron.Arminoei@twcable.com P. +1-704-731-3335
Project Description	PeopleSoft HCM and Financials Upgrade PeopleSoft Support, Database and Application Support, Custom PeopleSoft Development
Project Dates	2006 – present

3. LIST OF CLIENTS LOST IN LAST 5 YEARS

SmartERP has not lost any clients in the last 5 years due to early termination or non-renewal. We work very closely with our clients and take utmost care to keep them happy. 100% of our clients are reference able.

4. ORGANIZATION STRUCTURE

Below is a high level organization chart of SmartERP.



5. YEARS OF EXPERIENCE PROVIDING SIMILAR SERVICES

SmartERP has over 8 years of experience providing similar services in PeopleSoft ERP Consulting in areas of PeopleSoft Applications, PeopleSoft Administration and Database Administration. Furthermore, SmartERP is comprised of former Oracle/PeopleSoft employees many having worked with PeopleSoft applications for 12 years or more.

B. SERVICES OFFERED

1. SMARTERP PERSONNEL AND RESUMES

Our qualified personnel are truly what set SmartERP apart from our competition. We bring decades of experience to each and every project we embark upon. Our clients benefit from this not only through the successful execution of the project, but also through the communicative, positive and long-standing relationships we nurture with each of our clients.

Our team is comprised of Executives, Strategists, Developers, Analysts, Quality Assurance, and Support experts who worked many years at Oracle and PeopleSoft. Our resources have demonstrated expertise in PeopleSoft technologies, processes, functionality, and quality analysis.

We have a large pool of over 250 resources, both onsite and offshore including PeopleSoft Applications (HCM and Finance), PeopleSoft Application Administration, Database Administration and Business Intelligence. These resources are grouped into various functional and technical competencies. These competencies act as backbone pillars on which the entire Organization structure is built.

Competency Group	Number of Resources
PeopleSoft HCM	105
PeopleSoft Financials	70
PeopleSoft Application and Database Administrators	45
Business Intelligence	40
Functional Testing and Automation	15

For the University of Central Florida project, we are assigning a team of highly qualified individuals who will provide the County with the highest-quality service. The following table provides a snapshot of our team available for this project:

Proposed Individual	Project Role	Years of Experience
Sunny Kaul	PeopleSoft HCM Functional Consultant	8
Vikas Sharma	PeopleSoft HCM Functional Consultant	8
Ramesh Bhaliya	PeopleSoft HCM Technical Consultant	9
Suresh Nagabhushan	PeopleSoft Finance Functional Consultant	8

Dharmendra Gohil	PeopleSoft HCM Technical Consultant	11
Surendra Garlapati	PeopleSoft Finance Technical Consultant	3.9
Abdul Latif	PeopleSoft Finance Technical Consultant	4
Kumar Vela	PeopleSoft Administrator	6
Keyur Makwana	Database Administrator	11.5
Manish Kumar	Database Administrator	13
Mrugank Shah	Database Administrator	15

Sunny Kaul

HCM Functional Consultant

Skills- Functional

- Accomplished PeopleSoft Functional Consultant with extensive knowledge of developing, designing and upgrading PeopleSoft HR and Payroll systems.
- Great depth of understanding on the SDLC approach and Global implementation methodologies.
- Good exposure to maintenance of HR and Payroll system of multiple Fortune 500 clients.
- Excellent requirement gathering and customer facing skills.
- Reasonably proficient exposure to technical skills like SQL, SQR reporting, App Designer, App. Engine, PeopleCode, CI.

Project Experience

Client : WellPoint-Anthem
Title : Upgrade Lead
Technology : PeopleSoft-HRMS 9.2

Description

Core-HR, Benefits, ESS-MSS, NA Payroll, T&L

Roles and Responsibilities as an Implementation Lead

- 9.2 new feature demonstration (across all modules).
- Onsite Coordinator for Fit-Gap and current system discovery sessions.
- Managing a team of Functional and Technical resources for the delivery of work in modules like T&L, NA Payroll, ESS-MSS, Benefits, and Core HR. (work related to retro-fitting and new functionality implementation)
- Personally involved in work related to Core HR, Benefits and ESS-MSS as a functional consultant participating in business discussion, document preparation, and development and testing phases.
- Involved in creating & maintaining the project plans.
- Involved in UAT session and training to users. (Classroom and Online)

Project Experience

Client : Visteon Corporation
Title : Implementation Lead Consultant
Technology : PeopleSoft-HRMS 9.1 and UPK tool

Description

Core-HR Module, Benefits, Payroll Interface, UPK tool

Roles and Responsibilities as an Implementation Lead

- System Design forms a Standard Global Architecture perspective.
- Implementation responsibilities for European locations included, Product functionality demonstrations, Requirement gathering, Preparation of Fit-Gap and configuration documents, User help documents and Implementation data upload templates.

- Designing country specific HR customizations for Slovakia and Portugal.
- Involved in creating & maintaining the project plans.
- Involved in UAT session and training to users. (Classroom and Online)
- UAT Testing and get the approval from the business team to migrate the things to production environment.
- Implementation, Configuration & Migration of Core-HR & Payroll Interface, Customizations on Core-HR & Payroll interface to cater client requirement.
- Providing support on Core-HR & Payroll Interface.

Project Experience

Client : Central Bank of India
 Title : PeopleSoft Functional Payroll Lead
 Technology : PeopleSoft HRMS 9.1

Description

The CBI – Central Bank of India has a huge employee base of 45,000 and growing. IBM-CBI tie-up talks about a 5 year contract for their entire HRMS system growing into PeopleSoft environment. Core HR, Self Service and Global Payroll are on the top of the pack for this PeopleSoft HRMS 9.1 implementation.

Roles and Responsibilities as an Implementation Lead

- Requirement gathering on configuring the Global Payroll IND system.
- Designing solutions and strategy for the for the GP rollout form the for more than 16 zones (45000 people)
- Data migration from their legacy Payroll system called RAMCO.
- Participate in change request planning and roll out plan for all zones of CBI, country wide
- User acceptance testing for Global Payroll module.

Key learning's in this role were the core consulting work of requirement gathering and preparing the design documents and roll out plans.

Project Experience

Client : Goldman Sachs
 Title : PeopleSoft Functional Payroll Consultant
 Technology : PeopleSoft HRMS 9.0

Description

Goldman Sachs is a leading financial institution in the world. The 'Goldman Sachs Global Payroll Support Project', is supporting the HR and Payroll, processes of the company. There are projects which support a PS HRMS 8.8 system, PS HRMS 7.5 system, PS HRMS 3.0 system and PS HRMS GP9 systems.

Roles and Responsibilities as a Payroll Functional Consultant

- Provide the primary support to the GP9 users for the various countries (US, India, Singapore, and Japan).

- Provide the HCM support to users using customizations over the Core HR module.
- Provide trainings, to the Users using the classroom methodology, preparing training material.
- Participating in new roll out for markets in EMEA region.

My ability to Leading and Training team is a typical 'Support Environments' is developing further with some great learning experiences.

Project Experience

Client : Glakso Smith Kline (GSK)
 Title : PeopleSoft Techno-Functional HRMS Consultant
 Technology : PeopleSoft HRMS 8.9, 8.9, 9.0

Description

GlaxoSmithKline (GSK) is a world leading research-based pharmaceutical company with a powerful combination of skills and resources that provides a platform for delivering strong growth in today's rapidly changing healthcare environment.

Roles and Responsibilities a HR and Payroll Support Consultant

- Drafting the road map for getting all 16+ markets of GPS on the same architectural platform.
- Initiate negotiations with the client, Business users, and Market customers, to make them realize the benefits of merger into a common standard architecture. Of course with a great documentation support and basic facts and figures.
- Capturing the design details for implementation. Discussing various issues and functional details to be incorporated into the system.
- Handling requests from the Client for development of new Functionality or systems or modification of the existing programs or any other subsystem those are essential for supporting ongoing business.
- Monitoring the deliverables in a support role.
- Handling requests from the Client for development of new Functionality or systems or modification of the existing programs or any other subsystem those are essential for supporting ongoing business.
- Assignment of remedy tickets to the team and providing resolutions within the given timelines.
- Functional and technical delivery in charge of all SQR's and Application engines.

With this projects experience, my "Skill Bag" looks good filled with a sound knowledge of managing teams of both function and technical and non-technical flavors.

Project Experience

Client : R S Means (Reed INC, USA)
 Title : PeopleSoft Techno-Functional HRMS Consultant
 Technology : PeopleSoft HRMS 8.9, 8.9, 9.0

Description

RSMeans is North America's leading supplier of construction cost information. A product line of Reed Construction Data, RSMeans provides accurate and up-to-date cost information that helps owners,

developers, architects, engineers, contractors and others to carefully and precisely project and control the cost of both new building construction and renovation projects.

Roles and Responsibilities as a Techno-Functional Consultant

- Report development using SQR's.
- Customization and Development of pages and Components (written People Code, to perform the authentication of data etc.
- The ability to stretch and work were recognized and they acted as a boon the team's performance.

With this projects experience, my "Skill Bag" looks good filled with a sound knowledge of the PeopleSoft Technical along with a hunger to explore some of the functional domains as well.

Education

Bachelor's in Engineering (E&C), Bangalore Institute of Technology.

Vikas Sharma

Peoplesoft HRMS/HCM Techno-Functional Consultant

Skills- Functional

- PeopleSoft HRMS/HCM 8.9, 9.0, 9.1 & 9.2
- Payroll for North America and e-Pay
- Base Benefits
- Core HR

Skills- Technical

- PeopleTools - Peoplecode, Application Engine, Component Interface, File Layout, Workflow, Excel to CI, Application Packages
- Reporting Tools - SQR, PS Query, XML Publisher

Project Experience

Client : Belk Inc. Charlotte, NC, USA
Technology : PeopleTools 8.53, PeopleSoft HCM 9.2
Role : HCM Functional Consultant

Description

PeopleSoft HCM upgrade from application version 9.0 to 9.2

Roles and Responsibilities

- Requirement gathering and fit-gap analysis
- Review functional requirement documents
- Review SIT, UAT and Payroll parallel test plans
- Prepare Payroll parallel and Payroll UAT test scenario and test cases
- Lead & execute PeopleSoft payroll parallel testing in 9.2 including defects tracking
- Lead and execute user acceptance testing including defects tracking

Project Experience

Client : Belk Inc. Charlotte, NC, USA
Technology : PeopleTools 8.49, PeopleSoft HRMS 9.0
Role : Functional Consultant

Description

PeopleSoft HRMS 9.0 production support

Roles and Responsibilities

- Analyze and resolve payroll related issues in PeopleSoft
- Co-ordinate with HR/payroll person in various Belk stores to help them understand and resolve payroll issues in PeopleSoft

- Work with development team for requirements & user acceptance testing of new enhancements and tax updates
- Perform payroll data audits and work with end users to resolve data issues
- Perform bi-weekly payroll schedule execution through JobTrac that includes end-to-end payroll processing
- Identify and resolve data integrity issues between T&A applications (Timera and Reflexis) and PeopleSoft systems

Project Experience

Client : Asurion, Nashville, TN, USA

Technology : PeopleTools 8.50, PeopleSoft HRMS 9.0

Role : Worked as systems analyst to support PeopleSoft HCM 9.0 and other integrated applications

Description

PeopleSoft HRMS 9.0 production support

Roles and Responsibilities

- Work with HR & Payroll business users to propose them best HR/Payroll practices and use of PeopleSoft system
- Analyze and fix system related issues in PeopleSoft
- Coordinate between business users and development team to understand new business needs requiring system enhancements
- Administer interfaces between PeopleSoft & ADP (payroll system) and PeopleSoft & Bswift (Benefits system)
- Perform recurring audits (daily & weekly) to ensure data integrity between PeopleSoft, payroll (ADP) and Bswift systems
- Developments of HR and payroll reports required to support business needs
- Manage, review and make recommendations to improve system related current HR business processes and practices

Project Experience

Client : Honeywell Technology Solutions, Bangalore, India

Technology : PeopleTools 8.51, PeopleSoft HCM 9.1

Role : Sr. Technical Consultant

Description

PeopleSoft HCM 9.1 and People Tools 8.51 Implementation

Roles and Responsibilities

- Understand and document functional and technical specifications
- Provide development effort estimations
- Lead the development team for compensation related developments
- Coordinate with on-site business users and technical leads in US & UK
- Worked on development of multiple bolt-on modules

- Work on file transfers between PS to vendor using PS delivered SFTP functionality

Project Experience

Client : Teradata Corporation, Dayton, Ohio, USA
 Technology : PeopleTools 8.49, PeopleSoft HCM 9.0
 Role : On-site Technical Lead

Description

Project: PeopleSoft North American Payroll implementation in HRMS 9.0 application

Roles and Responsibilities

- Requirement gathering, fit-gap analysis, functional design and technical design
- Documentation for requirements, fit-gap, functional design, technical design, and training materials
- Product configuration and development of client specific requirements
- Development of around 15 inbound and outbound interfaces with vendors managing benefit administration for Teradata. Vendors are Fidelity, MetLife, Hewitt, JP Morgan, Cigna, TALX, GXS
- Data conversion & migration from legacy system to PeopleSoft
- User Trainings and assist business users with UATs
- Parallel payroll runs for 2 payroll cycles
- Development of payroll related reports

Project Experience

Client : Aditya Birla Minacs, Farmington Hills, MI, USA
 Technology : PeopleTools 8.49, PeopleSoft HCM 9.0
 Role : On-site technical and functional lead

Description

PeopleSoft HRMS 9.0 implementation

Roles and Responsibilities

- Analysis of current business processes in Minacs and make recommendations to improve current processes
- Requirement gathering, fit-gap analysis, functional design and technical design
- Documentation for requirements, fit-gap, functional & technical design and training materials
- Product configuration and development of Client specific requirements
- Data Conversion & migration from legacy system to PeopleSoft
- User trainings and assist users with UATs
- Parallel payroll runs for 6 payroll cycles
- Development of payroll related reports

Project Experience

Client : ING Vysya Bank Pvt. Ltd. Bangalore, India
 Technology : PeopleTools 8.49, PeopleSoft HCM 9.0

Role : Technical Lead

Description

PeopleSoft Global Payroll implementation

Roles and Responsibilities

- Development of payroll enhancements as per customer specific requirements
- Data Conversion & migration from legacy system to PeopleSoft Global Payroll
- 10 months of past payroll runs for reconciliation b/w legacy and PeopleSoft GP
- 2 months of parallel payroll runs (Feb-2009 to March-2009)
- Development of payroll related reports using XML Publisher and online pages.

Project Experience

Client : Canara Bank, Bangalore, India

Technology : PeopleTools 8.49, PeopleSoft HCM 9.0

Role : Technical Consultant

Description

PeopleSoft HRMS 9.0 implementation

Roles and Responsibilities

- Implemented Workforce Administration, Enterprise Learning, Profile Management and Other Bolt-on modules
- Requirement gathering and preparation of functional, fit gap and technical documents
- Functional and technical Design
- Data conversion and migration
- Technical development and testing

Project Experience

Client : WNS, Mumbai, India

Technology : PeopleTools 8.49, PeopleSoft HCM 9.0

Role : Technical Consultant

Description

New Enhancements in PeopleSoft HRMS 9.0 Employee Self Service

Roles and Responsibilities

- Technical design, development & testing of new ESS pages (Global Payroll)
- Technical design development & testing of dynamic workflow for address change request through ESS

Project Experience

Client : Village Care of New York, NY, USA

Technology : PeopleTools 8.47, PeopleSoft HCM 8.9

Role : Associate Technical Consultant

Description

PeopleSoft HRMS 8.9 support

Roles and Responsibilities

- Production support and new enhancements for Payroll for North America & Core HR
- Implemented Kronos to PS interface using AE and component interface
- Application of tax-updates and security patches
- Development of many reports and batch processes as per customer's requirements
- Development Data upload utilities using File layouts and component interfaces
- Maintenance and enhancement in user security and row level security
- Development and configuration of workflows

Project Experience

Client : RMS Inc, NC, USA

Technology : ASP, Visual Basic, Java Script and HTML

Role : Software Engineer

Description

RMS support and enhancements

Roles and Responsibilities

- Implemented a new module in RMS Using ASP at front-end, VB DLL in middle tier and SQL Server at backend. POC for 2 modules of RMS applications

Education

Bachelor of Engineering in Information Technology from Rajasthan University, Jaipur, India

Ramesh Bhaliya

Senior HCM Techno-Functional Consultant

Skills- Functional

- Techno-Functional consulting experience in PeopleSoft HRMS Implementation, Support and Maintenance
- Functional knowledge of Global Payroll and Absence Management in Peoplesoft HRMS and Campus Solution 8.90 ,9.0 and 9.1, eDevelopment and administer Training, eProfile in Peoplesoft HRMS and Campus Solution 9.0, Payroll for North America in PeopleSoft HCM 9.2
- Technical expertise in PeopleSoft technologies. Developed PeopleSoft Applications using PeopleTools (Releases 8.42 to 8.53) technologies and tool sets - App Designer, PeopleCode, SQL, Component Interface, Data Mover and PSQuery, PS Security and Core HR Setup
- Implementation Experience of PeopleSoft HCM in Banking, retail, IT and ITES sector
- eDevelopment and administer Training, eProfile in Peoplesoft HRMS 9.0

Project Experience

Client : Belk Inc., USA

Title : Functional consultant for Payroll for North America

Technology : PeopleTools 8.48, 8.53, PeopleSoft HCM 8.9 and 9.2

Description

PeopleSoft application upgrade from 8.9 to 9.2

Roles and Responsibilities

- Provide a solution to enhance the existing version 8.9 to 9.2 by using the new features and functionality provided by the PeopleSoft HCM 9.2 version
- Prepare the UAT script for end to end payroll testing
- Ensure the through testing of the solved issues and successful migration to production environment
- Coordinate between IT team and end user team to deliver the project on time

Project Experience

Client : Oceaneering International Inc, India

Title : Sr. PeopleSoft functional Consultant for Global payroll and absence management

Technology : PeopleSoft HCM 9.1

Description

Global Payroll and Absence Management Support

Roles and Responsibilities

- As a part of support function, solve the payroll and absence related functional issues based on the priority, in consultation with client, to enhance the system
- To provide a payroll processing and rule configuration/modification specific support for country extensions like UK, Dubai and India
- Apply all GP Packages for all the countries installed till the latest release, through system testing post Tax updates

- Ensure the through testing of the solved issues and successful migration to production environment

Project Experience

Client : UST Global, India
 Title : Sr. PeopleSoft functional Consultant for Global payroll
 Technology : PeopleSoft HCM 9.1

Description

PeopleSoft HCM Global Payroll (India) Implementation

Roles and Responsibilities

- Spearheading various Fit Gap sessions and product demo sessions to find Gaps between Delivered functionality and UST global specific business processes and documenting the same
- Coordinate in creation of detailed technical design documents for customized processes to fit UST Global business requirements
- Creation and Optimization of all UST Global specific Payroll Rules and related Customizations
- Actively participating in the Implementation Setup and maintenance of Global Payroll product for the India country extension
- Configuration of GP to GL integration and send across the cost to Peoplesoft Finance General Ledger. Mapping of accounts at employee, job code and company level

Project Experience

Client : ING Vysya Bank Ltd., India
 Title : Sr. PeopleSoft functional Consultant for Global payroll and absence management
 Technology : PeopleSoft HCM 9.0

Description

PeopleSoft HCM 9.0 Global Payroll (India) and absence management support

Roles and Responsibilities as a Global Payroll Functional Consultant

- Support and maintenance of Global Payroll and Absence Management implementation of ING Vysya Bank Limited. This includes the payroll processing of 6000 (IBA) employees and 2000(CTC) employees
- As a part of support team, solve the payroll and absence related functional issues based on the priority, in consultation with client, to enhance the system
- Prepare the UAT script and migration document
- Ensure the through testing of the solved issues and successful migration to production environment

Project Experience

Client : Aditya Birla Minacs, India
 Title : Sr. PeopleSoft functional Consultant for Global payroll and absence management
 Technology : PeopleSoft HCM 9.0

Description

PeopleSoft HCM Global Payroll (India) Implementation

Roles and Responsibilities

- Involved in various Fit Gap sessions to find Gaps between Delivered functionality and requirement of Minacs and documenting it
- Actively involved in the Implementation Setup and maintenance of Administer Workforce, Global Payroll and absence management to cater needs of ABMITS
- Creation and Optimization of all Payroll, Absence Rules and Customizations
- Configuration of GL accounts and Customization of GP to GL interfaces to send the processed payroll cost to PeopleSoft finance General Ledger
- End to End Implementation and Go Live of Payroll after Various Stages of parallel runs with the Legacy Application. This was a task involving the Implementation across the country for 20 different HR sites and around 8000 Employees

Project Experience

Client : East Kentucky Power Cooperative, KY, USA
Title : Sr. PeopleSoft Consultant, onsite coordinator
Technology : PeopleSoft FSCM 9.0

Description

PS FSCM integration to Mobile application Implementation

Roles and Responsibilities

- As a part of onsite team, I was actively involved in understanding the working of PS FSCM purchasing, inventory and maintenance management modules and requirement gathering, preparing technical and functional documentation for the suggested customizations
- Configure Integration Broker setup to integrate with third party system
- Creation of web services out of PeopleSoft Components, provide and consume the web service from Third Party (non PS) system

Project Experience

Client : Oracle Financial Services Ltd., India
Title : Sr. PeopleSoft HCM Consultant
Technology : Peoplesoft HRMS 9.0 Implementation- Core HR, eDevelopment, eProfile, Administer Training

Description

PeopleSoft HCM Global Payroll (India) Implementation

Roles and Responsibilities

- Requirement gathering from users
- Preparation of functional, SRS, Fit Gap and Technical documents
- Preparation of data migration/conversion strategy document
- From the scratch implementation and customization in Peoplesoft HRMS 9.0
- Developing Data upload utilities as well as data migration scripts
- Create new pages and components for new feature and reports as per business requirements.
- Provide production support to the client as and when required.

