RFP 1325JCSA

UNIVERSITY OF CENTRAL FLORIDA



VB CONSULTING

401 WESTPARK COURT SUITE 200
PEACHTREE CITY, GA 30269
770.302.1707

RFP 1325JCSA

Implementation and Upgrades for PeopleSoft Applications, PeopleTools and Oracle Software and Hardware

ORACLE® **Gold Partner**

ataway | People | Process | Systems and PRJ Consulting Inc. PeopleSoft Solutions Advisors

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

Page 1 of 32 Pages	OFFERS WILL BE OPENED **June 3, 2014** and may not be withdrawn within days after such date and time.	ITN NO: **1325JCSA**
UNIVERSITY MAILING DATE: **May 1, 2014**	ITN TITLE: **ERP Consulting Services for Implementation and Upgrades for PeopleSoft Applications, PeopleTools and Oracle Software and**	
FEDERAL EMPLOYER IDENTIFICATION NUMBER OR S.S. NUMBER 01-0611284		

VENDOR NAME VB Consulting		REASON FOR NO OFFER
VENDOR MAILING ADDRESS 401 Westpark Court Suite 20		
CITY - STATE - ZIP CODE Peachtree City, GA 30269		POSTING OF PROPOSAL TABULATIONS
AREA CODE 770	TELEPHONE NO. 302-1707 ext 1404	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.	

Government Classifications
Check all applicable

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

GENERAL CONDITIONS

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

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

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

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

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

AUTHORIZED SIGNATURE (MANUAL)

AUTHORIZED SIGNATURE (TYPED), TITLE

President / CEO

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.

VB CONSULTING
401 Westpark Court Suite 200
Peachtree City, GA 30269
770-302-1707 ext. 1004
May 29, 2014

Cali Jones
Purchasing Department
12479 Research Parkway
Orlando, FL 32826-3248

RE: Request for Proposal # RFP 1325JCSA

It is our pleasure to submit to you our proposal in response to RFP 1325JCSA. VB Consulting is both eager and fully equipped to continue to successfully deliver PeopleSoft Enterprise services to UCF. Having worked with UCF since 2010, and currently working to implement Undergrad PeopleSoft Academic Advisement, we understand UCF; the culture, the students and the staff.

VB Consulting has thoughtfully partnered with PRJ Consulting and Ataway, Ltd to provide gold standard services that create a synergistic blend from a global, national and local perspective. Furthermore, PRJ, and Ataway have strong reputations of successful delivery of projects and it is our sincere hope that this response underscores the key qualities and values that UCF is looking for in a continued PeopleSoft trusted advisor.

Higher Education Enterprise Sector Insight: Collectively, over the past 20+ years VB Consulting and partners are proud to have been engaged by many Higher Education sector clients to provide enterprise systems consulting and training. This work has allowed us to develop key insights into the challenges and opportunities with large system integrations in the Higher Education.

Extensive Oracle/PeopleSoft Experience: VB Consulting is an Oracle/PeopleSoft Global known and trusted provider of talent as well as a company that's integrity and approach resonates and matches shared core values that we rely on to meet and/or exceed our client's expectations. Our team's quality and value continues to be recognized as a leader in the marketplace locally, nationally, and globally.

Significant PeopleSoft implementations, upgrades and training experience: Oracle-PeopleSoft practices are leaders in providing professional services to the Higher Ed Enterprise market in the United States and internationally. Specifically, our enterprise system consulting delivery experience includes projects recently completed or underway:

- UCF Graduate Studies Academic Advisement Implementation from DARS
- Upgrade HCM version 9.1 at Ventura County, CA
- Upgrade and company consolidation Finance version 9.1 at FedEx, Worldwide
- CSU Los Angeles and Bakersfield converting from quarters to semesters

"Under one Tent": VB Consulting, and with our strategic partnerships is an organization that, "under one tent", has the experience, integrated tools and market recognition to fully integrate the human capital, internal controls, change management, PeopleSoft ERP, strategy, Oracle, and IT work necessary to realize this technology transformation project.

Ultimately, the most important reason to award this work to VB Consulting is our existing relationship with University of Central Florida coupled with our knowledge and expertise.

Thank you and we look forward to earning more of your business.

Sincerely,

Vidaurie B. Lee, President/CEO



UNIVERSITY OF CENTRAL FLORIDA

INVITATION TO NEGOTIATE (ITN) NUMBER 1325JCSA

FOR

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

Table of Contents

1.0 INTRODUCTION **7**
2.0 GENERAL CONDITIONS **8**
3.0 REQUIRED OFFER FORMAT **24**
3.1 Introduction 24
3.2 Respondent/Offer Submittal Sections 25
A. Experience And Qualifications PeopleSoft applications 25
B. Services Offered 36
C. Consulting Scope and Cost to University 40
D. Prior Experience with a Large, Complex, Multi-Campus Higher Education Institution 41
CSUDH Project Scope **42**
E. Demonstrated Ability to Meet Requested Project Time Lines 42
4.0 OTHER REQUIREMENTS **43**
APPENDIX I EVALUATION SCORING SHEET 44
APPENDIX V-Resumes **52**

INTRODUCTION

Statement of Objective

The objective of this Invitation to Negotiate (ITN) is to enable the University of Central Florida (UCF) to enter into a contract with one or more qualified consulting companies to assist UCF's implementation, enhancement, support and upgrades of PeopleSoft Campus Solutions, Human Capital Management, Financials, CRM, Interaction Hub, PeopleTools 8.52 and higher, Academic Advisement, Mobile Web Development with integration to PeopleSoft applications and analytical tools including, but not limited to OBIEE and Hyperion. Assistance with systems administration functions relating to patches, upgrades, performance tuning, server configurations and security. Assistance with database administration functions relating to upgrades, performance tuning, configurations and security. The University is in production use of PeopleSoft Campus Solutions 9.0, Human Capital Management 9.0, PeopleSoft Interaction Hub 9.1, Financials 9.1 and CRM 9.1.

The Successful Respondent, if any, will enter into a contract with UCF that provides for the performance of all terms and conditions set forth in this ITN, unless UCF has agreed to accept or negotiate certain terms and conditions, as described in Section 2.3. Non-negotiable terms and conditions (as indicated on Appendix II) must always be performed by the Respondent.

Contract Award

A. UCF intends to award a contract or contracts resulting from this solicitation to the responsible Respondent(s) whose offer represents the best value after evaluation in accordance with the criteria in this solicitation.

B. UCF may reject any or all offers if such action is in UCF's best interest. C.

UCF may waive informalities and minor irregularities in offers received.

D. UCF reserves the right to evaluate an offer and award a contract without negotiations. Therefore, the offerer's initial offer should contain the offerer's best terms from a cost or price and technical standpoint.

E. UCF reserves the right to conduct negotiations with the highest ranked offerer(s).

F. UCF reserves the right to make an award on any item for a quantity less than the quantity offered, at the unit cost or prices offered, unless the respondent specifies otherwise in the offer.

G. UCF reserves the right to make multiple awards if, after considering the additional administrative costs, it is in UCF's best interest to do so.

H. A written notice of award will be sent to the successful respondent(s).

UCF Environment

The University of Central Florida is a comprehensive coeducational institution offering undergraduate, graduate, medical, and international programs, and is part of the State University System of Florida.

The University of Central Florida and its 12 colleges provide opportunities to over 60,000 students from all 50 states and 140 countries. UCF employs approximately 10,000 faculty and staff. Offering 212 degree programs, it has become an academic and research leader in numerous fields, such as optics, modeling and simulation, engineering and computer science, business administration, education,

science, hospitality management and digital media.

UCF's 1,415-acre main campus provides modern facilities, most of which have wireless connectivity, with 600 acres set aside for lakes, woods and an arboretum. UCF has 12 colleges, including the newly established College of Medicine. More than 60,000 students attend classes on UCF's main campus and its 9 regional campuses located throughout Central Florida. UCF has granted more than 250,000 degrees in its 45 years of offering classes.

About 5,800 students live on campus in college facilities and 8,000 – 10,000 within walking distance to campus in private facilities. The balance of the student body either commutes or is enrolled in branch campuses in Cocoa, Daytona Beach, South Orlando or the Rosen College of Hospitality Management.

UCF currently uses a mixed hardware environment including Sun Solaris, Windows Server 2012, F5 load balancing, VMWare and others. UCF has a robust architecture that includes high availability options, data redundancy and disaster recovery.

Additional information available at: http://www.ucf.edu/about-ucf/

GENERAL CONDITIONS

Authorized UCF Representative/Public Notices/UCF Discretion

Respondent's response to this ITN and any communications and/or inquiries by Respondent during this ITN process must be submitted in writing to the individual and address stated below. **Inquiries are preferred via email**. UCF will consider only those communications and/or inquiries submitted in writing to the individual below on or before the date and time specified in Section 2.2, "Calendar of Events." To the extent UCF determines, in its sole discretion, to respond to any communications and/or inquiries, such response will be made in writing and mailed/emailed to all Respondents. UCF shall not accept or consider any written or other communications and/or inquiries (except an offer) made between the date of this deadline and the posting of an award, if any, under this ITN.