Project Experience

Client : Canara Bank, India
Title : Sr. PeopleSoft Global Payroll Consultant
Technology : Peoplesoft HRMS 9.0

Description

PeopleSoft HCM Global Payroll (India) Implementation

Roles and Responsibilities

- From the scratch implementation and customization in Peoplesoft Global Payroll
- Global Payroll set up related activity
- Creation of payroll related formulae as per the rule of the IBA
- Create new pages and components for new feature and reports as per business requirements.
- Create Component Interfaces and ExceltoCI to create and update the integrated data to the delivered pages
- Create PSquery for reporting purpose
- Retro trigger, Mass retro trigger, Segmentation trigger setup and processing

Project Experience

Client : Bank of India, India
Title : PeopleSoft HCM Consultant
Technology : Peoplesoft HRMS 8.9

Description

PeopleSoft HCM Implementation

Roles and Responsibilities

- Requirements gathering from users
- Preparation of functional and Technical documents to automate the entire payroll process
- From the scratch implementation and customization in Peoplesoft Global Payroll
- Global Payroll set up related activity
- Creation of payroll related formulae as per the rule of the IBA
- Developing Data upload utilities
- Create new pages and components for new feature and reports as per business requirements.
- Create Component Interfaces and ExceltoCI to create and update the integrated data to the delivered pages, create PSquery for reporting purpose

Project Experience

Client : iGate Global Solutions, India
Title : PeopleSoft HCM Consultant
Technology : Peoplesoft HRMS 8.8

Description

PeopleSoft HRMS Maintenance and Support

Roles and Responsibilities

- Analyzing and classifying production issues in several applications
- Suggesting solution for the issues
- Customize existing People Code, component interface and workflow
- Perform unit and integration testing on custom Recruiting module, performance management module
- Improvement of the existing application, processes on basis of L2 call report
- Creating the requirement and solution document and test reports
- Provide production Support to end users

Education

Bachelor in Information Technology, Gujarat University

Suresh Nagabhushan

Senior FSCM Techno-Functional Consultant

Skills- Functional

- Proficient in PeopleSoft 8.8, 8.9, 9.0, 9.1 Financials - PeopleSoft General Ledger, Accounts Receivable and Accounts Payable
- Excellent knowledge in PeopleSoft 8.8, 8.9, 9.0, 9.1 Financials – Billing, Purchasing, eProcurement, Asset Management and Travel & Expenses

Project Experience

Client : Howard University, USA

Project : PeopleSoft 9.1 offshore Support

Description

Project is to support the Howard University users on the PeopleSoft Financials modules as a Functional Consultant. I worked onsite for 2 months to understand the Howard University PeopleSoft system and to meet all the users.

Project Experience

Client : DLZP, Texas

Technology : PeopleSoft 9.2 Financials Implementation - General Ledger

Description

Project is to implement PeopleSoft 9.2 Financials product - General Ledger.

Roles and responsibilities:

- Lead for General Ledger module
- Fit gap analysis, Functional and Technical design for identified gaps
- Configuration of PeopleSoft system to match clients transaction and reporting requirements, including decisions on Business units and Set ID'S
- Chart Field configuration to capture various chart fields, facilitating Reporting based on different Chart fields
- Hands-on development and testing (Unit, System, Integration)
- Preparation of Training Materials for end users, Demo and end user training for General Ledger module
- Configuration of Consolidation and Equalization processes
- Creation of Financial Reports using nVision

Project Experience

Client : University of North Carolina, USA.

Technology : PeopleSoft 9.1 Financials Implementation

Description

Project is to implement PeopleSoft 9.1 Financials.

Roles and responsibilities

- Part of the Technical Team involved in the Implementation
- Offshore Team Lead
- Understand the FDD sent by the onsite team and convert into TDD
- Co- Ordinate between the Offshore and the Onsite Team

Project Experience

Client : iGatePatni, Bangalore

Technology : nVision reports

Description

Project is to create the nVision reports for the financial reporting.

Project Experience

Client : Indian Institute of Management, Shillong

Technology : PeopleSoft 9.0 Support

Description

Project is to support the Finance users on the PeopleSoft Financials modules as a Techno- Functional Consultant.

Project Experience

Client : DLZP, Texas

Technology : Approval workflow Engine

Description

Project is to develop an Approval Workflow Engine for Lease Management Module.

Project Experience

Client : Syntel Inc.

Technology : PeopleSoft 9.0 Financials Consolidation

Description

Project is to implement the GL Consolidation for the Syntel Inc Business units.

Financial Consolidation in any company is one of the most important processes. Consolidation lead to publishing consolidated financial statements like Trial Balance, Income Statement, Balance Sheet etc. to Internal and External stakeholders. The interval of running consolidation process could be monthly, quarterly, yearly or based on any time span that organization defines in the system.

Roles and Responsibilities

- Fit gap analysis, Functional and Technical design for identified gaps
- Hands-on development and testing (Unit, System, Integration)
- Preparation of Training Materials for end users, Demo and end user training for Consolidation
- Configuration of Consolidation, Translation and Revaluation processes
- Creation of Financial Reports using nvision.

Project Experience

Client : Aditya Birla Minacs, India
Technology : PeopleSoft 9.0 Financials Implementation and Support

Description

Project is to implement PeopleSoft 9.0 Financials products-General Ledger, Accounts Receivable and Accounts Payable, Purchasing, Asset Management.

Roles and Responsibilities

- Lead for Accounts Receivable module
- Fit gap analysis, Functional and Technical design for identified gaps
- Configuration of Peoplesoft system to match clients transaction and reporting requirements, including decisions on Business units and Set ID'S
- Chart Field configuration to capture various chart fields, facilitating Reporting based on different Chart fields
- Hands-on development and testing (Unit, System, Integration)
- Preparation of Training Materials for end users, Demo and end user training for Accounts Receivables module
- Configuration of Consolidation, Translation and Revaluation processes
- Implementing Bank Reconciliation System
- Payroll to General Ledger Interface
- Creation of Financial Reports using nvision

Project Experience

Client : Times Warner Cables, USA
Technology : PeopleSoft 8.9 Financials Production Support

Description

Project is to support the TWC Users on the PeopleSoft Financials modules as a Technical Consultant.

Project Experience

Client : US Technology Resources Ltd, Trivandrum, India
Technology : PeopleSoft 8.9 Financials Implementation

Description

Project is to implement PeopleSoft 8.9 Financials products-General Ledger, Accounts Receivable and Accounts Payable.

Roles and Responsibilities

- Lead for Accounts Receivable module
- Fit gap analysis, Functional and Technical design for identified gaps
- Configuration of Peoplesoft system to match clients transaction and reporting requirements, including decisions on Business units and Set ID'S

- Chart Field configuration to capture various chart fields, facilitating Reporting based on different Chart fields
- Hands-on development and testing (Unit, System, Integration)
- Preparation of Training Materials for end users, Demo and end user training for Accounts Receivables module
- Configuration of Consolidation, Translation and Revaluation processes
- Creation of Financial Reports using nvision.

Project Experience

Client : BEA Systems, Inc, USA
Technology : Custom Invoicing

Description

Customized multiple Customer specific formats for easy processing – these formats were requested by customers of BEA. Invoice formats also included printing of customer specific data on invoice.

Roles and Responsibilities

- Modification of queries and Crystal reports for customer specific invoice formats

Project Experience

Client : Intelenet Global Services, Mumbai, India
Technology : PeopleSoft Financials Support

Description

Project was to support the IGS users on the PeopleSoft Financials modules as a Techno- Functional Consultant.

Project Experience

Client : Transworks India Pvt. Ltd. , Bangalore, India
Technology : PeopleSoft Financials Support

Description

Project was to support the Transworks users on the PeopleSoft Financials modules as a Techno- Functional Consultant.

Project Experience

Client : Sasken Communications, Bangalore, India
Technology : PeopleSoft Financials Support

Roles and Responsibilities

- Involved in development of a system that automates the advances paid against PO's
- Developed Consolidated Balance Sheet and Profit & Loss reports using nVision

Education

B.E., Vishweshwaraiah Technological University.

Dharmendra Gohil

Peoplesoft HRMS/HCM Techno-Functional Consultant

Skills- Functional

- PeopleSoft HRMS 8.8 , 8.9 ,9.0 and 9.1
- Core HR
- Global Payroll
- Absence Management
- Workforce Administrator
- Security Administrator
- MP and Upgrade Analysis

Skills- Technical

- PeopleCode
- Application Engine
- Component Interface
- File layout
- SQR
- Excel-To-CI
- Data Mover
- PS Query
- Integration Broker
- Oracle 8i , 9i , 10g

Project Experience

Client : Time Warner Cable, USA
Technology : PeopleTools 8.51, PeopleSoft 9.1
Role : PeopleSoft HRMS Technical Consultant

Description

PeopleSoft 9.1 HRMS Production Support

Roles and Responsibilities

- Requirement gathering, analysis and estimation
- Customized the careers page
- Customized/added the standard template
- PS Integration with MS outlook- Calendar invite
- Customized job posting
- Design and Development based on the requirements
- UAT- User interactions and assigning of the tickets to the team
- Analyzing Issue and Providing Root cause and provide Solution

Project Experience

Client : National Stock Exchange of India, Mumbai

Technology : PeopleTools 8.51, PeopleSoft 9.1
Role : Team Lead, implement Core HR, Global Payroll for country extinction IND

Description

PeopleSoft 9.1 HRMS, Global Payroll Implementation

Roles and Responsibilities

- Requirement gathering, analysis and estimation
- Designing Fit Gap , Functional Design document
- Designing Master and Transaction Data collection template
- Designing data porting Utilities for Core HR Masters , Job data and Compensation Data
- Security Setup , Row level Security , User Access matrix , User profile
- Configuration of Payroll with Past and parallel run
- Design Payroll related Reports like Salary Register , Form 24Q , Form 16 / 12BA
- UAT- User interactions and assigning of the tickets to the team
- Post Production Support

Project Experience

Client : Bank of India, Mumbai, India
Technology : PeopleTools 8.47, PeopleSoft HRMS 8.9, Oracle 9i
Role : Team Lead, implement Core HR, Global Payroll for country extinction IND

Roles and Responsibilities

- Team lead over all Project
- Requirement Gathering from Business Users AS IS Business Process
- Designing of Fit Gap document , Scope Document , Functional Design document after requirement Gathering
- Key Member for Core HR Global Payroll India & Absence Management
- Worked in India Payroll, for Form 16, IT Advice (Tax Work sheet) and Form 24 Q
- Conducting Walk through Session with Users for All Data Templates
- Writing Process Testing Scripts for Developer / Business User Testing
- Conducted Corporate Training to Business Users for Core HR, Global Payroll Process and Practical Navigation Base Demo
- New Module requirement, Status meeting with team and customers for UAT and go live prospect

Project Experience

Client : Patni computer System Limited, Mumbai
Technology : PeopleTools 8.48, PeopleSoft HRMS 9.0, SQL Server 2005
Role : Team Member, implement Core HR, Global Payroll and Absence Management

Description

iChange (PeopleSoft 9.0 upgrade from 8.8)

Roles and Responsibilities

- Key member Global Payroll & Absence Management for IND Extension Implementation Team

- Designed Functional Policy documents for India Payroll
- Fit Gap analysis of AS IS version and Business Processes with TO BE system and Business Process
- Analyses a Gap and Modify or Enhance Business process to best fitted in TO BE System
- Analysis of data Migration needed and Configuration which need to be migrated in new System
- Study of delivered elements available PeopleSoft Global payroll for each Country Extension especially for India, USA, UK, Mexico, & Japan and use of maximum delivered functionality given by PeopleSoft
- For Bolt-on I have created (A) Loan Self Service in which Loan is applied by Employee and request is rooted to centralize Location Finance Executive. Among them any one can review request of employee and approve Loan request and at the time of approval Loan data if Flown to PeopleSoft Finance for Final Loan Payment and also Flown to PeopleSoft Global Payroll for EMI recovery. (B) Payroll earning and deduction Self Service which can be use by employee for direct input to payroll base on approval cycle like FBEP, Club Patni, Give India, Over time, Production beeper
- Created Pay Matrix Functionality through which auto Pay Groups are identify for different Legal entities at the time of deputation of employee
- Developed Common to all App Package to passing inputs to payroll from other modules
- Crated bolt-on for Full & Final Transaction and the flown to Payroll
- Responsibility to Implement Payroll & Absence for USA, UK, South Africa, Japan, Netherland, France, Germany and Australia
- Done R & D in Payroll Interface at the time of Fit Gap to analyze base functionality of this modules and how this is best fitted in Patni business processes

Education:

- Master in computer Application, Indira Gandhi National Open University, Pune, India
- Bachelor of commerce, Mumbai University, Mumbai, India
- Diploma in Software Engineering HDSE Course from Aptech Computer Education

Sukhendra Garlapati

Peoplesoft Finance Technical Consultant

Skills

- Development Tools: Application Designer, People Code, Application Engine, Data Mover
- Analytic Tools: Process Scheduler, PS Query and SQLs
- Integration Tools: Component Interface, Excel to CI, File Layout, Integration Broker monitoring
- PS Functional knowledge: Project costing, Contracts, Billing, Payables, Purchasing
- Database Skills: Oracle 9i/10g

Project Experience

Client : Capco Financial Services, Chicago, USA
Title : PeopleSoft Finance & ESA Enhancements
Technology : People Soft Finance 9.1, People Tools 8.51, App Designer, Process Scheduler, Integration Broker, Oracle 10G

Description

Requirement is to implement the utilities and approvals for Business Operations.

Roles and Responsibilities

- Analyzing and structuring the enhancement requirements
- Implemented Workflow for General Ledger & Accounts Payable Modules
- Setting up Workflow based on Business Conditions
- Created several Inbound/Outbound Utilities for client needs

Project Experience

Client : Net Magic, India
Title : PeopleSoft ESA Implementation
Technology : People Soft Finance 9.2, People Tools 8.53, App Designer, Process Scheduler, Integration Broker, SQL Server

Description

Requirement is to implement ESA modules (Project Costing, Contracts and Billing) and Enhancement requests.

Roles and Responsibilities

- Requirement gathering for Module configuration and Understanding the Business Scenarios
- Suggesting the best way to implement and make it happen with minimal effort
- Handling Client Specific Customizations and Providing training on the end users for using system

Project Experience

Client : City Of Corpus Christi, Texas
Title : PeopleSoft ESA Support and Enhancements
Technology : People Soft Finance 9.0, People Tools 8.49, App Designer, Process Scheduler, Crystal Reports 9, Integration Broker, Oracle 10G

Description

Requirement to Provide Support to ESA modules and Enhancement requests

Roles and Responsibilities

- Analyzing and structuring the enhancement requirements
- Integration between Primavera System and PeopleSoft
- Creating Integration utilities between PeopleSoft and Primavera such Project Activity Integration and Project Expenses Integration between systems
- Setting up Workflow based on Business Conditions

Project Experience

Client : Aditya Birla Minacs, NA and India

Title : ESA Support & Enhancements

Technology : People Soft Finance 9.0, People Tools 8.49, App Designer, Process Scheduler, Crystal Reports 9, Integration Broker, Oracle 10G

Description

Requirement to Provide Support to ESA modules and Enhancement requests

Roles and Responsibilities

- Analyzing and structuring the enhancement requirements
- Adjusting the Crystal reports for Invoice print and Reprint to meet the business requirements
- Resolving tickets based on SLA
- Creating utilities application to support the invoice inputs process
- Designing and developing streamlined billing process through invoice inputs application
- Creating test plan and scripts for enhancements to meet the UAT
- Training new set of users on Implemented applications and making sure smooth transition

Project Experience

Client : Aditya Birla Minacs, Toronto, Canada.