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

Advance notice of public meetings regarding this ITN, if UCF determines at its sole discretion whether any such meetings will be held, will be in writing and posted in UCF's Purchasing Department, 12479 Research Parkway. Additionally, any portion of a meeting at which a negotiation with a vendor is conducted pursuant to a competitive solicitation at which a vendor makes an oral presentation or at which a vendor answers questions is exempt from s. 286.011 and s. 24(b), Art. I of the State Constitution. This also includes any portion of a team meeting at which negotiation strategies are discussed. All such meetings shall be conducted in accordance with Chapter 286 of the Florida Statutes. UCF also reserves the right and sole discretion to REJECT any offer at any time on grounds that

include, without limitation, either that an offer is nonresponsive to the ITN or is incomplete or irregular in any way, or that a responsive offer is not in UCF's best interest.

Approximate Calendar of Events

Listed below are the dates and times by which stated actions should be taken or completed. If UCF determines, in its sole discretion, that it is necessary to change any of these dates and times, it will issue an Addendum to this ITN. All listed times are local time in Orlando, Florida.

Date/Time	Action
May 1, 2014	Invitation To Negotiate advertised
May 1, 2014	Invitation To Negotiate released
May 15, 2014; 2:00 p.m.	Last Day to submit communications and/or inquiries in writing only to the person listed in section 2.1; preferably by email. .
May 20, 2014	Responses to inquiries and Addenda, if any, mailed to Respondents
June 3, 2014; 2:00 p.m.	Deadline for Offer submission at 2:00 p.m. (ITN opening)

Respondent Communications and/or Inquiries

A. UCF is not liable for interpretations/misinterpretations or other errors or omissions made by the Respondent in responding to this ITN. The Respondent shall examine this ITN to determine if UCF's conditions and requirements are clearly stated. If, after examination of the various conditions and requirements of this ITN, the Respondent believes there are any conditions or requirements which remain unclear or which restrict competition, the Respondent may request, in writing, that UCF clarify or change condition(s) or requirement(s) specified by the Respondent. The Respondent must provide the Section(s), Subsection(s), and Paragraph(s), that identify the conditions or requirements questioned by the Respondent. The Respondent also must provide detailed justification for a change, and must recommend specific written changes to the specified condition(s) or requirement(s). Requests for changes to this ITN must be received by UCF not later than the date shown in Section 2.2., entitled "Calendar of Events," for the submittal of written communications and/or inquiries. UCF shall not make any changes to any of the non-negotiable terms and conditions. The non-negotiable terms and conditions are indicated on Appendix II. Requests for changes to the non-negotiable provisions of this ITN shall automatically be rejected. Requests for changes to anything other than the non-negotiable provisions of this ITN may or may not be accepted by UCF and may or may not be negotiated by UCF, all at UCF's sole discretion.

B. Any Respondent disagreeing with any terms and conditions set forth in this ITN shall indicate on Appendix II, Terms and Conditions Supplemental Offer Sheet, the specific ITN section(s) the Respondent disagrees with and shall provide a clear and detailed reason for the disagreement and a solution to the disagreement, in his/her offer, all PRIOR TO the deadline stated in Section 2.2 "Calendar of Events." UCF may or may not accept or agree to negotiate any of the terms and conditions that Respondents indicated as disagreeing with, all at UCF's sole discretion. The indication of disagreement with any non-negotiable terms and conditions shall be automatically rejected.

C. Failure to submit Appendix II and clearly indicating which terms and conditions the Respondent agrees and disagrees with (i.e. failure to initial the designated sections set forth on Appendix II, indicating that the Respondent has either understood and agreed to or disagreed with each particular section listed on Appendix II) and/or clear and detailed reasons for the disagreement, with the offer, all prior to the deadline stated in Section 2.2. "Calendar of Events," shall be grounds for rejection of that offer, at UCF's sole discretion. UCF may or may not accept and/or negotiate any such terms and conditions

that the Respondent disagreed with. If UCF decides not to accept any of the terms and conditions the Respondent disagreed with, UCF shall have the right, at UCF's sole discretion to exercise its right to reject the tentative awardee's offer and proceed to the next highest ranked respondent. As noted above, the disagreement with any non-negotiable terms and conditions by the

Respondent shall be automatically rejected.

D. UCF shall at its sole discretion determine what requested changes to this ITN and the resulting agreement are acceptable. Non-negotiable terms and conditions, as indicated on Appendix II will always stay as they are and any requested changes to such clauses shall automatically be rejected. UCF shall issue an Addendum reflecting the acceptable changes to this ITN, if any, which shall be sent to all Respondents as specified in Section 2.1.

E. Any communications, questions and/or inquiries from the Respondent concerning this ITN in any way must be submitted in writing to the individual identified in Section 2.1 not later than **May 15, 2014 at 2:00 p.m.** Eastern Time as set forth in the Calendar of Events. Written inquiries must be legible and concise and must clearly identify the Respondent who is submitting the inquiry.

Respondents' Conference and Site Visit

None

Written Addenda

Written Addenda to this ITN along with an Addenda Acknowledgment Form will be mailed to all Respondents. The Addenda Acknowledgment Form shall be signed by an authorized representative of the Respondent, dated and returned with the offer.

Offer/Proposal Opening Date

Respondent's response to this ITN shall be prepared in accordance with Section 3.0, "Required Offer Format". Offers are due at the time and date specified in Section 2.2, "Calendar of Events" and must be received by UCF's Authorized Representative in UCF's Purchasing Department, Orlando Tech Center, 12479 Research Parkway, Orlando, FL 32826, no later than **2:00 p.m.** on **June 3, 2014** according to the time clock in UCF's Purchasing Department. Offers or amendments to offer that arrive after **2:00 p.m.** on **June 3, 2014** will not be accepted/considered for any reason whatsoever. Telephone, including facsimile and electronic mail, and telegraphic negotiations and/or amendments to offers shall not be accepted at any time. At **2:00 p.m.** on **June 3, 2014**, all timely offers will be opened for the sole purpose of recording the names of the Respondents submitting written offers. Purchasing will not extend the proposal opening to accommodate vendors that did not discover the ITN early enough to submit a proposal.

If Respondent elects to mail in his/her offer package, the Respondent must allow sufficient time to ensure UCF's proper receipt of the offer package by the time specified above. Regardless of the form of delivery, it is the responsibility of the Respondent to ensure that the offer package arrives at UCF's Purchasing Department no later than **2:00 p.m.** on **June 3, 2014.**

Offers will be accepted up to, and no offers may be withdrawn after, the deadline for offer submission time and date shown above. Offers must be delivered in sealed envelopes clearly marked: **ITN1325JCSA ERP Consulting Services for Implementation and Upgrades for PeopleSoft**

Applications, PeopleTools and Oracle Software and Hardware. The offer must be submitted with seven **(7) copies; one hard copy and six (6) electronic versions on either disc or thumb drive.** The hard one copy needs to contain original signatures of the Respondent's authorized representatives on the document titled "INVITATION TO NEGOTIATE ACKNOWLEDGMENT FORM (Form ITN/CS)." All copies of proposals whether they are electronic or hard copy must be complete sets in every way, with all information the proposer desires to be evaluated. UCF will not be responsible for any proposal's low score during the evaluation process that results from any of the proposals (hard or electronic copy) having incomplete information and or omitted documents. UCF will not be responsible for making copies of any omitted or missing documents to complete any submitted proposal.

Section Not Used

Evaluation Criteria and Selection Process

A. UCF reserves the right to conduct negotiations if the decision maker (Vice President/Dean or his/her written designee(s) with the advice and consent of the Purchasing Director determines negotiations to be in the best interest of the university. Any portion of a meeting at which a negotiation with a vendor is conducted pursuant to a competitive solicitation is exempt from s. 286.011 and s. 24(b), Art. I of the State Constitution. Discussions with vendors after receipt of an offer do not constitute a rejection, counteroffer or acceptance by UCF.

B. UCF reserves the right to conduct negotiations with the highest ranked offerer(s). In the event the decision maker determines it to be in UCF's best interest to enter into negotiations, he/she after receiving the advice and consent of the Purchasing Director shall:

1. Establish an evaluation committee tailored for the particular acquisition that includes appropriate expertise to ensure a comprehensive evaluation of offers. The committee will review all responsive offers and develop a ranked order of vendors based on the points given each evaluation criteria contained herein;
2. Develop the acquisition plan (strategy to award with or without negotiations) after review of offers;
3. Ensure consistency among the solicitation requirements, notices to respondents, offer preparation instructions, evaluation criteria, solicitation provisions or contract clauses, and data requirements;
4. Ensure that offers are evaluated based solely on the evaluation criteria contained in the solicitation;
5. Consider the recommendations of the evaluation committee in determining which offerer(s) to enter into negotiations; and
6. Select the negotiation team. This can be the evaluation team or any other individual(s) the decision maker deems necessary for the acquisition. The negotiation team will invite the highest ranked offerer(s) falling within the desired competitive range to enter into negotiations.