Title : PeopleSoft ESA Implementation

Technology : People Soft Finance 9.0, People Tools 8.49, App Designer, Process Scheduler, Crystal Reports 9, Integration Broker, Oracle 10G

Description

Requirement to Provide Support to ESA modules and Enhancement requests

Roles and Responsibilities

- Actively involved in discussions with Client on gathering business requirements, structuring business requirements and proposing system solutions
- Performing Fit/Gap analysis and translating the business requirements to Functional/Technical design and architecture
- Involved in preparing Fusion ESA Functional Design and Technical Design documents
- Recommending better system solution for handling business processes on project costing, billing and accounting

- Performing Project Costing, customer contracts, Billing product configuration
- Streamlining the system process on handling the billing process for BPO business process
- Performing Time and Labor integration with Project Costing system to handle the reported time at the project charging level
- Modifying time sheet business functions to report time against the right project and right project activity based on the business conditions
- Creating brand new crystal reports for pro forma print, invoice print and invoice reprint function based on the specifications of invoice format and layout
- Creating AE's for generating xls format based billing report
- Creating Application package for handling Invoice inputs processing
- Configuring VAT for Canada provinces to handle charging VAT on customer invoices based on Canada VAT rules and regulations
- Performing Unit and Integration testing for the business functions to meet the desired results
- Preparing Training documents such as presentation documents, Job Aids and video based for each business functions

Education

B.Tech (IT), Malineni Lakshmaiah Engineering College, Singarayakonda

Abdul Latif Patan

Peoplesoft Finance Techno-Functional Consultant

Technical Skills

- Application Engine
- Component Interface
- People Code
- File Layout
- ExcelToCI
- PS Query
- PS Security, SQR, AWE, XML Publisher
- Application Packages
- Toad Oracle database and SQL Server

Functional Skills

- Account Payables
- Purchasing
- Travel & Expense

PROJECT EXPERIENCE

Client : County of NAPA
Technology : PeopleSoft FINANCE 9.1, People Tools 8.52

Roles and Responsibilities

- Creating Custom pages for Voucher and Vendor
- Doing configuration to push the data into Voucher and Vendor Components

Project Experience

Client : SkillSoft
Technology : PeopleSoft FINANCE 9.0, People Tools 8.51

Roles and Responsibilities

- Created a custom page to push the data from PO to AP
- Created the Approval flow using AWE for Requisitions
- Created custom Requisition and Purchase Order pages

Project Experience

Client : University of North Carolina
Technology : PeopleSoft FINANCE 9.1, People Tools 8.52

Roles and Responsibilities

- Created reports for PO, GL, and AM modules

Project Experience

Client : Lakshmi Vilas Bank

Technology : PeopleSoft HRMS 9.1, People Tools 8.51

Roles and Responsibilities

- Customized a SQR to change the format of the report
- Created a report to get the sum of various components of a salary for a pay cycle using XML Publisher
- Created a report to get the sum of various components of a salary for a location or for an employee using XML Publisher

Project Experience

Client : Internal

Technology : PeopleSoft Test FrameWork 8.52

Roles and Responsibilities

- Automated the manual test cases in FSCM91 for the modules like AP and Expenses using PeopleSoft Test FrameWork

Project Experience

Client : Waste Management, USA

Technology : People Tools 8.49, PeopleSoft FINANCE 9.0, People Tools 8.50, PeopleSoft HRMS 9.1

Roles and Responsibilities

- Giving application support and maintenance for Waste Management
- Customized an AppEngine to send an email to the Security admin whenever an Employee have invalid information
- Created Process Definition, Run Control Record and Page to run the batch program through Process Scheduler
- Developed a SQR to update the Supervisor for the employees whose current supervisor is terminated or in Leave
- Created a SQR to generate an Employee History report whenever an employee's job code, or description of job code is changed or whenever the employee is terminated or rehired/hired
- Customized a SQR and shell script as per client requirement
- Added fields to the existing record and placed those fields into the existing page
- Retrofitted a couple of SQR's
- Created test scenarios and also executed the same

Project Experience

Client : Jaguar and Land Rover

Technology : People Tools 8.44, PeopleSoft FINANCE 8.8

Roles and Responsibilities

- Giving application support and maintenance for Jaguar and Land rover
- Added people code to restrict the user to not enter the quantity/amount which is less than the current quantity/amount when voucher/receipt exists

- Commented delivered people code to enable the amount and ship to whenever the amount of a PO is totally received or partially received and made the quantity disabled when the PO line is Amount only
- Customized a SQR to generate a report whenever an Employee relocated to another location
- Created run control table, page, component and process definitions to run a couple of SQR's through Process Scheduler for a particular period
- Developed Application Engine Process do Inbound and Outbound using Filelayout
- Preparation of Document for the TDD, UTP document

Project Experience

Client : Verizon Data Services, India.

Technology : People Tools 8.49, PeopleSoft FINANCE 9.0

Roles and Responsibilities

- Used People Code to control the program flow, business logic and for validations to meet the current business requirements
- Modified book people code to validate the particular book that has been changed
- Created an AppEngine to insert data into database from the flat file
- Created Process Definition, Run Control Record and Page to run the batch program through Process Scheduler
- Read data from flat file and updating the Tables using Application engine
- Developed Run Control Pages as per requirements for running AE and SQR programs

Education

B.Sc. (Computer Science) - 2007, from GC & YPN Degree College.

Kumara Vela K.P

Peoplesoft Administrator

Skills

- PeopleSoft Tools: PT 8.49, 8.50, 8.51, 8.52, 8.53
- PeopleSoft Application: HRMS, FINANCE and CRM,
- Operating systems: Solaris 10, Linux, AIX, Windows 2008R2,
- RDBMS: Oracle 10g, 11g, SQL SERVER 2005, 2008, 2012
- Third party Tools: BEA Tuxedo, BEA WebLogic
- Tools/Utilities: FTP, TOAD, EXP, IMP, SQL Loader, SQL Plus

Project Experience

Client : Wellpoint
Technology : PeopleSoft 849, 853, Oracle, Third party tools, HRMS9
Project : Peoplesoft upgrade project

Roles and Responsibilities

- Application upgrade from 8.9 to 9.2
- Tools upgrade from PT849 to PT853
- Configuring and running the upgrade template
- Resolving the issue regarding to upgrade
- Creating non production environment required to upgrade
- Supporting retrofitting team after upgrade

Project Experience

Client : Howard (onsite)
Technology : PeopleTools 8.52, FSCM 9.1, Hrms9.1, Portal9.1
Project : Peoplesoft Support

Roles and Responsibilities

- Performed MP activity on both FSCM and HRMS
- Performance tuning of PeopleSoft environment and Oracle databases
- Worked on Foglight
- Monitoring and troubleshooting app, web and process server issues
- Involved in projected migration between DEV/QA/PROD
- Coordinates and implements changes to development, test, and production environments

Project Experience

Client : DLzp
Technology : PeopleSoft 853, Oracle, Third party tools, FSCM9, HRMS9
Project : Peoplesoft support on Amazon

Roles and Responsibilities

- Implementing PeopleSoft environment on Amazon

- Resolving the issues raised in Amazon
- Supporting the developer resolving the issues raised in Amazon
- Shell scripting

Project Experience

Client : Wellpoint
 Technology : PeopleSoft849, 853, Oracle, Third party tools, HRMS9
 Project : Peoplesoft upgrade project

Roles and Responsibilities

- Application upgrade from 8.9 to 9.2
- Tools upgrade from PT849 to PT853
- Configuring and running the upgrade template
- Resolving the issue regarding to upgrade
- Creating non production environment required to upgrade
- Supporting retrofitting team after upgrade

Project Experience

Client : Howard
 Technology : PeopleSoft849, Oracle, Third party tools, FSCM9, HRMS9
 Project : Howard support and application upgrade project

Roles and Responsibilities

- Application upgrade from 8.9 to 9.2
- Tools upgrade from PT849 to PT852
- Applied PeopleTools MP's
- Performance tuning of PeopleSoft environment and oracle databases
- Creating of new COP environment for application upgrade
- Monitoring and troubleshooting app, web and process server issues
- Involved in projected migration between DEV/QA/PROD
- Coordinates and implement changes to development, test, and production environments

Project Experience

Client : Aditya Birla Minacs, Leading Call center, Bangalore.
 Technology : PeopleSoft849, Oracle, Third party tools, FSCM9, HRMS9
 Project : Aditya Birla Minacs Support Project

Roles and Responsibilities

- Moved from Oracle 10g Enterprise edition to standard edition
- Worked on revamping the PeopleSoft environment
- Involved in Oracle/PeopleSoft database refreshes
- Applied PeopleTools MP's
- Performance tuning of PeopleSoft environment and oracle databases
- Involved in gathering stats and rebuilding indexes on demand by developers
- Monitoring and troubleshooting app, web and process server issues

- Involved in projected migration between DEV/QA/PROD
- Coordinates and implement changes to development, test, and production environments

Project Experience

Client : National Stock Exchange, Mumbai
 Technology : People tool 8.51, HRMS9.1, Oracle 10g
 Project : NSE Implementation Project

Roles and Responsibilities

- Implemented the PeopleSoft architecture for both HRMS
- Resolved the issues that were present after implementation
- Applied bundles, MP and patches after the implementation to upgrade the system and resolve the bugs
- Involved in working closely with development team to implement the modules during the Go LIVE
- Involved in Oracle/PeopleSoft database refreshes
- Involved in gathering stats and rebuilding indexes on demand by developers
- Monitoring and troubleshooting app, web and proc server issues
- Involved in projected migration between DEV/QA/PROD
- Involved in clearing cache for web, app and proc servers on demand

Project Experience

Client : Aditya Birla Minacs, Leading Call center, Bangalore
 Technology : PeopleSoft849, Oracle, Third party tools, FSCM9, HRMS9
 Project : Aditya Birla Minacs Support Project

Roles and responsibilities

- Worked on revamping the PeopleSoft environment
- Resolving the issues that were arising on related to performance of the environment
- Involved in Oracle/PeopleSoft database refreshes
- Applied PeopleTools patch 32 and MP's
- Performance tuning of PeopleSoft environment and oracle databases
- Involved in gathering stats and rebuilding indexes on demand by developers
- Monitoring and troubleshooting app, web and proc server issues
- Created a demo and MP environment
- Involved in projected migration between DEV/QA/PROD
- Involved in Creating Oracle users, roles, synonyms, DB links etc.
- Coordinates and implement changes to development, test, and production environments
- Involved in clearing cache for web, app and proc servers on demand

Project Experience

Client : Asurion, USA.
 Technology : PeopleSoft and SQL server support
 Project : Asurion Support Project

Roles and Responsibilities

- Project migration between DEV/QA/PROD
- Installation and configuration of GPG third party for file encryption
- SQL Server/PeopleSoft database refreshes
- Worked on integrating new node and certificates along with developer
- Backup of database
- Applying MP, tax updates on DEV/QA/PROD
- Resolving cases on test director and remedy tickets
- Rebuild indexes on demand by developers
- Coordinates and implement changes to development, test, and production environments
- Monitoring and troubleshooting app, web and proc server issues
- Clearing cache for web, app and proc servers on demand
- Involved in executing DMS and SQL scripts on demand from developers
- 24*7 on call support for all application related issues on rotation basis

Project Experience

Client : Okuma, Machine tool manufacturing company, USA

Technology : PeopleTools Upgrade and Oracle Upgrade, Oracle 10gR1, HP-UX 11i, Windows 2003 R2, People tools 8.47, CRM 8.9

Project : Okuma, Upgrade Project

Roles and Responsibilities

- Planning and designing Oracle and People Tools upgrade plan
- Setting up upgrade infrastructure for Oracle and People Tools upgrade
- Gathering requirement and fit gap analysis for Hardware\Software required for upgrade
- Gathering information on patches and bundles required for upgrade
- Upgrading People Tools from PT847 to PT850.05
- Upgrading oracle from 10.1 to 10.2.0.4
- Resolving and retrofitting the issues as reported during upgraded passes
- Escalating and coordinating issues with Oracle Support
- Upgrading \Setting up Integration broker
- Enabling the remote search and the forget password link
- Post upgrade support and configuration
- End to End testing from PeopleSoft environment perspective.

Project Experience

Client : AAA - American Automobile Association, USA.

Technology : People tools 8.47 & 8.50, Tuxedo 8.1 & 10gR3, BEA Weblogic 8.1 & 10.3.1, HRMS & FSCM 8.9

Project : AAA - American Automobile Association, Upgrade Project

Roles and responsibilities

- Gathering requirement and fit gap analysis for Hardware\Software required for upgrade
- Upgrading PeopleTools from PT847 to PT850.05
- Resolving and retrofitting the issues as reported during upgraded passes

- Escalating and coordinating issues with Oracle Support
- Upgrading \Setting up Integration broker
- Installing PT850 People-books with HR & FSCM 8.9
- Post upgrade support and configuration
- End to End testing from PeopleSoft environment perspective

Project Experience

Client : IIM Shillong
 Technology : PeopleSoft849, Oracle, Third party tools, FSCM9, HRMS9
 Project : IIM Shillong, Implementation Project

Roles and Responsibilities

- Implemented the Peoplesoft architecture for both HRMS and FSCM
- Resolved the issues that were present after implementation
- Applied bundles, MP and patches after the implementation to upgrade the system and resolve the bugs
- Involved in working closely with development team to implement the modules during the Go LIVE
- Involved in Creating Oracle users, roles, synonyms, DB links etc.
- Involved in Oracle/PeopleSoft database refreshes
- Involved in gathering stats and rebuilding indexes on demand by developers
- Monitoring and troubleshooting app, web and proc server issues
- Involved in projected migration between DEV/QA/PROD
- Involved in clearing cache for web, app and proc servers on demand

Project Experience

Client : Bank of India, Mumbai
 Technology : Oracle 10g, HP-Unix 11i, Windows 2000, People tools 8.48, Tuxedo 8.1, BEA Weblogic 8.1, Finance 8.9
 Project : Bank of India, Support Project

Roles and Responsibilities

- Install Oracle and Peoplesoft instance on HP-Unix 11i for development and QA
- Configure archiving and RMAN setup with recovery catalog for production servers for backup and recovery
- Performance monitoring of oracle database using various tools like STATSPACK and monitoring scripts
- Day to day Support to all PeopleSoft finance modules implemented, support PeopleSoft HRMS Modules implemented
- Install PS Software, configuration/re-configuration of process scheduler, application server, web server and creation of new instance
- Handle all Server related problems like process scheduler, application server, web server etc.
- Handle all oracle database related problems
- Maintenance of Development, test and Production systems. Day to day activities will include trouble-shooting problems, performance tuning, capacity planning, architecture and migrations
- Plan and manage the installation of application patches and releases on development, test and

production systems

- Handle other day to day issues along with <Vendor> Techno-functional person and HPUnix Administrator
- Provide technical administration and migration support for PeopleSoft development, test and production environments
- Configure monitoring tools to evaluate the performance of systems
- Manage and tune application servers, web servers for PeopleSoft environments

Education

Bachelor's of Engineering, Bangalore University, Karnataka.

Keyur Makwana

Lead DBA

Skills- Functional – Oracle DBA

Project Experience

Client : Time Warner Cable
Title : Oracle DBA

Description

Database Support

Roles and Responsibilities

- Managing more than 300 10g, 11g RAC production/Dev/QA clusters with 25TB database sizes on various platforms like Linux, Solaris, AIX
- Implementing upgrade strategies for RAC and Non RAC databases
- Preparing and performing upgrade for RAC and non RAC databases/ CRS from 10g to 11g Release 2
- Building new clustered as well non clustered databases as per the standards set by the team
- Building logical standby, upgrade to 11g with 10g primary to lessen downtime for critical production databases
- Experience in OEM 10g, 11g and 12c grid control agents like installation, configuring targets etc
- Troubleshooting CRS and Database issues in RAC and non RAC environment
- Raising issues with Oracle supports for cluster, ORA 600, standby hang etc, constant follow up, implementing in dev/qa/production environment after co-ordination with application team
- Best practices documentation for ASM, RMAN and implementing them in production environment (like putting crsctl diag wait, multiplexing voting disk and ocr, I/O multipating, Listener to listen on VIP, ntp -x on all Cluster nodes on AIX etc.) on all RAC clusters on various platforms and implementing platform related RAC practices (in progress)
- Troubleshooting backup failures, diagnosing net backup log files and suggest possible solutions
- Suggesting various recovery scenarios for manual failures like table drop, tablespace drop, non system datafile drop
- Day to day issues/alerts resolution for 250 Production/DEV/Staging clustered and non clustered databases
- Attending incident bridges for any production issues and working with app team to solve the issues at earliest
- Daily monitoring through scripts, OEM Grid control 11g and 12c and resolving the alerts within SLA time as per criticality of the issues and application
- Documenting new processes and updating existing process standards related to Database build, Backups, RAC and non-RAC cluster upgrades
- Helping internal customer to setup new app environment

Project Experience

Client : ACOM Bank, Japan
Role : Team Lead – Disaster Recovery

Roles and Responsibilities

- Implementation of 10g RAC on AIX 5.3 for Powercard application
- Performing High Availability testing like EVMD failure testing, OCLSOMON failure testing, OPROCD failure testing, RACGIMON failure testing
- Performing system testing like OCR failure, voting disk failure, system tablespace failure, All disk failure at one side and both sides(mirror side also), data group failure, redo log failure,
- Performing Transaction processing testing while PMON failure, Listener failure, CRS daemon failure, CSS daemon failure, Node failure
- Documenting failure test case scenarios and expected behavior
- Change enhancement with co-ordination with IBM and oracle at entire system level
- Designing optimal Disaster recovery strategy using Data guard and Implementation of DR plan

Project Experience

Client : Nissan North America Inc (Onsite DBA support in Nashville, USA)

Roles and Responsibilities

- Handling 250 databases including production, development, QA
- Checking success of RMAN database backup to tape
- Reactive tuning of database, user queries as per request
- Suggesting approaches for implementation of 10g RAC and 10g RAC with dataguard depending on criticality of database
- Checking Space, allocating space and estimating future requirements
- Reviewing TARs, Updating and implementing solutions as suggested by Oracle
- Implementing changes as suggested by application developers at schema level
- Statistics gathering and Reviewing performance on a regular basis from STATS PACK reports that identifying problematic areas, monitor the performance overall
- Export-import at schema level of some users
- Moving data from one database to another for testing
- Managing user privileges, profiles and security administration

Project Experience

Client : New York Stock Exchange CIF (Support from Pune)

Roles and Responsibilities

- Checking Alerts on the production as well as development database (47TB) and taking corrective measures.
- Checking space and adding space in the database
- Defining Statistics generation strategy and implementation for production database
- Reviewing TARs and patching to the database
- Monitoring Data loading , taking corrective actions for failed tables, Suggesting Alternative approaches for faster loading

- Tuning Long running queries and suggesting alternative approach
- Reviewing AWR reports and implementing recommendations
- ASM rebalancing and space allocation(adding disks to diskgroups)
- Statistics generation
- Export-Import of schema from production into development as per User request.
- Creation of new schema and user objects as per User request for testing in development (10.2.0.1.0)
- Database creation on higher version for testing

Project Experience

Client : ADP

Roles and Responsibilities

- Resizing tablespaces for indexes and data
- Loading the data from flat files to oracle 10g
- Scheduling snapshots for AWR and analysis of report
- Tuning SQL statements while comparing execution of same statements in InterBase.
- Oracle server tuning by adjusting initialization parameters to achieve desired performance goals
- Implementing and configuring Oracle 10g RAC on RHAS3

Project Experience

Client : Sun Pharma

Roles and Responsibilities

- Installation of Red Hat Advanced Server 3 and oracle 10g on RHAS 3 and documentation of installation procedure
- Installation of 9.2.0.1 and patch for 9.2.0.4 on RHAS 3, Installation of RHAS 3
- Creation of database and configuring various options(in 10g and 9.2)
- Taking export backup on production server
- Formulation of new backup strategy for production server using RMAN
- Supporting users for different databases at different locations all over India
- Performing recovery of databases at failed locations
- Supposed to implement 10g RAC on HP-Ux 11i Itanium server and preparation the document for 10g RAC
- Periodical performance check of the databases.(the largest size is 260GB)

Project Experience

Client : Larsen &Toubro

Role : Database Administrator

Roles and Responsibilities

- Installation of oracle 9i on Windows 2000,Unix
- Supporting 40 GB,25 GB production databases
- Supporting 300 users and 100 concurrent users
- Establishing and maintenance of 24 X 7 need of database
- Oracle Server & Client Installation

- Tuning queries using Explain Plan, Statspack
- Deciding on Logical Structures such as Table spaces, Segment size
- Monitoring and maintaining long running jobs
- Performing incremental backup every day and weekly full online backup through scripts
- Maintaining Network Administration
- Checking space usage, adding space and segregating large objects into separate table spaces
- Recovering backup of production databases on other server for testing of recovery

Project Experience

Client : Thermax Chemicals

Roles and Responsibilities

- Establishing and maintenance of 24 X 7 need of database
- Supporting 3 production databases on Windows 2000, Unix
- Supporting 50 users
- Oracle Server & Client Installation for test purposes
- Tuning instance and memory structures
- Performing online full backup every day
- Performed routine checks of space utilization and free space in Tablespaces and disk fragmentation
- Implementing standby database for one database

Project Experience

Client : Biostar Pharmaceuticals

Roles and Responsibilities

- Oracle Server & Client Installation
- Supporting 2 production databases on Windows NT, Unix
- Supporting 30 users
- Tuning queries using Explain Path, TKProf
- Performing offline full backup weekly and generating archive logs on two different servers
- Performing network connectivity through Hostnaming
- Performing weekly logical backup for some users

Project Experience

Client : ISRC Pune

Roles and Responsibilities

- Taking backup through database maintenance wizard
- Supporting 12 servers on Windows 2000
- Supporting 70 developers
- Tuning and helping the developers to write efficient SQL procedures, triggers and SQL Statements
- Performing centralized control for creation of objects in the databases

Education BBA + PGDip in Software Engineering and Management

Manish Kumar

Peoplesoft Database Administrator

Skills - Core Oracle Database Administration 11g,10g,9i and 8i with RAC & Data guard. (Having more than 6 months of onsite-uk-experience)

- Oracle 11g, 10g , 9i , 8i,
- Microsoft SQL SERVER 2005 and MySql,
- AIX 5.3,SUN OS 5.9 ,
- HP-UX 11.31, Linux & MS Windows

Project Experience

Client : Time Warner Cable Inc. (USA)

Project : 24*7 Oracle Production Support (Real Application cluster 10.2.0.4, 10.2.0.5 and 11.2.0.4 on AIX, Sun Solaris and Linux)

Project Experience

Client : British Telecom (UK)

Project : Database Upgrade (from 8i, 9i (RAC & Physical Standby) to 10.2.0.4 , 11.1.0.7 Applying Patch Set and Interim Patch
Oracle client Upgrade from 9.2.0.8 to 10.2.0.4
Installation and configuration of CRS and ASM.
OS->SUN SPARC 8,9,10
HP-UX and AIX

Roles and Responsibilities:

- Installation of Oracle Server and client on AIX, Linux & Window
- Database Creation and Configuration
- Maintenance and Administration of Database
- 7htCreation and Space Management of Tablespace
- Configuration and Management of RMAN backup and recovery
- Configuration of Flashback Technology in 10g Database
- Installation, Configuration and Migration of 10g databases on 11g ASM instance
- Change Ticket Process through Footprint
- Checking the Daily Backups Logs
- Exp/Imp & Expdp/Impdp
- Database refreshes using RMAN
- User Management
- Upgradation and Migration of Databases
- Performance and Tuning of Initialization Parameter of Database
- Pro-Active Database Administration
- Maintaining Good Co-ordination within the Team
- RAC, Data Guard and Standby Server

Education

MCA (Master of Computer Application)

Mrugank Shah

Sr. Consultant, Oracle Database

Skills

- Oracle 8/8i/9i/10g
- Solaris, Linux, AIX, Windows
- TOAD, Keep Tool, Jboss, 10g AS
- Remedy Support
- Mercury Test director

Project Experience

Client : Times Warner Cable, USA

Project : Production Database Support

Role and Responsibilities

- Extensively worked in a 11gR2 RAC environment with 2 to 7 nodes
- Documented and implemented the cloning of the oracle 10g database with the help of RMAN
- Design the RMAN backup strategy implementation plan for the oracle databases
- Managing around 600+ oracle databases remotely
- Managing a L1 and L2 team of oracle database production support
- Experience with new and emerging database computing technologies 11g R2 , RAC, Data Guard, ASM
- Data Pump and Oracle Enterprise Manager (OEM 10g) including Grid Control
- Experience working with Flashback, Flash Recovery Area (FRA)
- Knowledge of Product Support for Application and Database Deployment of Upgrades and Patch Release
- Extensive On-call production support experience
- Assisting/Directing team in resolving the production issues
- Work independently or Within a Team
- Involved In Analysis, Design, Documentation, Creating Databases, Preparing Backup Strategies And
- Integrity Methods and Tuning The Database Performance Using Oracle And Third Party Tools
- Worked on the ticket monitoring software Remedy

Project Experience

Client : Fortis Bank, New Jersey

Roles and Responsibilities

- Configuration of Oracle Database 9i/10g For Data Warehouse Applications
- Suggested architecture for RMAN backup strategies and Cluster Technology
- Documented the Architecture for Cluster Environment and RMAN Backup Strategies
- Database upgrade from Oracle 9.2.0.4 to 9.2.0.7 for multiple instances
- Implemented RMAN Backup strategies with the RMAN controller
- Implemented automated cold and hot backup process
- Performance tuning for Data Warehouse Application

Project Experience

Client : Government of Gujarat
Project : Database Setup And Management For E-Governance (ERP)

Roles and Responsibilities

- Installation/Migration of Oracle Database
- Create and Configure the Database for More than 10000 Users.
- Planned, implemented and Documented the Backup & Recovery strategy
- Capacity planning for future growth of the database
- Database Security Policy deployed
- Written scripts to automate the process of backing up the databases
- Writing Stored Procedures, Trigger, Functions for Application and Administration Purposes
- Performance Tuning and optimization
- Install and Configure Oracle 9i Application Server

Project Experience

Client : Benchmark Inc.
Project : Payroll System
Technology : Visual Basic 5.0 & Oracle 7.3

Description

System developed for accounts department. This s/w keeps the record for employee salaries, joining date region wise. It also generates the salary slip for each employee, also having the facility for backup

Roles and Responsibilities

- Responsible for report generation

Project Experience

Client : Benchmark Inc.
Project : Hotel Management
Technology : Visual Basic 5.0 & Ms-Access'97

Description

System developed for complete hotel management which different modules like front office, room booking, banquets, restaurant, housekeeping and inventory.

Roles and Responsibilities

- In this project I am responsible for front office module and room booking module. In these modules it gives the availability of rooms, package charges, booking of rooms etc. also responsible for the reports related to this module

Education

Bachelors in Science (Electronics)

2. SMARTERP SKILLSETS

SmartERP resources possess most of the skills required by University of Central Florida.

With over 250 resources at our disposal, we can typically handle our engagements and provide quality resources to augment most skillsets. We would rarely use a subcontractor in our engagements. The only reason would be if there is a niche area of expertise our core team lacks; for example, Commitment Control within the University System is a unique area where we might consider complementing SmartERP resources.

Skillset	SmartERP Capability	Use of Subcontractors?
PeopleSoft Campus Solutions	Yes	Subcontractors may be used in few niche cases
PeopleSoft HCM	Yes	No
PeopleSoft Financials	Yes	No
PeopleSoft CRM	Yes	Subcontractors may be used in few cases
Interaction Hub	No	Yes
PeopleSoft and Database Administration	Yes	No
Mobile Web Development	No	Yes
Analytical Tools (OBIEE/Hyperion)	Yes	No

C. CONSULTING SCOPE AND COST TO UNIVERSITY

1. OUR UNDERSTANDING OF SERVICES REQUIRED BY UNIVERSITY

The University of Central Florida is seeking assistance in Implementation, enhancement, support and upgrades of PeopleSoft Applications in the following areas:

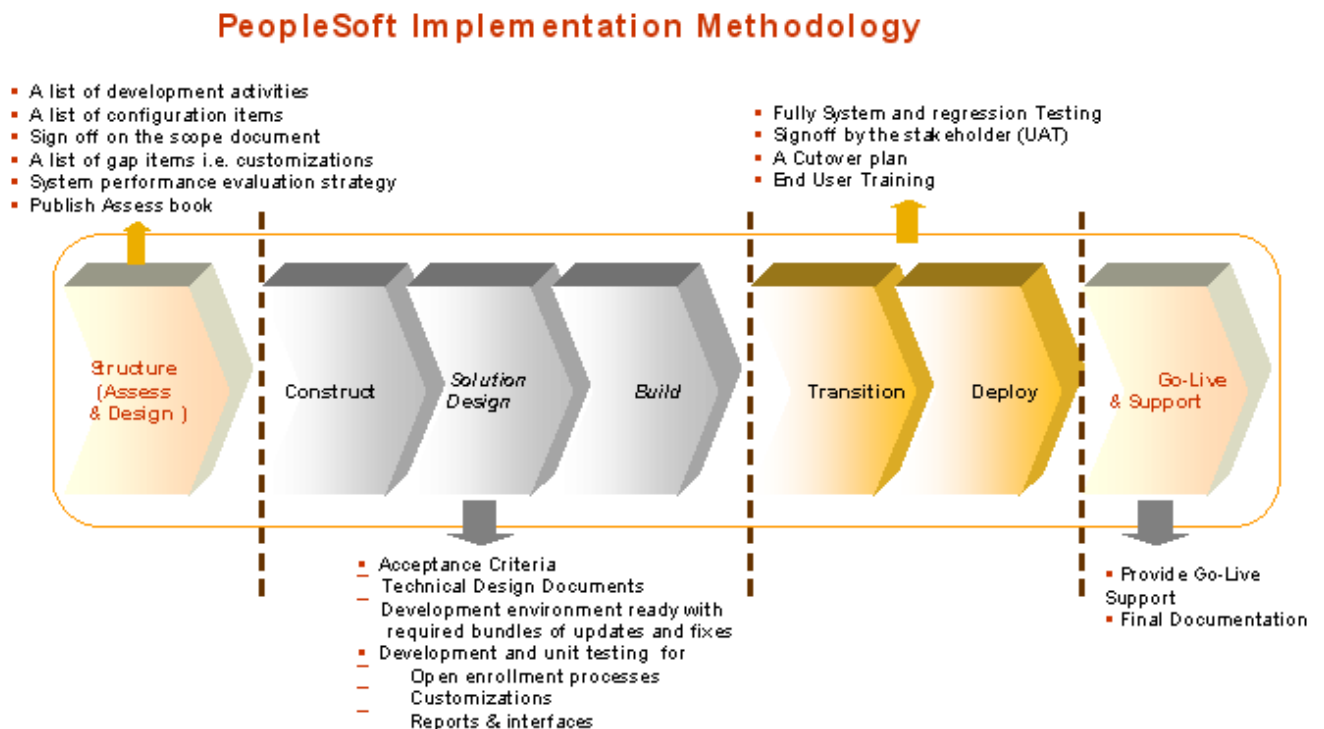
- PeopleSoft Campus Solutions
- PeopleSoft Human Capital Management
- PeopleSoft Financials
- PeopleSoft CRM
- Interaction Hub
- PeopleTools 8.52 and higher
- Academic Advisement
- Mobile Web Development with integration to PS and BI
- PeopleSoft and Database Administration

2. SMARTERP METHODOLOGIES

One of the strongest differentiators between SmartERP and our competition is the quality of our professionals and our ability to consistently meet or exceed the project objectives through efficient delivery of innovative solutions. Our professionals focus on knowledge transfer, training, and ultimately self-sustainment beginning from day one. We encourage joint project partnership on our projects with our clients with the objective of achieving knowledge transfer and training during the project. SmartERP has a proven track record of providing leadership, facilitation, and design of business processes. We have helped numerous clients analyze, design, and improve their business processes. Our approach is to facilitate, rather than dictate, all processes by working closely with our client's teams to ensure that the most appropriate solutions are always implemented. We have a proven methodology that draws on the strengths of SmartERP consultants and our clients to form an effective team and a cost effective solution.

SmartERP Methodologies provide a deliverables-based, best practices framework to guide projects to successful completion. Our methodologies are an effective approach that speed the implementation process, accelerate knowledge transfer, and facilitates the documentation of business process decisions. They provides a consistent, cohesive and logical combination of processes, tools and documentation to enable the enterprise to transition to an integrated ERP environment.

2.1 PEOPLESOFT IMPLEMENTATION METHODOLOGY



1. **Strategy & Planning (Structure):** In this phase SmartERP will deploy resources onsite who will work in collaboration with the customer team. The resources responsibility would be to define overall strategy, finalizing the approach to the suggested solution, define the re-configuration of the tables, customizations, integration, and reports, interfaces and data conversion. Any gaps that may exist between the 'Out of the Box' module and the business requirement will also be defined and documented.

Deliverables –

- Project Plan
 - A list of development activities
 - A list of configuration items
 - Sign off on the scope document
 - A list of gap items i.e. customizations
 - Product Fitment Report
2. **Construction - Design:** During this phase, the approved development items such as reports, interfaces, customizations and data conversion will be designed, documented, reviewed and approved. The Sr. Consultant, Functional & Technical Consultant will develop a design for each

work unit that meets the project requirements. During this phase – Patches & fixes team will apply all the required bundles to get the development environment up to date.

Deliverables –

- UAT Acceptance Criteria
- Technical Design Documents
- Development environment ready with required bundles of updates and fixes

3. **Construction – Development:** During this segment, any agreed upon reports, queries, customizations, interfaces, and conversion programs will be developed and unit tested.

Deliverables –

- Development and unit testing of all open enrollment processes, customizations, reports, interfaces, and conversion programs identified as in scope
- Prototyping / User Walkthrough of the system as and when configuration and customization is complete before the start of transition phase. SmartERP and Client will jointly review the User Feedback from the prototyping session and will incorporate the same back in the system as deemed necessary.

4. **Transition -** During this phase the team will deliver a working and tested solution. Complete system and regression testing will be done to ensure that all benefits related processes are executed as per plan. Key users will test Solution Design setups and all customizations and interfaces. The result of this segment is a fully functional and approved business solution. A cutover strategy and contingency plan will be defined.

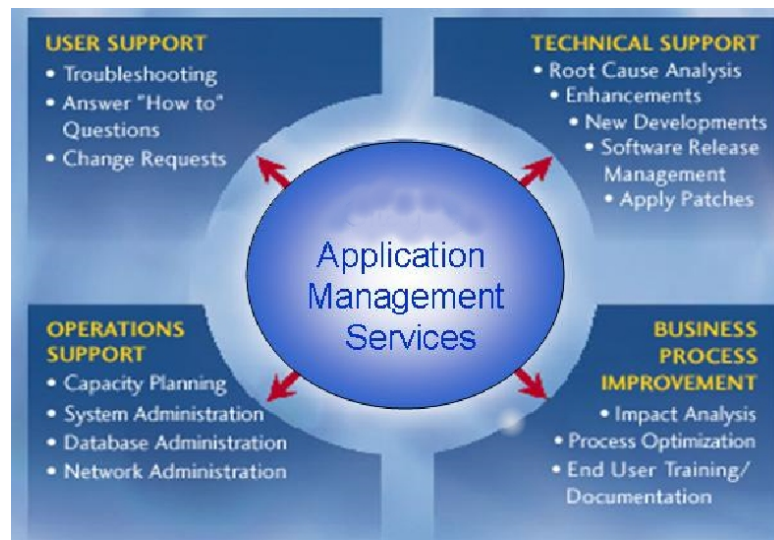
Deliverables –

- Fully System and regression Tested and Approved Solution (processes, reports, queries, integration and customizations)
- Signoff by the stakeholder (UAT)
- A Cutover plan
- Contingency plan

5. **Deploy -** System will go live during this phase. SmartERP will provide support during OE window and post production support through the end of December.

2.2 PEOPLESOFT SUPPORT METHODOLOGY

SmartERP adopts a 3-step process towards solution approach. Solution approach begins with a pre-assessment questionnaire, which is sent to our customers to understand existing Application environment, followed by a robust Assessment Methodology. The Solution Presentation concludes the Solutions Approach, which includes the information gathered during Assessment and proposed support options, Resource and Transition plans, pricing configuration etc.



1. **Operations Support** - SmartERP's Operations Support can cost-effectively and efficiently manage client's infrastructure. We can assist companies in ensuring that the capacity of the company's network, systems and databases keep pace with user demand or we can assume full responsibility for the administration of company's network, systems and databases. Whether the company is running on a HP-Unix, IBM-AIX or NT operating system or Oracle, Informix, SQL Server database, our experienced Operations Support specialists provide the capacity planning, and network, system and database administration expertise to significantly increase the overall effectiveness, reliability and scalability of the client's infrastructure investment while reducing the overall cost of maintaining it.
2. **Functional Support** - When companies have questions about or problems with their applications environment, SmartERP's technical support specialists provide dependable and timely resolutions to users' questions and problems. Whether it is a new business requirement, customization support or

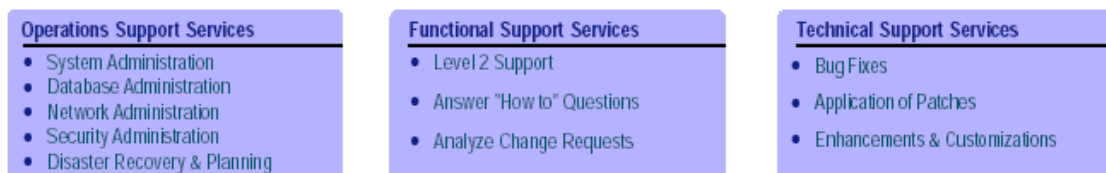
troubleshooting support, SmartERP has the process and application expertise to ensure that questions and issues are captured and quickly addressed to reduce direct support costs, minimize the loss of user productivity and make support a competitive asset.

SmartERP delivers high quality, 24 x 7 troubleshooting, and onsite or offsite Help Desk and Change Request support. To ensure that the client's problems are resolved quickly, every inquiry is tracked and managed through our web-based trouble ticketing system. Our comprehensive Service Levels deliver improved accessibility and quick and "hassle-free" responsiveness to give end-users greater efficiency and improved productivity.

3. **Technical Support** - When clients require changes to their mission-critical applications, such as building new enhancements, applying patches or deploying a software release, SmartERP can simplify the continuous improvement of the client's application environment... while reducing total application maintenance costs.

SmartERP has the skilled technical professionals, processes and tools that enable clients to rapidly and cost-effectively extend and maintain their application environment.

Our team of technical professionals has deep industry application and domain experience to provide fast turnaround and reduced cycle times. The processes and tools that we use drastically reduce errors, minimize rework, prevent application downtime and streamline the delivery of new enhancements, patches and software releases. SmartERP delivers the Technical Support expertise, processes and tools to accelerate clients' time to market.



SmartERP provides **level 1, 2 and 3** support services. Level 1 support is provided by SmartERP's proprietary tool, wherein a user can find answers to their queries interactively on the Internet. Historically, this has led to reduction of problems directed to the level 2 and level 3 by 40%. In case the problem is not resolved at this level it is escalated to the support team (level 2 support). If there is a further requirement of problem resolution and a need of consultant involvement is felt at the customer site or consultant having an access to the customer systems, the same is carried out as per the agreement entered into by the customer and SmartERP.

2.3 UPGRADE METHODOLOGY

SmartERP Upgrade Methodology is an agile, scalable, focused, efficient and cost-effective implementation approach, which guarantees an open and candid dialogue during all stages. The methodology is designed to encourage strong client involvement and promote knowledge transfer every step of the way. This methodology uses the best practices, samples, templates and techniques learned from our team's decades of collective experience; it is rooted in both the Project Management Institute's Project Management Body of Knowledge and PeopleSoft's Compass Methodology. Our Methodology will establish a strong project management foundation to help deliver your project on time, in scope and at budget.