C. All offers shall be initially evaluated based on weighted criteria set forth in the table below by members of an evaluation committee. Such committee shall consist of three (3) or more individuals who have expertise regarding, or some experience with, the subject matter of the ITN or, if none, then individuals who could be characterized as recipients, beneficiaries, or users of the ITN's subject matter. The Chief Technology Officer or his/her written designee(s) will appoint the evaluation committee members. Committee members, at the discretion of the Chief Technology Officer or his/her written

designee(s), shall have the option to meet as a group any time during formulation of the specifications and solicitation stage to discuss and correct any concerns and ambiguities of the solicitation and specifications. This privilege shall be rescinded upon opening of the offers. After offer opening, each evaluation committee member shall function independently of all other persons including, without limitations, the other committee members, and, throughout the entire evaluation process, each evaluation committee member is strictly prohibited from meeting with or otherwise discussing this ITN and any aspect thereof including, without limitation, the offers and their content with any other individual whatsoever. Each evaluation committee member shall conduct an independent evaluation of the offers in accordance with the weighted evaluation criteria set forth in the following Table A:

Table A – Evaluation of Responses

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

Each evaluation committee member must independently score, in writing, each offer on the form depicted in **APPENDIX I**. Each evaluation committee member shall enter comments, if any, regarding the offer and then sign the completed score forms and deliver them, in a sealed envelope, to the **Purchasing Person identified in section 2.1.**, who will forward copies to the **Decision Maker**, or his/her designee. At the time of such delivery to the **Purchasing Person**, the evaluation committee members shall cease to participate further in this ITN process unless expressly requested otherwise by **Decision Maker.**

The **Decision Maker** shall review, in the manner and to the extent he/she deems reasonable under the circumstances, the ITN, the offers, and committee members' scoring forms. While not bound to them, the **Decision Maker** may give deference to the scoring forms. Based on what the **Decision Maker** determines is in the best interest of UCF, the **Decision Maker** will then make the final decision whether or not to recommend the award of a contract to a Respondent to this ITN, negotiate with the highest ranked respondent(s) or cancel the ITN.

The **Decision Maker** may, at any time during this ITN process, assign one (1) or more UCF staff member(s) to assist the **Decision Maker's** review prior to his/her decision-making in this process. UCF is not obligated to make an award under or as a result of this ITN or to award such contract, if any, on the basis of lowest cost or highest commission offered. UCF reserves the right to award such contract, if any, to the Respondent(s) submitting an offer that UCF, at its sole discretion, determines is in UCF's best interest.

Posting of Recommended Selection

Intent to award will be posted within a reasonable time when the Purchasing Department receives the decision maker's notice of recommended award decision.. The recommendation to award a contract, if any, to a Respondent(s) to this ITN will be posted for review by interested parties in the Purchasing Department and will remain posted for a period of seventy-two (72) hours (three (3) business days).

A. If the Respondent desires to protest the recommendation to award a contract, if any, the Respondent must file with UCF:
   1. A written notice of intent to protest within seventy-two (72) hours (three (3) business days) of the posting of the recommended award. UCF shall not extend or waive this time requirement for any reason whatsoever.
   2. A formal written protest by petition within ten (10) calendar days of the date on which the notice of intent to protest is filed. UCF shall not extend or waive this time requirement for any reason whatsoever.

B. Failure to file in writing either a notice of intent to protest or a formal protest by petition within the time prescribed in UCF Regulation 7.130(5), shall constitute a waiver of proceedings under that regulation.

C. A formal written protest by petition must be accompanied by a Protest Bond payable to UCF in the amount of $10,000 or 10% of UCF's estimate of the total value of the offered contract, whichever is less. The form of the Protest Bond shall be a cashier's check or money order made payable to UCF.

D. In addition to all other conditions and requirements of this ITN, UCF shall not be obligated to pay for information obtained from or through the Respondent.

Offer Validity Period

Any submitted offer, shall in its entirety, remain a valid offer for **120** days after the offer submission date.