SmartERP Methodologies provide a deliverables-based, best practices framework to guide projects to successful completion. Our methodologies are an effective approach that speed the implementation process, accelerate knowledge transfer, and facilitates the documentation of business process decisions. They provides a consistent, cohesive and logical combination of processes, tools and documentation to enable the enterprise to transition to an integrated ERP environment.

HIGH-LEVEL SAMPLE TECHNICAL PLAN FOR UPGRADE TO 9.2

When the Fit-Gap Analysis Process is in progress, the Technical Upgrade Team begins the analysis and assessment for the technical upgrade process. The first requirement is to identify an accurate assessment of customizations in the 9.0 production environment. With the customization details in hand, and the Fit-Gap Analysis process, we should be able to determine the disposition of the customizations, including dropping, carrying forward, reworking, or creating new customizations.

In continuing the process, the next phase involves key technical tasks and scripts necessary to upgrade your PeopleSoft applications to 9.2. The upgrade process is executed in an iterative fashion with multiple upgrade passes to ensure completeness and accuracy. Our Technical Upgrade Specialist leads the execution of this part of the Upgrade Process from start to finish. It starts with an Initial Pass of the technical upgrade and completes with a final upgrade pass which will be your Final Move to Production. Each iterative pass is an opportunity for the University's business users to verify the new release meets their business requirements and objectives for upgrading to 9.2.

PREPARING THE ENVIRONMENT AND TECHNICAL CONFIGURATION

As part of preparing for the upgrade to 9.2, an assessment of the University's environment will be performed (as stated in the Scope of Work). This assessment will include the compatibility of the current technical infrastructure (hardware, software, database, and network) with Release 9.2. SmartERP will review the University's current infrastructure to assess the compatibility of the environment with HRMS Release 9.2 requirements working with the latest version of PeopleTools, .53.. SmartERP's Senior Infrastructure Analyst will work with the University's Infrastructure team in this process to identify any pain points and generate a report documenting these hardware requirements along with any additional infrastructure needs. Review and analysis will include hardware, software, database and network.

Upgrade Moves - The PeopleSoft 9.0 to PeopleSoft 9.2 upgrade at the University could be accomplished in four (4) upgrade moves. Each of the upgrade moves is described below.

Initial Pass

The first major phase in the upgrade process is the **Initial Pass**. In this phase, with input from the University's project team, SmartERP performs an upgrade of a copy of the University production database to PeopleSoft 9.2, creating an environment that is referred to as the 9.2 Initial Pass. The **Initial Pass** is the most labor intensive phase, as all customizations currently in the University's existing environment are reviewed and reconciled to determine if the customizations need to be retrofitted in PeopleSoft 9.2. The results of what customizations to carry forward into Release 9.2 will be the result of the Fit-Gap Analysis Process done at the beginning of the project. This phase is typically estimated to take 8 weeks.

Technical Summary of the steps involved:

1. **Prepare the Database:** We shall ensure the functional and Technical integrity of database, with the help of the respective Audit Reports delivered in the certified path.
2. **Apply People Tools Changes:** This activity involves the execution of Rel (New Release) scripts so as to perform tools upgrade to 8.53.
3. **Apply Application Changes:** Copy the set of 9.0 Object definitions to Target i.e. Copy of production database. Apply the Upgrade Bundles for Data conversion and Perform Data Conversion for the certified path.
4. **Finalizing the Database Structure:** Execute the Scripts to Load Application Data, Run the Final Audit Reports to Ensure Integrity in the Upgraded instance.
5. **Complete Database Changes:** Configure the Application server and Web server for the Upgraded instance and setup the PIA. Setup and Synchronize the Security.
6. **Testing the Upgraded Instance:** Test the Upgraded Instance thoroughly.

Test Move #1

The second phase in the upgrade process is Test Move #1. The source for this move is the "9.2 Initial Pass". In this phase the team upgrades a new current copy of production 9.0. The timeframe for this test move is estimated at 6 weeks. The upgraded database resulting from this test move (TM1) serves as the new development, unit test environment for the technical team, and as the source for Test Move #2. Unit testing for Test Move #1 is performed by SmartERP resources and the University's IT Team.

Test Move #2

The third phase in the upgrade process is Test Move #2. In this phase our team once again completes the upgrade process on a new current copy of production 9.0. The upgraded database (TM2) resulting from this test move serves as the source from which the new development unit test environment is copied, as the system/integration test environment, and as the source for Test Move #3. System testing for Test Move #2 is performed by the University IT and Subject Matter Experts (SMEs) over a period defined by the University's business owner. Issues identified in the testing process for Test Move #2 are corrected and resolved before the next Test Move.

Test Move #3

We continue with performing test moves to test the upgrade process and insure the expected results are achieved with the upgraded new 9.2 release. Test Move # 3 is similar to Test Move #2. System testing for Test Move #3 is performed by the University IT and Subject Matter Experts (SMEs) over a period defined by the University's business owner. Issues identified in the testing process for Test Move #3 are corrected and resolved before the next Test Move. The results from this move serve as the source for the Final Move to Production.

Final Move to Production

The final phase in the upgrade process is the Final Move to Production (FMTP). In this phase the upgrade team is upgrading the live production environment and performing the go-live cut-over to PeopleSoft 9.2 in the production environment. Once again the upgraded Copy of Production (from TM3) is the source and your production database is the Target. During this phase, all application users and developers are locked out of the PeopleSoft environments. The timeframe for this move is scheduled for a minimum of 2-3 days, starting typically with a Friday and working through the weekend. The final step of FMTP is to perform a review and assessment of the process and determine if the results meet the success criteria for a go-live during the weekend activities.

The upgraded database resulting from this move (FMTP) serves as the University's live production environment on Monday morning. The exact schedule of the FMTP process will be defined and scheduled according to the University's business and resource constraints.

Technical Summary of the steps involved:

1. **Prepare the Database:** We shall ensure the functional and Technical integrity of database, with the help of respective Audit Reports delivered in the certified path.
2. **Apply People Tools Changes:** This activity involves the execution of Rel (New Release) scripts so as to perform tools upgrade to 8.53.

3. **Apply Application Changes:** Copy the set of 9.0 Object definitions to Target i.e. Copy of production database. Apply the Upgrade Bundles for Data conversion and Perform Data Conversion for the certified path.
4. **Finalizing the Database Structure:** Execute the Scripts to Load Application Data, Run the Final Audit Reports to Ensure Integrity in the Upgraded instance.
5. **Complete Database Changes:** Configure the Application server and Web server for the Upgraded instance and setup the PIA. Setup and Synchronize the Security.
6. **Testing the Upgraded Instance:** Test the Upgraded Instance thoroughly.

HIGH LEVEL UPGRADE METHODOLOGY

Our Upgrade Methodology consists of following stages when we strategize and plan with the University on the complete end-to-end PeopleSoft 9.2 Upgrade project. Our detailed project plan will include coverage for these areas.

Stage One: Analysis and Planning

Stage Two: Upgrade and Integration

Stage Three: Testing and Training

Stage Four: Deployment and Post Production Support

Following are the key activities in each phase that need to take place in this project. Further below you will see the deliverables for each of these phases; and later in our proposal, we specify who is responsible for the various activities and deliverables.

1. Project Management Activities;
2. Application Upgrade Activities;
3. Functional Activities;
4. Development Activities;
5. System Administration Activities; and
6. Infrastructure Activities.

Our approach also breaks the upgrade into on-site and off-site components. The off-site components take place at our Pleasanton, California, work location. The on-site component comprises information gathering requirements, coordination with the University's business users, and going through all the test moves to production.

The Upgrade Process involves installing the PeopleSoft 9.2 Demo database, creating the upgrade environment and executing the upgrade passes. PeopleSoft provides an upgrade tool, Change Assistant, for executing the delivered upgrade scripts. Compare reports are produced during the initial upgrade pass and provide critical insight for the Fit-Gap analysis and determining the effort to re-apply/re-develop customizations. After the initial pass, multiple upgrade passes are executed to test, refine, and enhance the PeopleSoft delivered scripts. The execution of the Upgrade Process is the most critical phase and differentiates an upgrade from traditional implementations.

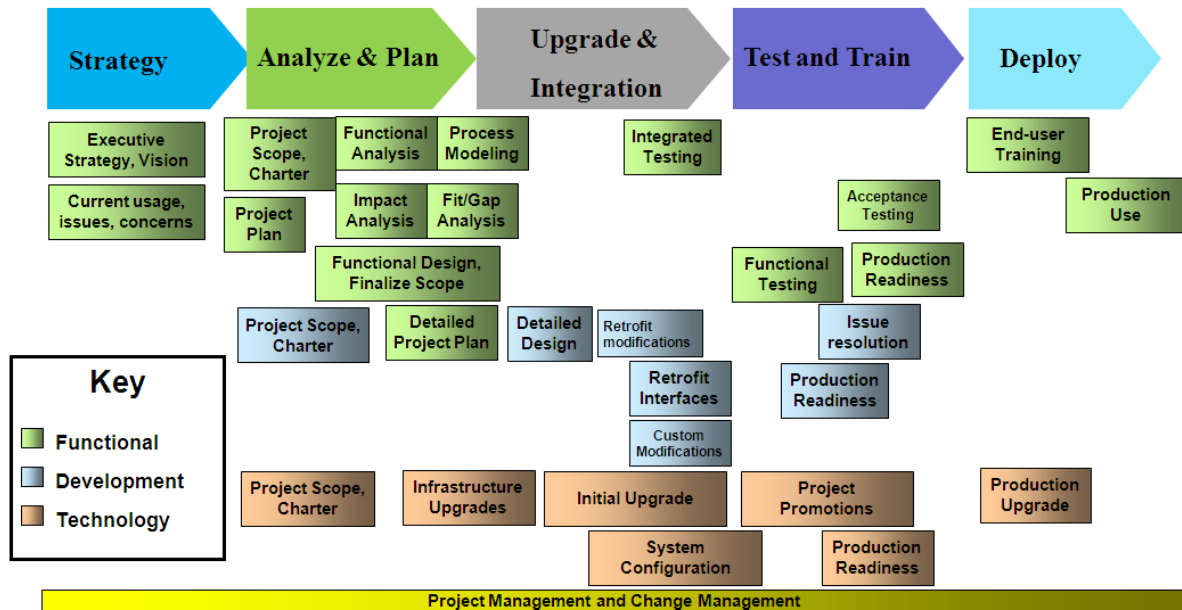
The SmartERP approach for this project consists of four phases discussed earlier. Our approach is flexible, and we expect the final approach to be tailored to the specific needs of the University once the planning effort is complete. The following steps are the components of our methodology:



#	Phase	Details
Stage-1	Analyze and Plan	This phase establishes the overall project environment. Establishing solid project governance is a key success factor to delivering the project on time. Appropriate Analysis and Planning at the beginning of the project sets proper expectations and identifies the process for actively managing the project. In this phase, all up front planning is completed, the team identified, timelines established, and supporting project processes documented. The effort is kicked off and the project “road map” is defined for completing the work.
Stage-2	Upgrade and Integration	In this phase, the initial pass to 9.2 will be done. This move typically contains more tasks than the regular test moves. This phase also involves development or retrofits of reports, interfaces, conversions, and any other customizations. Security, Workflow and Portal will be configured if required.
Stage-3	Testing and Training	Testing ensures that each function of the system works as expected. Multiple test moves are executed to insure completeness and accuracy. Data is loaded into the test instance, results are verified, and discrepancies are documented. Any errors or corrections to the system are documented and will be resolved before the next test move
Stage-4	Deployment and Post Production Support	During this phase the main deliverables are to properly plan the actual time of the upgrade and make sure that resources are properly prepared to execute the rollout plan. As part of the planning process, a detailed plan will be created and reviewed for this phase, as it impacts the production environment. The post implementation support plan is also established in this phase to ensure that the new production instance can be successfully supported during the critical first few weeks.

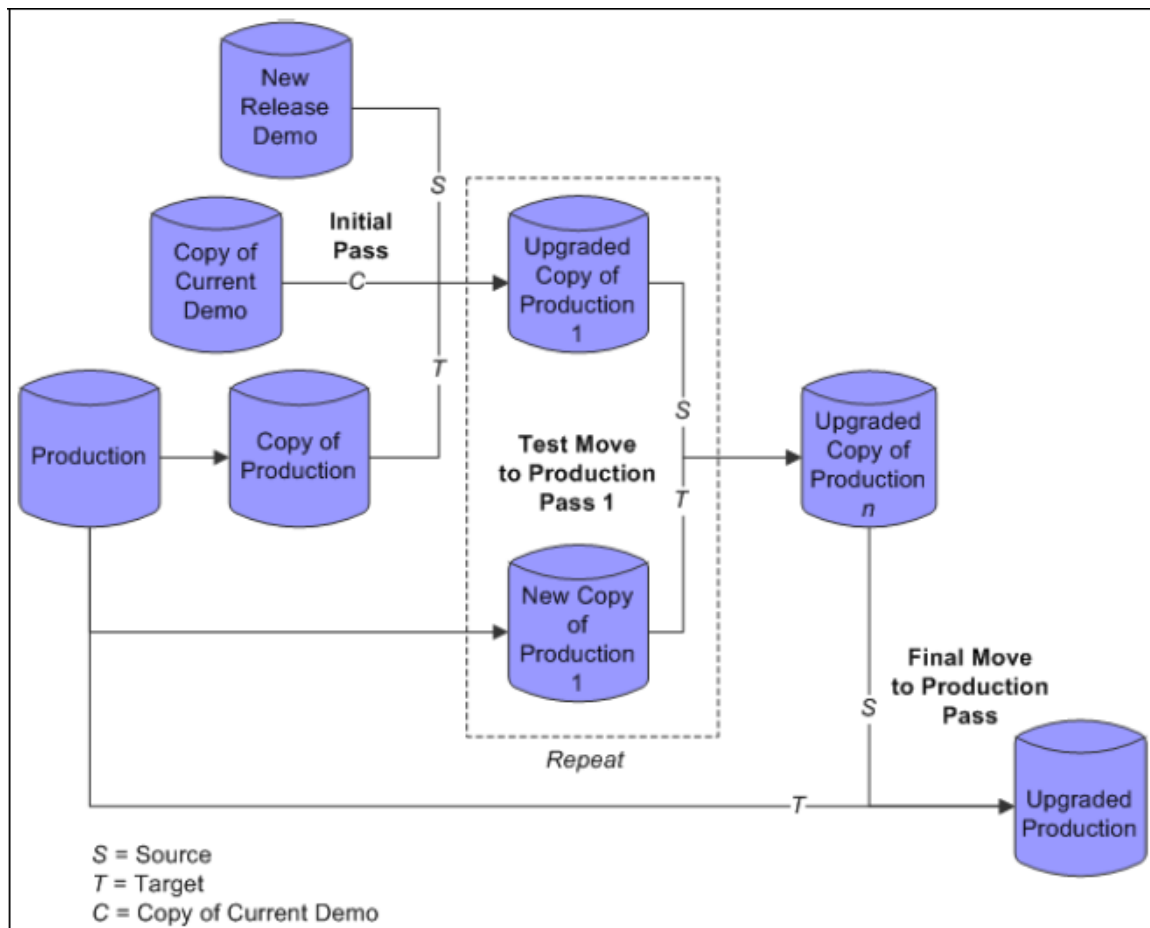
Upgrade Project Methodology

A high level view of activities in an upgrade project are given below.



TECHNICAL SUMMARY OF THE STEPS INVOLVED:

1. **Prepare the Database:** We shall ensure the functional and Technical integrity of database, with the help of respective Audit Reports delivered in the certified path.
2. **Apply People Tools Changes:** This activity involves the execution of Rel (New Release) scripts so as to perform tools upgrade to 8.53, Analyze the customizations if any in the People Tools objects.



3. **Run and Review Compare Reports:** Generate the Compare report to analyze the customizations in the retired object definitions or modified objects definitions and map the requirements feasibility to newly added objects, also Identify the bolt on Objects so as to retain them as is in New Release.
4. **Apply Application Changes:** Copy the set of 9.0 Object definitions to Target i.e. Copy of production database. Apply the Upgrade Bundles for Data conversion and Perform Data Conversion for the certified path.
5. **Finalizing the Database Structure:** Execute the Scripts to Load Application Data, Run the Final Audit Reports to Ensure Integrity in the Upgraded instance.
6. **Complete Database Changes:** Configure the Application server and Web server for the Upgraded instance and setup the PIA. Setup and Synchronize the Security.
7. **Testing the Upgraded Instance:** In order to ensure a quality implementation, testing needs to be performed to validate the new system. During this stage conversion, functional, integration, user acceptance, volume/performance and parallel testing will be performed. Parallel testing is optional and will be determined as part of the engagement.

Test Type	Description	Resources
Unit Testing	Unit Testing is the testing of a specific customization, interface, report or configuration within a specific module.	Typically conducted by developers and those who have configured specific functionality. Conducted by project team leads.
System Testing	System testing is end to end testing. It involves the entire process of a piece of functionality as it moves throughout a module. Also involves testing a specific business process end to end as designed including those outside of the software.	Typically conducted by project team leads.
Integration Testing	Integration testing is the testing of data and processes from end to end across all business areas. Integration testing ensures that the individual modules have been configured appropriately to work together and data flows and resources down the process flow understand how to execute.	Typically conducted by project team leads.
Performance Testing	Performance testing is technical infrastructure testing designed to ensure that positive response times will be achieved while simulating the anticipated stresses and strains on the production system.	Typically conducted by the technical project team.
User Testing	User testing is the end users testing the system which the project team has designed. It is a combination of unit testing, system testing and integration testing.	Typically conducted by the end users of the system.

All test failures will be logged, reviewed and corrected. In the final stages of testing, some failures may be deemed “not critical” to be resolved before moving to production. All other test failure resolutions will require approval to perform the move to production. After the completion of testing, the move to production (e.g. rollout) will begin.

SMARTERP LAB OPTION FOR 9.2 UPGRADE:



WHY SMARTERP?

FOR A BEST-IN-CLASS ENTERPRISE

- Enhance Productivity
- Paperless Processing
- Security & Compliance
- Automate & Streamline Business Processes
- Transactional Analytics & Business Intelligence
- Rich User Experience
- Enterprise Integration

COST-EFFECTIVE UPGRADES:

- Our upgrade service provides a rapid and cost-effective upgrade to PeopleSoft Enterprise 9.
- Smart Solutions to dramatically improve your business processes and avoid customizations are offered at No Cost
 - Employee Onboarding
 - Electronic Forms
 - Vendor Onboarding
 - Segregation of Duties
- Automated test scripts for standard PeopleSoft business processes are offered at No Cost
- Fixed price upgrades

SMARTERP LAB ACCELERATED PEOPLESOFT 9.2 UPGRADE

SMARTERP LAB COMPARATIVE OVERVIEW

For a low-risk accelerated upgrade, we assemble a DEMO database matching your current release including your licensed application modules. We will then compare your production system to this DEMO to identify all of your customizations. The major technical aspects of a PeopleSoft application upgrade include:

Upgrade Phases
Preparation
Evaluation
Upgrade Compare/Reports/Copy
Analysis of Reports
Alter Phase
Convert Data
Clean up and Testing
Test Move(s) to Production
Move to Production

By using our process, almost 90% of the technical upgrade is performed by the SmartERP Lab thus relieving your organization from these tasks. While the preparation phase needs to be performed by you, SmartERP can assist with this planning and preparation by making sure you understand everything that is involved in an upgrade.

SmartERP will perform the next phase of the process—evaluating the level of customizations in your database. Next, we will create the compare reports, analyze them and copy in the new objects. Although this represents only one phase, this is the most time consuming phase of the process. This is followed by performing the alter and data conversion phases and finalized with SmartERP completing the cleanup in the next phase. You finish the process by performing the integration testing and executing the Move to Production.