Disposition of Offers; Florida Public Records Law Compliance

All offers become the property of the State of Florida, and the State of Florida shall have the right to use all ideas, and/or adaptations of those ideas, contained in any offer received in response to this solicitation. Any parts of the offer or any other material(s) submitted to UCF with the offer that are copyrighted or expressly marked as "confidential", "proprietary", or "trade secret", will only be exempted from the "open records" disclosure requirements of Chapter 119, Florida Statutes, if Florida law specifically recognizes these materials as exempt from disclosure. Thus, the mere designation as "confidential", "proprietary", or "trade secret" by a vendor does not ensure that such materials will be exempt from disclosure. In the absence of a specific Florida statute exempting material from the public

records law, UCF is legally obligated to produce any and all public records produced or received in the course of conducting university business, irrespective of any designation by the vendor of those same records as "confidential", "proprietary", or "trade secret." The ultimate determination of whether a vendor's claim of "confidential," "proprietary" or "trade secret" will support an exemption from disclosure will be made by UCF or, potentially, a court. UCF's selection or rejection of an offer will not affect this provision.

Economy of Presentation

Each offer shall be prepared simply and economically, providing a straightforward, concise description of the Respondent's capabilities to satisfy the conditions and requirements of this ITN. Fancy bindings, colored displays, and promotional material are not desired. Emphasis in each offer must be on completeness and clarity of content. To expedite the evaluation of offers, it is **mandatory** that Respondents follow the format and instructions contained herein. UCF is not liable for any costs incurred by any Respondent in responding to this ITN including, without limitation, costs for oral presentations requested by UCF, if any.

Restricted Discussions/Submissions

From the date of issuance of the ITN until UCF announces its intent to negotiate, the Respondent shall not discuss the offer or any part thereof with any employee, agent, or representative of UCF except as expressly requested by UCF in writing. Violation of this restriction will result in REJECTION of the Respondent's offer.

Verbal Instructions Procedure

No negotiations, decisions, or actions shall be initiated or executed by the Respondent as a result of any discussions with any UCF employee. Only those communications that are in writing from the authorized UCF representative identified in Section 2.1. of this ITN that have been approved in writing by UCF's President or the President's designee shall be considered as a duly authauthorized expressions on behalf of the Respondent.

State Licensing Requirements

All corporations seeking to do business with the State of Florida shall, at the time of submitting an offer in response to this ITN, either be on file or have applied for registration with the Florida Department of State in accordance with the provisions of Chapter 607, Florida Statutes. A copy of the registration/application must be furnished to UCF when submitting the offer. The successful Respondent, if any, shall be on file with the Florida Department of State at the time of execution of a contract resulting from this ITN, if any. Similarly partnerships seeking to do business with the State shall, at the time of submitting such an offer, have complied with the applicable provisions of Chapter 620, Florida Statutes. A statement shall be required indicating that the Respondent is a corporation or other legal entity. If subcontractors are used, a statement shall also be required indicating that all subcontractors are registered with the State of Florida in accordance with Chapter 607 or 620, Florida Statutes, providing their corporate charter numbers. For additional information, the Respondent shall contact the Florida Secretary of State's Office at (904) 488-9000.

Parking

Respondent/Vendor(s) shall ensure that all vehicles parked on campus for purposes relating to work resulting from an agreement shall have proper parking permits. This applies to all personal vehicles and all marked and unmarked company vehicles that will be on any University campus for one (1) day or more or on a recurring basis. All such vehicles must be registered with University's Parking Services Department, and parking permits must be purchased by the Respondent/Vendor. Respondent's/Vendor's vehicle(s) shall observe all parking rules and regulations. Failure to obtain parking permits, properly display them, and otherwise comply with all of University's parking rules and regulations could result in the issuance of a parking ticket and/or towing at the expense of Respondent/Vendor or Respondent's/Vendor's employees. For additional parking information or information regarding parking fees/rates, contact University's Parking Services Department at (407)
823-5812 or online at http://parking.ucf.edu.

Definitions

UCF'S Contract Administrator - The University has designated liaison with the Respondent. In this matter, UCF's Contract Administrator will be Cali Jones.

Respondent/Offerer/Vendor/Contractor - Anyone who submits a timely offer in response to this ITN.

Successful Respondent/Contractor - The firm or individual who is the recommended recipient of the award of a contract under this ITN (also synonymous with "Payee", "Offerer", and "Vendor").

Contract/Agreement - The formal bilateral agreement signed by a representative of the University and the Vendor which incorporates the requirements and conditions listed in this ITN and the Vendor's offer.

Project Manager - After contract award a liaison from the user department will oversee the Contractor's performance and report as needed to the contract administrator. The Project Manager is Elizabeth Hale.

Procurement Rules

A. UCF has established for purposes of this ITN that the words "shall", "must", or "will" are equivalent in this ITN and indicate a mandatory requirement or condition, the material deviation from which shall not be waived by UCF. UCF will, at UCF's sole discretion, determine whether a deviation is material. Any deviation found by UCF to be material shall result in the rejection of the offer.

B. The words "should" or "may" are equivalent in this ITN and indicate very desirable conditions, or requirements but are permissive in nature. Deviation from, or omission of, such a desirable condition or requirement will not in and of itself cause automatic rejection of a offer, but may result in the offer being considered as not in the best interest of UCF. UCF will, at UCF's sole discretion, determine whether an offer is considered as not in the best interest of UCF and may or may not reject the offer, all at UCF's sole discretion.

C. The Respondent must comply with the instructions cited in Section 2.3. Also, the Respondent must initial the designated sections set forth on Appendix II, indicating that the Respondent has either understood and agreed to or disagreed with each particular section listed on Appendix II. Failure to submit Appendix II with each area marked as set forth above and initialed by the Respondent shall constitute grounds for rejection of the offer by UCF and shall give UCF the right to reject the offer, at UCF's sole discretion.

D. The Respondent is solely responsible for the accuracy and completeness of its offer. The Respondent's errors or omissions, if any, are solely at the risk of the Respondent and may be grounds for rejection of the offer and shall give UCF the right to reject the offer, at UCF's sole discretion.

Force Majeure

No default, delay or failure to perform on the part of UCF or the Respondent shall be considered a default, delay or failure to perform otherwise chargeable, hereunder, if such default, delay or failure to perform is due to causes beyond UCF's reasonable control including, but not limited to, strikes, lockouts, actions or inactions of governmental authorities, epidemics, war, embargoes, fire, earthquake, acts of God, default of common carrier. In the event of such default, delay, or failure to perform due to causes beyond UCF's or the Respondent's reasonable control, any date or times by which UCF or the

Respondent is otherwise scheduled to perform shall be extended automatically for a period of time equal in duration to the time lost by reason of the cause beyond the reasonable control of UCF or the Respondent.

Limitation of Remedies, Indemnification, and Insurance

A. The Attorney General of the State of Florida has rendered an opinion that agencies of the State of Florida cannot contractually limit the State's right to redress. Consequently, any offer by Respondent to limit the Respondent's liabilities to the State or to limit the State's remedies against the Respondent is unacceptable and will result in the REJECTION of the Respondent's offer.

B. As an agency of the State of Florida, UCF's liability is regulated by Florida law. Except for its' employees acting within the course and scope of their employment, UCF shall not indemnify any entity or person. The State of Florida is self-insured to the extent of its liability under law and any liability in excess of that specified in statute may be awarded only through special legislative action. Accordingly, UCF's liability and indemnification obligations under this ITN and the resulting contract, if any, shall be effective only to the extent required by Florida law; and any provision requiring UCF to provide insurance coverage other than the State of Florida self-insurance shall not be effective.

C. Respondent(s)/Vendor(s)/Payee(s)/Offerer(s) shall hold the University and the UCF Board of Trustees and the University's officers, employees, agents and/or servants harmless and indemnify each of them against any and all liabilities, actions, damages, suits, proceedings, and judgments from claims arising or resulting from the acts or omissions of Respondent(s)/Vendor(s)/Payee(s)/Offerer(s), its employees, its agents or of others under Respondent's/Vendor's/Payee's/Offerer's control and supervision. If any part of a delivery to the University pursuant to a contract resulting from this ITN is protected by any patent, copyright, trademark, other intellectual property right or other right, Respondent/Vendor/Payee/Offerer also shall indemnify and hold harmless the University and the UCF Board of Trustees and the University's officers, employees, agents and/or servants from and against any and all liabilities, actions, damages, suits, proceedings and judgments from claims instituted or recovered against the University by any person or persons whomsoever on account of the University's use or sale of such article in violation of rights under such patent, copyright, trademark, other intellectual property right or other right.