The following chart illustrates how much of the effort is performed by the SmartERP Lab:

Client	SmartERP Lab
Preparation	Preparation
Installation of New Release	Installation of New Release
Evaluation	Evaluation
Upgrade Compare/Reports/Copy	Upgrade Compare/Reports/Copy
Analysis of Reports	Analysis of Reports
Alter Phase	Alter Phase
Convert Data	Convert Data
Cleanup and	Cleanup
Test Move(s) To Production	Support Test Move(s) to Production
Final Move to Production	Support Final Move to Production

THE SMARTERP LAB UPGRADE PROCESS

PREPARATION

The first step is to arrange for your database to be packaged and delivered to us. The SmartERP Lab will provide the scripts necessary to accomplish this task. These scripts are designed to package the database with the objects needed to perform the upgrade but not compromise the confidentiality of your data. For this reason, tables containing your sensitive or confidential information are not brought into the SmartERP Lab. The conversion of this data will be handled later in the upgrade process.



SMARTERP LAB ACCELERATED PEOPLESFT 9.2 UPGRADE

WHY UPGRADE TO 9.2?

- Improve User Productivity using Work Centers
- Incorporates hundreds of new features
- More self-service capabilities
- Activity Guides to enhance business processes
- Improvements in security and controls
- Identify problems quickly and act to minimize the impact

SMARTERP LAB ADVANTAGES:

LESS WORKLOAD ON YOUR RESOURCES

By using the SmartERP lab for upgrade, your involvement in the application upgrade process is minimized.

FASTER UPGRADES

We perform a major portion your upgrade in our lab on our own dedicated systems.

QUALITY ASSURANCE REVIEW

SmartERP team lead performs seven quality control checkpoints throughout the upgrade.

EASIER FUTURE UPGRADES

With best practices followed, SmartERP will make upgrades easier in the future.

EVALUATION

Upon receiving the database, SmartERP recreates the database. Next, compare reports are created comparing your database with a "vanilla" (unmodified) database at the same release as your current production environment. These compare reports are then analyzed by the SmartERP Lab staff in order to precisely determine the level of customization.

This evaluation is used to validate the scope of the upgrade and the time required to complete the upgrade in the SmartERP Lab. The evaluation is typically completed within five days of the schedule upgrade project start date.

For customers needing to understand what customizations were made to their application, the deliverables from this evaluation can serve as that much needed documentation. As a stand-alone offering this evaluation is a service that the SmartERP Lab can provide as a separate service.

COMPARE AND COPY

The process continues with the creation of the Full Compare Reports. First, the PeopleTools tables are brought up to the current release (PeopleTools Upgrade) in order to compare your database against the new release. The compare reports are then run and analyzed to identify any customizations that may be in conflict with functionality in the new release.

The goal of the SmartERP Lab is to provide you with all the added functionality in the new release, as well as carry forward as many of your customizations as possible. Potentially, customizations will exist which cannot be reapplied. These cases will be clearly documented in the Upgrade Notes document.

UPGRADE AND BE UP-TO-DATE

With the new PeopleSoft Feature Pack model from Oracle, when you perform an upgrade the amount by which you could be out-of-date has been reduced with respect to Maintenance Packs/Bundles. But even with this model, depending on the time you decide to start the upgrade, you can get out-of-date by multiple Maintenance Packs. Once a new upgrade release is generally available from Oracle, when issues are encountered they will typically require that you be on the latest patch levels which can make upgrading even more challenging. SmartERP has been very successful in the process of including the latest Maintenance Packs as part of the upgrade process. Hence your upgrade will get you truly up-to-date, reducing the overall cost of maintenance while leveraging the very latest features available.

PACKAGING

The final process in the SmartERP Lab is to repackage the database in preparation for the onsite delivery. A PeopleTools export is created and packaged along with the logs, scripts, and other deliverables generated during the technical upgrade. We package this on a CD and deliver it to you so that you have a complete account of your upgrade.

DELIVERY

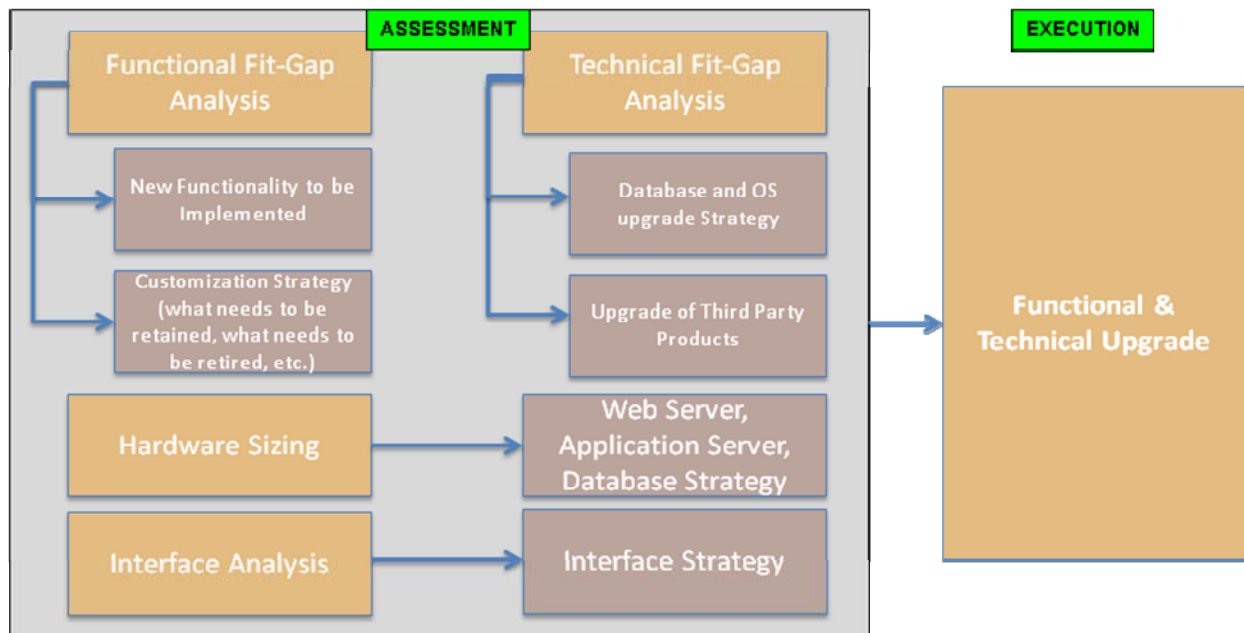
To complete the SmartERP Lab's involvement in the upgrade, a consultant travels to your site to support your Test Move to Production. This process involves importing the upgraded PeopleTools tables into a Copy of the Production database. This is followed by running table creation scripts, table alter scripts, and index recreation scripts. Once that is completed, the data conversion scripts can be then executed to convert the data from the old release table structures to the new release table structures. Throughout this process, we will work directly with your resources so they gain the hands-on experience necessary to conduct subsequent Test Moves to Production as well as your Final Move to Production after the full testing cycles are complete.

APPROACH TO UPGRADE

The Upgrade Roadmap comprises of the following:

UPGRADE ASSESSMENT : This part will prepare the platform of the PeopleSoft Upgrade

PEOPLESFT UPGRADE : Technical and functional upgrade of PeopleSoft 9.0 to 9.2 will be carried out.



PROJECT ACTIVITIES AND DELIVERABLES

Stage	Activities	Deliverables
Initiate	<ul style="list-style-type: none">Project KickoffProject Team FormationSetup InfrastructureHigh Level Project Plan	<ul style="list-style-type: none">Project CharterProject Management Plan
Evaluate	<ul style="list-style-type: none">Understand existing functionality and interfacesRun Checks and AuditsPerform Vanilla Compare and Full Compare at SmartERP LabPrepare inventory of customizationsEvaluate customizations and decide which ones to carry forward and which to	<ul style="list-style-type: none">Detailed Feasibility documentRoadmap for UpgradeInventory of customizationsDetailed Project Plan

Stage	Activities	Deliverables
	eliminate <ul style="list-style-type: none"> ▪ Prepare Detailed Project Plan and Roadmap for Upgrade 	
Upgrade, Retrofit and Integrate	<ul style="list-style-type: none"> ▪ Copy Upgrade Project ▪ Retrofit Customizations ▪ Run Upgrade Scripts ▪ Product Parameterization and setup (for upgraded version) ▪ Upgrade Batch Objects ▪ Run Checks and Audits ▪ Unit Testing (Test Plan and Test Results) ▪ Project Documentation 	<ul style="list-style-type: none"> ▪ Design Documents ▪ Upgrade Scripts / Source code / Executable code / Product Parameter Export
Test	<ul style="list-style-type: none"> ▪ Prepare Systems and Integration Test Plans ▪ Systems and Integration Testing ▪ User Acceptance Testing ▪ Project Documentation 	<ul style="list-style-type: none"> ▪ Systems and Integration Test Plan ▪ System Test Cases and Results
Train	<ul style="list-style-type: none"> ▪ Prepare Training Material ▪ Conduct Training 	<ul style="list-style-type: none"> ▪ Training Plan ▪ Training Material
Deploy	<ul style="list-style-type: none"> ▪ Prepare and check hardware readiness for upgrade ▪ Install and check required system software, and tools ▪ Prepare cut over plan ▪ Run Checks and Audits ▪ Move to production 	<ul style="list-style-type: none"> ▪ Release Documents ▪ Production Movement Log
Support	<ul style="list-style-type: none"> ▪ Post Production Support 	<ul style="list-style-type: none"> ▪ Issue and Resolution Log

A COLLABORATIVE TEAM

Our experience continues to confirm that the best results are achieved when our client is actively involved in the project. While SmartERP can provide product knowledge, business experience and best practices expertise, only client can provide the necessary understanding of the current applications system(s), the dynamics of the evolving enterprise and the business strategy that must be reflected in the enterprise

applications. Therefore, SmartERP's Approach and Methodology is specifically designed to support and encourage consistent client participation throughout the process.

We strongly suggest that client identify a team of Super Users who will be fully or partially dedicated to the project team for the entire project. Consistent participation provides the basis for the highest level of knowledge transfer.

2.4 PROJECT PLANNING AND EXECUTION METHODOLOGY

PLANNING, COMMUNICATION, RISK MANAGEMENT AND ESCALATION

SmartERP will provide project management for the execution of the projects. The purpose of this activity is to provide technical direction and control of SmartERP project personnel and to provide a framework for project planning, communications, reporting, procedural and contractual activity. This activity is composed of the following tasks:

Planning

- Review the proposal and the contractual responsibilities of both parties with the University Project Manager.
- Maintain project communications through the University Project Manager.
- Coordinate the establishment of the project environment.
- Establish documentation and procedural standards for Deliverable Materials.
- Prepare and maintain the project plan for performance of this proposal which lists the activities, tasks, assignments, milestones and estimates.

Project Tracking and Reporting

- Review project tasks, schedules, and resources and make changes or additions, as appropriate. Measure and evaluate progress against the project plan with the University Project Manager.
- Review the SmartERP standard invoice format and billing procedure to be used on the project, with the University Project Manager.
- Work with University Project Manager to address and resolve deviations from the project plan.
- Conduct regularly scheduled project status meetings.
- Prepare and submit periodic Status Reports to University Project Manager.
- Administer the Project Change Control Procedure with University Project Manager.
- Coordinate and manage the technical activities of SmartERP project personnel.

PROJECT PLANNING

Project Planning comprises of following activities:

- Identifying the process model
- Identifying major work products / milestones
- Identifying critical path, process deviations
- Selecting reusable components/artifacts tools for project execution
- Identifying assumptions / constraints / dependencies
- Planning for risk mitigation
- Identifying issue types and owners to resolve them
- Planning for resources
- Identifying configuration management activities
- Planning for metrics collection
- Planning for reviews/testing
- Planning for defect prevention activities
- Creating project plan

PROJECT SCHEDULING AND TRACKING

SmartERP Project Manager prepares and updates the project schedule using Microsoft Project. The Project Manager verifies tasks and effort at least once a week (typically once a week and if required, daily, at critical stages of the project) at an individual level through work plan. As part of tracking and monitoring the progress of the project, the following activities are performed.

- Monitoring technical activities of the project
- Ensuring the group's interpretation and translation of the technical requirements conform to the system requirements
- Checking adherence to schedule by verifying week's planned tasks against the accomplished ones
- Reviewing if client commitments are being met
- Identifying the reasons for any delays and take corrective actions, if necessary, to get the project progress back on track
- Reviewing risks and issues for an escalation

REPORTING

SmartERP Project Manager consolidates data from the work plan periodically. Information is analyzed to prepare a status report.

SmartERP weekly progress report contains the following:

- Tasks planned for the coming week

- Tasks completed in the previous week
- Tasks not completed as planned in the previous week
- Tasks delayed by a period of more than 1 week
- Any issues and concerns (awaiting action and by whom: SmartERP, University)
- Requirement Changes for approval (with impact on cost and schedule)
- Upcoming review milestones

ESCALATION AND ISSUE RESOLUTION PROCESS

Issue escalation procedure with regard to the type of issues and responsibilities for resolving each type of issue will be defined in the Project Plan. Any issues that are not resolved within the specified time duration will be escalated to the next higher authority.

A typical escalation path and threshold period beyond which the matter is escalated to the next level is mentioned below. These details will be modified to reflect University organization structure. Threshold period' indicates the time that has elapsed since an issue was first raised.

Escalation from University to SmartERP

Threshold Period	Escalation Level
2 days	SmartERP Project Manager
3 Days	SmartERP Delivery Manager
5 Days	SmartERP Practice Head

Escalation from SmartERP to University

Threshold Period	Escalation Level
3 days	University Project Manager
5 Days	University Senior Manager (PMO Member)
7 Days	University Project Sponsor

ACCEPTANCE PROCEDURE

Except for status reports, project plan, and code/executables, each Deliverable Material will be reviewed and accepted in accordance with the following procedure:

- One (1) printed/email draft of the Deliverable Material will be submitted to the University Project Manager. It is the University Project Manager's responsibility to make and distribute additional copies to any other reviewers.
- Within three (3) business days, the University Project Manager will either accept the Deliverable Material or provide the SmartERP Project Manager a written list of requested changes. If no response from the University Project Manager is received within three (3) business days, then the Deliverable Material will be deemed accepted.
- If a written list of requested changes is received within three (3) business days, the SmartERP Project Manager will make the appropriate revisions and will, within two (2) business days, resubmit the updated final version to the University Project Manager, at which time the document will be deemed accepted.

CHANGE CONTROL

Mechanism of Change Control

Important checkpoints for controlling changes in scope are as follows:

Requirement sign-off

- Requirements freeze - Business and project teams agree upon the scope of the release and all the requirements within the scope are signed off.
- In order to control the flow of changes after requirements freeze, SmartERP proposes to set up a Change Control Board (CCB).
- The CCB would constitute of members from both Client and SmartERP.

The members of a CCB typically are:

- Client Project sponsor
- Program Manager of SmartERP
- Client User Group Lead

The objective of CCB is to monitor and control changes in requirements, so as to minimize the impact of changes on timelines, cost and quality.

The CCB evaluates every change request that comes to CCB, to determine the criticality of the change to the project, to assess the impact and make a decision on approving the change or rejecting the same.

Rejected request may be taken up in a future release.

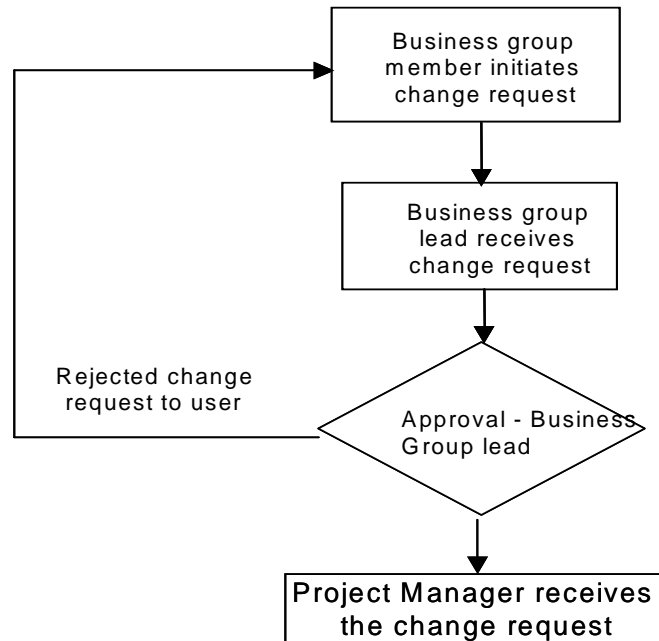
Change Control Process

A change request begins with a 'Business User' initiating the same by filling out a change request form.

This request is forwarded to the Business Group Lead, who decides whether the change is critical.

An approved change request is sent from the Business Group Lead to the Project Manager of SmartERP

This process is depicted in the flowchart below.



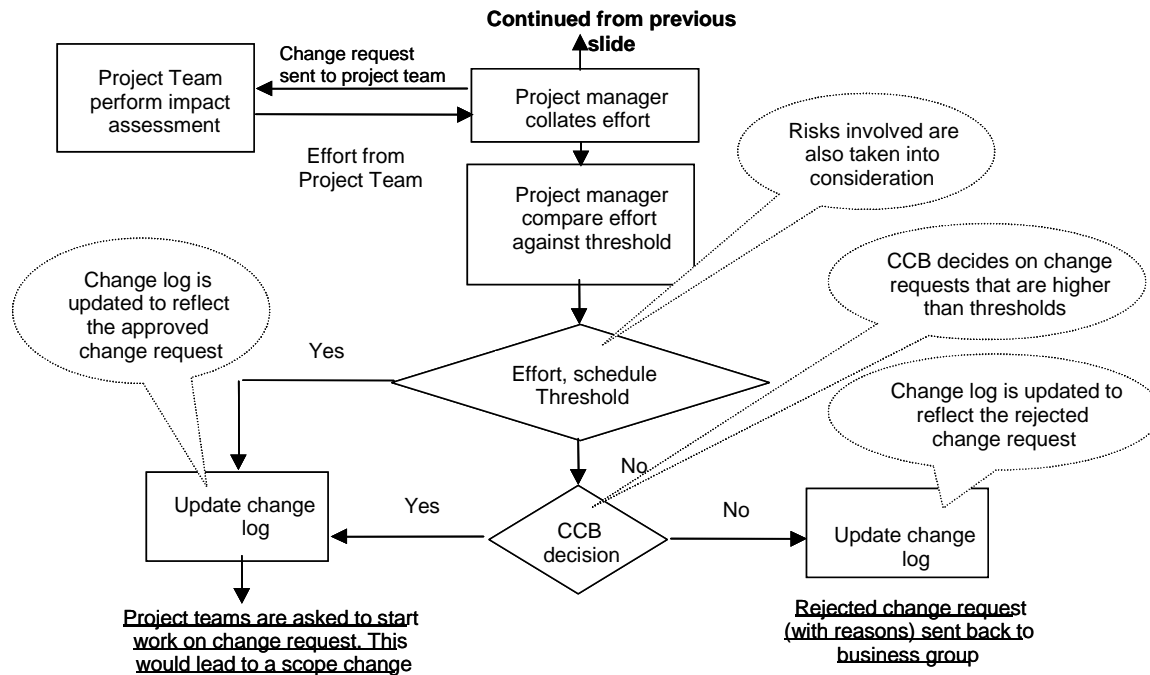
SmartERP Project Manager sends the change request to his team for Impact assessment.

Effort is collated and then compared against threshold.

If effort is greater than threshold or threshold has been exceeded the request is forwarded to Change Control Board with details of Impact assessment.

If CCB approves the change request, change logs are updated and the project team begins work on the change.

This part of the process is presented in the flowchart below.



CONFIGURATION MANAGEMENT

In a distributed team environment (client team and SmartERP team), there are often occasions when many people (technical staff) work on the same code / program in multiple versions of code. Use of incorrect version may result in additional programming effort, deliverables inconsistent with requirements, schedule slippage or poor performance of the software delivered.

To prevent occurrence of such errors, SmartERP follows a well-defined Configuration Management (CM) Process. Configuration Management is the process of identifying, organizing and controlling modifications to the software being developed. Software work products are identified as configuration items and CM Plan is defined to manage these configuration items. Every project executed at SmartERP will have a CM Plan. This plan lists the configuration items identified for the project and sets naming standards for each type of configuration item. It also defines the directory structure and specifies folder locations where configuration items in different life cycle stages should be located. Version control of artifacts, procedures for release, reconciliation and archive, access control by roles, audit procedure to ensure configuration process compliance and frequency of audits are some of the other important details provided in the CM plan.

Typical configuration items are mentioned below:

Product related items – Requirement specifications, test plans, high level and detailed design documents, prototypes and source code

Project management items – Statement of work, software project plan, project schedule, configuration management plan, project change requests

Process related items – Guidelines, standards, templates, checklists and forms

Knowledge Management related items – Knowledge acquisition plan, transition plan, induction plan, resource rotation plan

Changes in requirements or problems detected in later in the life cycle, necessitate changes to configuration items. A configuration item that has been formally reviewed and agreed upon, which thereafter serves as the basis for further development, needs to be frozen in the form of a baseline. Baselines need to be established at the end of every milestone during the project life cycle.

In brief, the configuration management at SmartERP enforces version control ensuring the following:

Delivery of software conforming to requirements

Minimum rework due to use of incorrect version of work product

RISK MANAGEMENT

Risk management plan is an integral part of SmartERP' software project plan defined for every project.

Risk Management is a proactive assessment and planning methodology that encompasses:

The identification of situations (risks) that may negatively impact the project

Evaluating the impact and probability of the management of those risks

Managing identified risk through focused activities and tools

Risk Management Plan will identify risks by Likelihood (of risk occurrence), Impact and Priority for Action (on occurrence of the risk) and define mitigation procedure for risk containment.

A sample risk mitigation template is outlined below.

Risk Description	Likelihood H/M/L	Impact H/M/L	Risk Mitigation Plan
Scope Creep	M	H	<ul style="list-style-type: none">▪ Identify the project scope in the beginning and try adhering to it.▪ Design and execute to a strong scope change procedure.▪ All scope change requests, regardless of size are documented, approved or denied by project management.

Risk Description	Likelihood H/M/L	Impact H/M/L	Risk Mitigation Plan
Insufficient Testing	M	H	<ul style="list-style-type: none"> Design an effective testing strategy. Allow for sufficient time for unit testing, system testing, performance testing, integration testing and user testing.
Insufficient Resources	M	H	<ul style="list-style-type: none"> Identify in the project charter the project resources required for success. Secure executive management sign off for the commitment of the resources for the duration of the project. Identify a backup plan for each resource.
Delays in resolution from client team	M	H	<ul style="list-style-type: none"> To raise the issue to Project Management Office with logs and inform in addition the possible impact on the schedule

Key activities in risk management include:

Risk Assessment

- Risk identification
- Risk analysis
- Risk prioritization

Risk Control

- Risk mitigation
- Risk monitoring

SmartERP' Risk Management Plan identifies risks from the perspective of:

- Engagement Risks
- Technology related risks
- People related risks
- Process related risks
- Infrastructure and Communication related risks
- Application specific risks

The Risk Management Plan will be continuously modified as the risks encountered by the project/program keeps changing with time; new risks emerge, the severity of identified risks may increase or decrease. Risks are regularly tracked, assessed and compared and the Risk Management Plan is modified so that at any given point of time, mitigation steps for prevention of future risks are in place for the program.

Risk Mitigation Plan is implemented during the project execution. Risks are re-assessed at project milestones and frequency of re-assessment changes by the life cycle stage. Risks are continuously tracked and communicated by regular status reporting.

3. BILLING RATES

Roles	Onsite Hourly Rate	Level of Expertise
PeopleSoft Functional Lead / Project Manager	\$140	10+ years of relevant Project Management / PS module specific experience
PeopleSoft Functional Consultant	\$120	8+ Years of PS module specific experience
PeopleSoft Upgrade Specialist	\$110	10+ Years of experience majorly in upgrades
DBA/PS Administrator	\$100	5+ Years of experience in DBA/PS Administration and Upgrade
PeopleSoft Technical Developers	\$90	5+ Years of experience in PeopleSoft Development

4. OTHER COSTS

The billing rates mentioned above are “All Inclusive” for the base location where any the consultant is deputed for work. Any travel required as part of work will be charged back to the University at actual or as per University’s expense policy after getting prior approvals.

D. PRIOR EXPERIENCE WITH A LARGE, COMPLEX, MULTI-CAMPUS HIGHER EDUCATION INSTITUTION

Throughout our existence, SmartERP has focused on creating repeatable successes for higher education and public sector clients by efficiently and effectively leveraging the power of integrated Enterprise Resource Planning (ERP) solutions. We have assisted our clients realize significant returns on investment by focusing on best practice use of the software, business process improvement, data accuracy, enhanced reporting capabilities, elimination of waste and excellent service. For several years, SmartERP has been focused on resolving mission-critical failures with enterprise solutions and upgrading, implementing, re-architecting PeopleSoft with a focus on long-term Return on Investment (ROI).

This is a unique differentiator within the Oracle Partner world. While we fully leverage our solution architects and live up to the reputation we have with best practice use of the PeopleSoft solution, we believe our capability to work with our client's governance team to strategically align the fundamentals of their own organization to take advantage of those best practices sets us apart and has enabled us to achieve our 100% project success record. Having had the opportunity to work side-by-side with the higher education CIO/CTO and the Controllers, GMs, and Managers of Finance and Human Resources have given SmartERP a unique understanding of the trends in higher education.

EXPERIENCE WITH SYSTEMS/DATABASE ADMINISTRATION FUNCTIONS

Client	Date	Description
Howard University	2012-Current	PeopleSoft 9.1 HCM upgrade, PeopleSoft 9.1 HCM and Finance Customization and Implementations, PeopleSoft Administration & Smart ePAR implementation.
Time Warner Cable	2006-Current	PeopleSoft Customization, Upgrade, PeopleSoft Administration, Oracle and SQL Server Database Administration. The administration functions involve 24*7 maintenance of PeopleSoft and other critical systems along with Oracle and SQL Server Databases.
SkillSoft	2007-Current	PeopleSoft Financials Support and Upgrade, PeopleSoft Administration
Merial Inc.	2008-Current	Oracle and SQL Server Database Administration, CRM and Oracle BI
University of California Berkeley	2013-Current	PeopleTools 8.53 upgrade; PeopleSoft Financials 9.2 Upgrade Grants/Contracts; PeopleSoft Administration services

E. DEMONSTRATED ABILITY TO MEET REQUESTED PROJECT TIME LINES

SmartERP has executed several similar contracts for Higher Education and Government organizations over the last few years. SmartERP has the track to deliver these project on time and within budget. To demonstrate this experience, the following table provides a high level overview of each of these contracts as well as the SmartERP team members involved.

Client	Date	Description
University of California at Berkeley	2013-Current	PeopleSoft Financials 9.2 Upgrade from 9.0.
Howard University	2012-Current	PeopleSoft 9.1 HCM upgrade, PeopleSoft 9.1 HCM and Finance Customization and Implementations, PeopleSoft Administration & Smart ePAR implementation.
University of North Carolina	2013- Current	PeopleSoft 9.1 HCM and Financials Implementation
State of Delaware	2012	PeopleSoft Financials enhancements security, automation/streamlining, including to present Financials 9.1 Upgrade project. Security and Workflow implementation during Financials 8.9 implementations in 2008.
Berlin Packaging	2012	PeopleSoft Financials 9.1 upgrade Initial Pass and TM1 performed in SmartERP lab.
Cincinnati Children's Hospital	2013	Smart solutions upgrade to 9.1
Solano County	2011	PeopleSoft HCM enhancements automation/streamlining (electronic personnel action forms)
Napa County	2011 – Current	PeopleSoft Upgrade to Financials 9.1 services, since 2010; streamlining AR in Financials 2012
US National Lab	2009	PeopleSoft Financial Gateway implementation
US National Lab	2009	PeopleSoft HR, integration services
US Federal Dept. with global presence	2012	PeopleSoft HCM, automating employee onboarding
City of Sacramento	2007	PeopleSoft Financials consulting services

APPENDIX A- VALUE ADD SOLUTIONS

As part of this proposal SmartERP is offering the University NO COST software licenses for one of SmartERP's most popular HR automation solutions, **Smart ePAR™** for paperless personnel actions.

OPERATIONAL EFFICIENCIES FOR HCM USING SMART EPAR

Typically the processes for using manual personnel action forms has numerous steps, can range from simple to complex processing, requires considerable streamlining and business rules, and are often very specific to each organization. The activities typically require formal approval. With so many tasks and steps in the process, often independent and manual possibilities for delays and deviations from the prescribed process are plentiful.



Too Much Paper Work
/ Duplicate Efforts



Time Consuming



Manual Processes



Poor User Experience

Typical challenges in this manual process include:

- Inconsistent or Unenforced Policies and Procedures.
- Accountability, Control and Compliance.
- Achieving appropriate levels of visibility and status.
- Risk of fraud and error.
- Best practices in the process not known or implemented.
- Time drain on personnel due to issues.
- Opportunity for unintentional errors

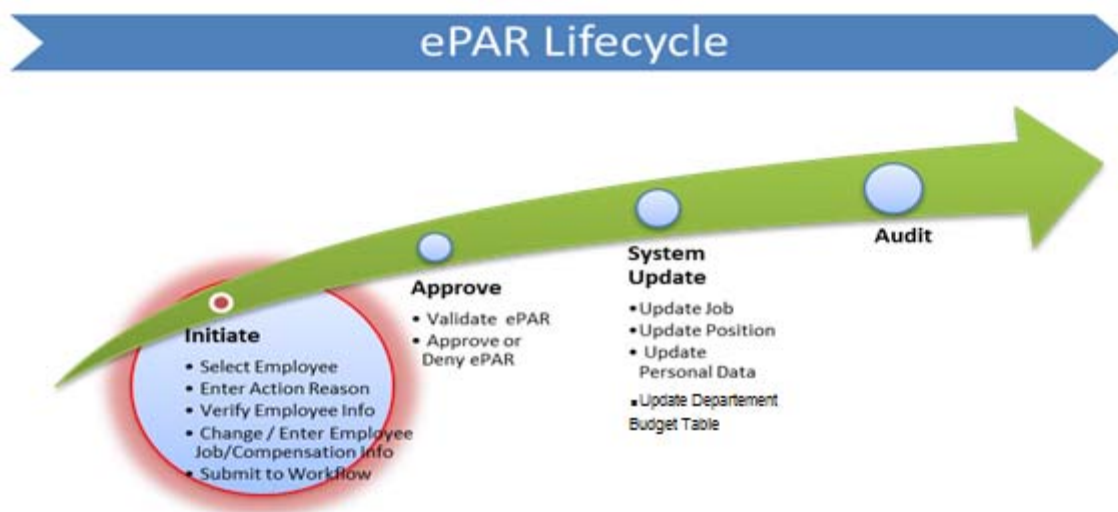
"Countywide, departments and HR process approximately 5,400 PAF per year . . . staff estimates a 300% ROI for this project in its first full year"

Solano County Department of HR,

SmartERP helps organizations utilize best practices and solutions to eliminate manual paper processes and roll out enterprise-wide process automation. In regard to HR personnel action forms/requests, the Smart ePAR solution moves processing of HR transactions from paper forms and manual approval processing to an on-line process from initiation to completion in the PeopleSoft HCM database. Each stage of the ePAR transaction can be tracked on-line and the approval routing is automated through the ePAR Workflow, a configurable feature for capturing specific approval routing requirements based on a Client's business processes.

LIFECYCLE

The Lifecycle of an ePAR begins with the initiation process and completes with the Audit process, if applicable. This ePAR Lifecycle applies to all ePAR categories, such as Hires, Terminations, Leaves, Data Changes, Transfers, etc. The Lifecycle of an ePAR transaction, from initiation to completion, including audit, are shown in the following diagram:



Initiate:

The ePAR is created and all the required information is associated with the ePAR prior to being submitted for workflow approval. The User Role typically assigned to ePAR users performing this activity is “Initiator”.

Approve:

Multiple workflow Approvers can electronically review the ePAR and approve accordingly. The User Role assigned to ePAR users performing this activity is “Approver”. The approval path for routing an ePAR is defined to follow Customer’s current business practices and approval requirements.

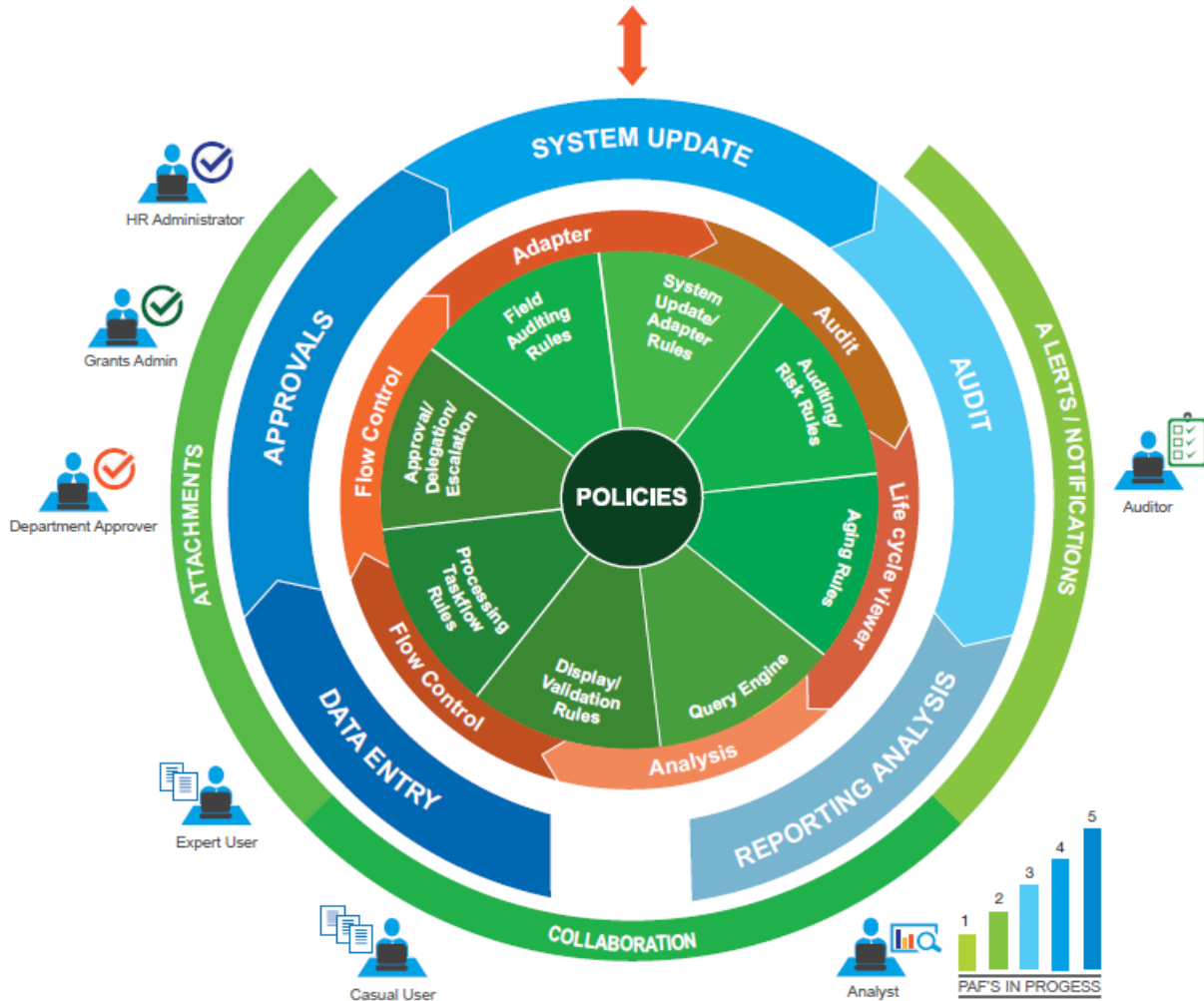
System Update:

Upon final approval by the last Approver, the system automatically updates the PeopleSoft HCM system tables with the ePAR transaction details. No manual data entry is required of the HR specialists.

Audit:

The ePAR information serves as an electronic audit trail and remains on-line for easy access and audit reviews. Any auditing requirements are performed by the Auditor. The User Role assigned to ePAR users performing this activity is “Auditor”. The current stage of the ePAR Lifecycle can be viewed on-line for each ePAR transaction. This graphic shows an example of the Lifecycle Viewer for a transaction that has completed the System Update, which is seen by the green bars that indicate progress:

PEOPLESOFT



SMART EPAR ROLES

During the lifecycle of an ePAR, different user roles are required for initiating, reviewing, monitoring, approving and auditing an ePAR. ePAR security roles that are assigned to the Users define the actions that are available in ePAR. More than one role may be assigned to a User, in which case the actions are cumulative and task-specific, based on what role tasks are being performed. For example, a User with both the Initiator and Approver roles could either create a new ePAR transaction or merely approve a different transaction that is routed through automated workflow.

The following User roles exist for ePAR:

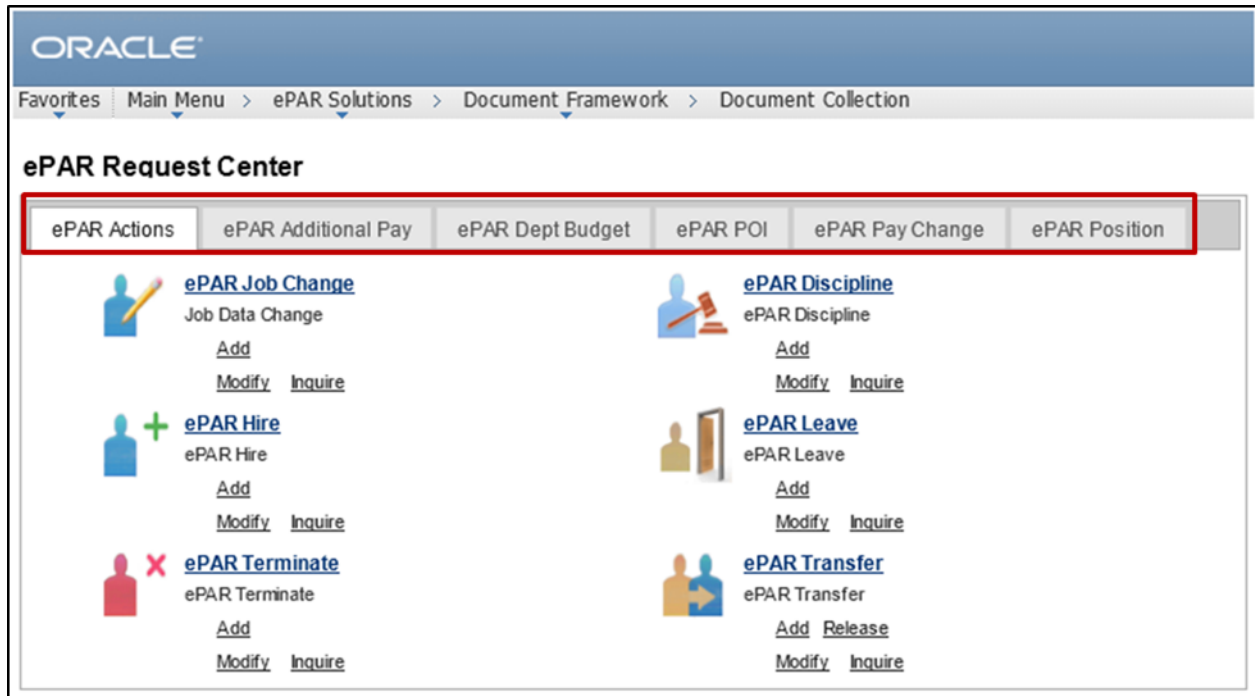
<i>User Role</i>	<i>Description</i>	<i>ePAR Stages</i>
Initiator	Initiate an ePAR transaction	Initial
Requester	Initiate and submit an ePAR transaction	Initial
Approver	Approval for an ePAR. Process actions available: Approve, Deny, Pushback, Hold, Transfer Release	Workflow
Ad-hoc Approver	Approver who is inserted when needed	Workflow
Reviewer	View/review existing ePARs	Workflow
Ad-hoc Reviewer	Reviewer who is inserted when needed	Workflow
Auditor	Audit completed ePARs after System Update	Audit
Administrator	Performs administrative tasks for ePAR use, including modifying approval paths and maintaining ePAR users	All

Each role is associated with the actions that are required for ePAR tasks to be completed. All ePAR Users are able to view transactions in their various stages of the Lifecycle. However, specific actions are allowed for each of the following roles:

<i>User Role</i>	<i>Actions</i>
Initiator	Add, Modify
Requester	Add, Modify, Submit
Approver	Approve, Deny, Pushback, Hold
Reviewer	Read-only
Auditor	Audit

SMART ePAR REQUEST CENTER

Smart ePAR components are centralized in the ePAR Request Center, which is organized into work areas that separate ePAR transactions by task type. The ePAR Request Center is accessed by navigation from the PeopleSoft HCM Home Page, as an example:



SMART ePAR CATEGORIES

Within each ePAR Category are predefined Action/Reason combinations, when applicable. Actions within an ePAR Category are associated with a list of predefined reasons appropriate for use with each action. These predefined Action/Reason combinations are available for selection when creating or maintaining an ePAR. Data entry and workflow approval requirements may be different for each ePAR category, as defined by your business practices. The following ePAR Categories are available, as an example


ePAR Category	Description of Actions	Examples of Transactions
Change	Job data changes	Job Information Change
Discipline	Discipline-related personnel actions for an Employee	Suspension, Reinstatement, Data Changes (working suspension, penalty, etc.)
Hire	Hire a new Employee, rehire a former Employee, or add job for existing Employee	Hire, Rehire, Additional Job
Leave	Leave-related personnel actions for an Employee	Leave of Absence, Seasonal Leaves, Return from Leave
Terminate	Termination-related actions for an existing	Retirement, Resignation, Termination


	Employee	
Transfer	Transfer of an Employee between Departments	Transfer between Departments
Additional Pay	Pay actions outside of regular compensation	Bonus, commission, moving expenses, etc.
Department Budget	Funding changes only	Change or end grant funding
Pay Change	Pay-related changes	Merit increase, cost-of-living adjustment, promotions
POI	Add a new Person of Interest or update existing Person of Interest	Person of Interest ID does not exist in PeopleSoft HCM
Position	Changes to existing Position	Reports-To change, Position Title change


SMART EPAR STANDARD FEATURES

<i>Features</i>		<i>Details</i>
User Interface	a) Ability to create dynamic, intelligent, interactive eForms.	<p>Smart Docs, the framework that's required to provide the Smart ePAR solution, allows business users to define the form data elements and basic form layout aspects without having to create PeopleSoft records or pages manually. These electronic forms leverage effective-dated logic to control various behavioral aspects when rendered online.</p> <p>An electronic form can be configured to have guided instructions to achieve a casual interface or an expert interface. An electronic form is rendered like any other PeopleSoft page as the underlying Smart Docs framework is built as an add-on solution within your PeopleSoft instance</p> <p>Within electronic forms, activities can be chained to have appropriate data collected for each activity. It is not necessary to have one person complete the transaction. Form chaining can be established so that data can be collected in a more collaborative manner. This way of collaborated data entry is offered in the Transfer ePARs where requesting department obtains permission from the releasing department before proceeding with a transfer action.</p>

Features	Details
	<p>b) Flexible, dynamic form design capabilities for process re-engineering improvements and streamlining.</p> <p>All electronic forms that are configured through Smart Docs end up being accessed through a standard PeopleSoft Portal Content Reference (CREF). Though the Smart Docs framework allows you to have any standard PeopleSoft page be part of the task chaining, all electronic forms that are built using Smart Docs are auto generated and dynamically rendered. So, no new components or pages are necessary to start a Smart Form. The system auto creates the necessary content reference links in the portal structure and passes appropriate parameters in the query string to render the form electronically. The advantage of an electronic form built using this architecture is the elimination of the PeopleSoft Application Designer when rendering forms for data capture.</p> <p>Smart Docs is a Toolkit that allows organizations to create electronic forms that support Data Capture, Approval Orchestration, Data Update, Auditing and Reporting. The data captured through Smart Docs can be subjected through various validations to ensure that each organization's unique business policies are enforced. Every transaction created using the Smart Docs Toolkit goes through a life cycle, which starts with Form Initiation. Electronic Forms have five unique states that are automatically defined for any electronic form:</p> <ol style="list-style-type: none"> 1. Initiation State 2. Approval State 3. Data Update/System Update State 4. Auditing State 5. Completed State <p>Throughout the lifecycle, different business users can collaboratively work on the ePAR to bring the electronic form or request to its completed state. The ePAR can have different layouts for representing the form data at any given time.</p>
	<p>c) User friendly tool for prototyping and modifying eForms; customizable.</p> <p>Smart Docs provides you the ability to easily configure electronic forms and PeopleSoft pages so that only the appropriate data is collected or displayed at each processing step. It allows for tailoring the forms and pages to efficiently and productively meet the specific business requirements and processing for the organization.</p> <p>Any electronic form built using Smart Docs can have data captured in simple-to-use guided steps. Within Forms, we call them tasks. These tasks can be chained to have appropriate data collected during data entry. It is not necessary to have one person complete the transaction. Task chaining can be established so that data can be collected in a more collaborative manner. The Initiator enters some information and the supervisor collects some additional information to complete the transaction. Visible aspects of the form can also</p>

Features	Details
	<p>be controlled based on the user that is viewing the form. Configurable display templates help the administrator to control the form display behavior based on a business role assigned to a user</p> <p>d) Process maps for managing and staging sequential processes; 'branching' sequential entry screens.</p> <p>The Smart ePAR solution can group separate transactions into a single transaction (e.g., some changes require multiple transactions such as promoting an employee might involve changing compensation as well as a position change). Virtually any transactions can be "chained" together or "branched" to employ unique business processes. Moreover, a unique feature of our solutions is that approval criteria are not limited to only that information associated with the current transaction providing for very flexible mechanisms.</p> <p>e) Integration; field lookups and defaults.</p> <p>Architected as an add-on solution for PeopleSoft applications, the Smart ePAR solution utilizes all of the native integration methods available for PeopleSoft applications including but not limited to web services for two-way integration with 3rd party systems. Web services are used for built-in integrations to third party systems such as the Department for Homeland Security for E-Verify integration.</p> <p>f) Ability to add comments and comment threads.</p> <p>The Collaborate function is a standard built-in feature available throughout the Smart ePAR transaction and includes a comments box that can track a threaded conversation between multiple participants within the context of a specific ePAR. The comments can be expanded by different users to provide a history of comments and replies related to the ePAR. This function is available for all user roles.</p> <p>An example of the threaded view of comments is shown below:</p>  <p>g) Ability to manage attachments.</p> <p>The Attach capability is a standard built-in feature available throughout the Smart ePAR transaction. Attachments can be made by the Initiator at any time during the lifecycle of an ePAR, even during the approval process.</p> <p>Features of the Attach functionality include:</p> <ul style="list-style-type: none"> Ability to add multiple/unlimited attachments. Attachments can be of various file types. Attachments can be uploaded or deleted anytime during the ePAR lifecycle as defined by users' business rules.

Features		Details
	h) Expandability for Mobile solutions.	<p>Mobile device interface for Smart phones or iPads that give ePAR users the full use of the system.</p> <p>Standard features include approvals via email and mobile devices such as iPhone, iPad, BlackBerry, etc.</p> 
Business Processing and Rules	a) Transaction driven processes; ability to manage multiple transaction types.	<p>Smart Docs offers a complete business process execution framework that allows transactional lifecycle to be defined as an end-to-end business process. Within the Smart Docs Business Process Configuration page, users can define various steps and activities and assign different participants to each of the activity.</p>
	b) Ability to track form status throughout lifecycle.	<p>The Lifecycle Viewer action is a standard features in the Smart ePAR toolbar presents the current status information and the details of the transaction stages that have been completed for a particular ePAR transaction, from initiation to completion. This graphically rich viewer provides complete insight including date/timestamps on when a particular activity is worked on and by whom.</p> <p>The Lifecycle of an ePAR begins with the initiation process and completes with the Audit process, if applicable.</p> <p>Initiate</p> <p>The ePAR is created and all the required information is associated with the ePAR prior to being submitted for workflow approval. The User Role assigned to ePAR users performing this activity is “Initiator”.</p> <p>Approve</p> <p>Multiple workflow Approvers can electronically review the ePAR and approve accordingly. The User Role assigned to ePAR users performing this activity is</p>

Features	Details
	<p>“Approver”. The approval path for routing is defined to follow Customer’s current business practices.</p> <p>System Update</p> <p>Upon final approval by the last Approver, the system automatically updates the PeopleSoft HCM system tables with the ePAR transaction details. No manual data entry is required.</p> <p>Audit</p> <p>The ePAR information serves as an electronic audit trail and remains on-line for easy access and audit reviews. Any auditing requirements are performed by the Auditor. The User Role assigned to ePAR users performing this activity is “Auditor”.</p>
c) User configurable business rules; online edits and filtering.	By design, Smart Docs provides easy mechanisms for business rules to be configured (not programmed from scratch) and includes features for online edits and filtering.
d) Apply security for tight controls over sensitive HR data.	The solution allows the transaction approval process to be configured by roles and various business policies and can support multiple parallel paths as well as easily accommodate multiple levels of approval. Workflow rules and policies are easy to configure allowing for alternative routing if the primary approvers are not available (Proxy functionality) and for routing within HR for special approvals (rules driven approvals or ad hoc features).
Workflow & Approvals	<p>a) Ability to share forms with other users; support for notifications.</p> <p>During the lifecycle of an ePAR, different user roles are required for initiating, reviewing, monitoring, approving and auditing an ePAR. ePAR security roles that are assigned to the Users define the actions that are available in ePAR. More than one role may be assigned to a User, in which case the actions are cumulative and task-specific, based on what role tasks are being performed. For example, a User with both the Initiator and Approver roles could either create a new ePAR transaction or merely approve a different transaction that is routed through automated workflow.</p>  <pre> graph LR subgraph Roles direction LR I[Initiator] R[Requester] A[Approver] subgraph Automated direction LR AU[Automated] end D[Auditor] end Start(()) --> CM[Create/Modify ePAR] CM --> S[Submit] S --> AP{Approve?} AP -- Yes --> SU[System Update] AP -- No --> CM SU --> AU[Audit] </pre> <p>Notifications can be configured so that emails are sent to the next approver(s) automatically and include a link which brings the approver directly to the approval page. Smart ePAR sends emails to approvers that include a link to the approval page or the approval inbox based on the client’s requirement. Being able to review the details of a transaction prior to approval is a configurable option.</p>

Features	Details
	<p data-bbox="496 310 691 405">b) Electronic approvals and workflow routing.</p> <p data-bbox="735 310 1576 436">The solution provides electronic workflow routing and approval rather than circulate paper to various departments for approvals and signature. Electronic date and time, along with approvers comments are captured online and retained for audit trail purposes.</p> <p data-bbox="735 495 1572 684">Smart ePAR provides complex automated workflow with enhanced features such as a common in-box, attachments and ad-hoc approvers while avoiding costly, difficult-to-maintain customizations. Multiple workflow Approvers can electronically review the ePAR and approve accordingly. The User Role assigned to ePAR users performing this activity is “Approver”. The approval path for routing is defined to follow Customer’s current business practices.</p> <p data-bbox="735 730 997 758">Key workflow Features :</p> <ul data-bbox="735 768 1568 1875" style="list-style-type: none"> • Common approval framework. • Configurable common approval inbox • Approval rules and approver setup is both wizard-based and designed to be used by the business user rather than IT personnel • Supports parallel and sequential approval paths, and workflow attachments • Allows adhoc approvers and reviewers to be easily inserted into the approval cycle • Graphical display showing the status of the ePAR at all approval stages • Electronic/digitized signatures for approvals • User Defined Routing Rules and policies <ul style="list-style-type: none"> ○ Route by any Field Value ○ Route by Tree Nodes • Common Approver/Reviewer Setup <ul style="list-style-type: none"> ○ Approvers and Reviewers Setup in Same Fashion ○ Assign by Any Field Value ○ Assign by Tree Nodes • Configurable Searches – NO Worklist • Mass Approval Capability • Ability to Enter Ad hoc even Prior to First Step • Rerouting Template • Choose Data Elements that Require Rerouting for Workflow • Email and Mobile Device Approvals <ul style="list-style-type: none"> ○ Standard features include approvals via email and mobile devices such as iPhone, iPad, BlackBerry, etc. • Ad hoc approvers, Proxy Approver feature <ul style="list-style-type: none"> ○ Workflow can be configured to allow approvers to be added in ad hoc fashion also includes convenient Proxy features for scheduled absences like vacations/holidays • Attachments

Features		Details
		<ul style="list-style-type: none"> ○ Any electronic attachments can be included as part of the transaction so that approvers have instant access to all information necessary to approve or reject
	c) PeopleSoft enterprise-wide compatible solution.	The Smart ePAR solution is an add-on solution seamlessly integrated into PeopleSoft using native interface features and People Tools mechanisms. The solution is a “bolt-on” that can readily integrate and access data and facilities across the entire PeopleSoft system including the custom Components.
	d) User Configurability.	The solution empowers the individual user to define and alter routing rules and policies when the business requirements change. This replaces the inefficient process of requesting IT support in order to configure workflow capabilities to address immediate needs. Our solution allows for the transaction approval process to be configured by roles and various business rules and can support multiple parallel paths as well as easily accommodate multiple levels of approval. Workflow rules and policies are easy to configure allowing for alternative routing if the primary approvers are not available (Proxy functionality) and for routing within HR for special approvals (rules driven approvals or ad hoc features. The ability to attach any supporting documents, such as an I-9, termination letter, or any supporting documentation is available.
Integration	a) PeopleSoft HCM Release Independent compatible solution.	<p>The Smart ePAR solution was specifically architected, designed and developed as an add-on solution for PeopleSoft. By design and architecture Smart ePAR is independent of PeopleSoft application and Tools versions. This design and architecture shields the solution from changes in future versions.</p> <p>Smart ePAR moves processing of HR transactions from paper forms and manual approval processing to an on-line process from initiation to completion in the PeopleSoft HCM database. Upon final approval by the last Approver, the system can be configured to automatically update the PeopleSoft HCM system tables with the ePAR transaction details. No manual data entry is required. The data tables in PeopleSoft HCM are updated with the ePAR transaction data and rows are created for the related table(s), such as Job or Position.</p>
	b) User configurable for HCM updates	The Smart ePAR solution is configured to automatically update the PeopleSoft HCM system tables (such as Employee data, Job data, Position Data etc.) upon final approval of the transaction. Updating of the HCM data is configured based on a Client basis depending on their actual HCM implementation.

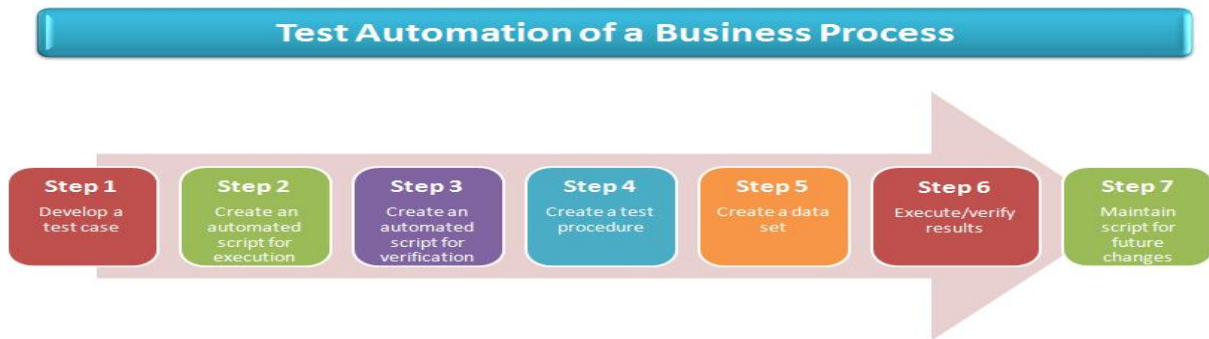
APPENDIX B: TEST AUTOMATION (OPTIONAL SERVICE)

Testing every change manually requires a lot of resources, takes longer, is not efficient and the quality and scope of the test is poor. So, test automation is a necessity in PeopleSoft implementations and upgrades. Our test automation framework accelerates automation of test data creation and extraction, test execution of online transactions, batch and real time interfaces and verification of test results.

Our strategy is to automate testing where it is applicable to increase the coverage, reduce the test cycle time, to perform regression testing of defect fixes in a short period of time and improve quality of testing.

The below table describes the process flow and requirements for creating test automation:

SNo	Description
1	Re-engineer test cases-beef up expected results and include business rules, tables and fields that will be populated by the transaction.
2	For each test case identify master and transactional test data requirements
3	Automate test data setup and creation
4	Automate test execution including UI, API, batch processing and inbound and outbound interfaces.
5	Automate test validation
6	Integrate automated execution and validation components to test a business process



Automation of testing a business process using tools such as PeopleSoft Test Framework and Oracle OpenScrip involve recording of a transaction and customizing the script generated by the tool to make it data driven and also export key information created by the transaction.

APPENDIX II SUPPLEMENTAL OFFER SHEET TERMS AND CONDITIONS


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

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

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

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

RESPONDENT COMPANY NAME Smart ERP Solutions, Inc.

AUTHORIZED SIGNATURE 

TITLE VP, Business Development

DATE 06/02/2014

APPENDIX III CERTIFICATE OF NON-SEGREGATED FACILITIES

We, Smart ERP Solutions, Inc. 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.

**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 Smart ERP Solutions, Inc.

AUTHORIZED SIGNATURE 

TITLE VP, Business Development

DATE 06/02/2014

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: Smart ERP Solutions, Inc.

Authorized Representative's Name: Kirk Chan

Authorized Representative's Signature: 

Date: 06/02/2014