For all purchases of $10,000 or below, Respondent/Vendor/Payee/Offerer will have and maintain types and amounts of insurance that at a minimum cover the Respondent's/Vendor's/Payee's/Offerer's (or subcontractor's) exposure in performing a contract resulting from this ITN. For all purchases that

exceed $10,000 (i.e. $10,000.01 and up) and/or all purchases that require a UCF Safe Form, Respondent/Vendor/Payee/Offerer will have and maintain general liability insurance of one (1) million dollars and Respondent/Vendor/Payee/Offerer shall send a copy of his/her insurance certificate (prior to commencement of his/her performance or delivery hereunder) to the following address by email, fax or mail:

E-mail: ehs@ucf.edu
Fax: 407-823-0146
Mail: University of Central Florida
PO Box 163500
Orlando FL 32816-3500

UCF has the right to deviate from any of the above insurance requirements, if UCF, at UCF's sole discretion decides to do so. If UCF decides to deviate from the above noted insurance requirements, UCF will inform the Respondent/Vendor/Payee/Offerer in writing in those particular circumstances. Unless UCF notifies a Respondent/Vendor/Payee/Offerer in writing that UCF is willing to deviate from the insurance requirements noted above, all of the above insurance requirements shall apply to the Respondent/Vendor/Payee/Offerer. The University and its Board of Trustees shall be listed as additional insured on any certificate issued and the Certificate Holder is to read the following:

University of Central Florida
Board of Trustees
4000 Central Florida Blvd.
Orlando FL 32816

D. WORKER'S COMPENSATION: During the contract term, the contractor at its sole expense shall provide commercial insurance of such a type and with such terms and limits as may be reasonably associated with the contract, which, as a minimum, shall be: workers' compensation and employer's liability insurance in accordance with Florida Statutes Chapter 440, with minimum employers' liability limits of $100,000 per accident, $100,000 per person, and $500,000 policy aggregate. Such policy shall cover all employees engaged in any contract work.

Employers who have employees who are engaged in work in Florida must use Florida rates, rules, and classifications for those employees. In the construction industry, only corporate officers of a corporation or any group of affiliated corporations may elect to be exempt from workers' compensation coverage requirements. Such exemptions are limited to a maximum of three per corporation and each exemption holder must own at least 10% of the corporation. Independent contractors, sole proprietors and partners in the construction industry cannot elect to be exempt and must maintain workers' compensation insurance.

Term of Contract

The contract resulting from this ITN, if any, shall commence on or about **July 15, 2014** and shall end on **June 30, 2017**. The resultant contract will have five (5) one (1) year options to renew that shall automatically renew at the expiration of any term unless either party notifies the other within 60 days of expiration that they do not intend to renew the contract.

Termination of Contract

The parties to a resultant contract may terminate the contract at any time by mutually consenting in writing. Either party may terminate a resultant contract immediately for breach by the other that remains substantially uncured after thirty (30) days' advanced written notice to the breaching party, which notice describes the breach in detail sufficient to permit cure by the breaching party. The University shall be liable only for payment for services satisfactorily rendered/goods satisfactorily delivered and accepted from the date of commencement until the effective date of termination

Assignment and Amendment of Contract

Neither the contract resulting from this ITN, if any, nor any duties or obligations under such contract shall be assignable by the Respondent without the prior written consent of UCF. Any contract resulting from this ITN may be amended only in writing signed by the Respondent and UCF with the same degree of formality evidenced in the contract resulting from this ITN.

Independent Parties

Except as expressly provided otherwise in the contract resulting from this ITN, if any, UCF and the Respondent shall remain independent parties and neither shall be an officer, employee, agent, representative or co-partner of, or a joint venture with, the other.

Performance Investigations

As part of its evaluation process, UCF may make investigations to determine the ability of the Respondent to perform under this ITN. UCF reserves the right to REJECT any offer if the Respondent fails to satisfy UCF that it is properly qualified to carry out the obligations under this ITN.

Records

The Respondent/Vendor/Payee/Offerer agrees to keep and maintain, separate and independent records, in accordance with generally accepted accounting principles, devoted exclusively to its obligations and activities pursuant to a contract resulting from this ITN. Such records (including books, ledgers, journals, and accounts) shall contain all entries reflecting the business operations under a resultant contract. University or its authorized agent shall have the right to audit and inspect such records from time to time during the term of a resultant contract, upon reasonable notice to the Payee.

Public Records

Any contract resulting from this ITN may be canceled unilaterally by the University for refusal by the Respondent/Vendor/Payee/Offerer to allow public access to all papers, documents, letters or other material subject to the provisions of Chapter 119, Florida Statutes, and made or received by the Respondent/Vendor/Payee/Offerer in conjunction with a resultant contract.

Public Record, Contract For Services

A. Keep and maintain public records that ordinarily and necessarily would be required by the public agency in order to perform the service.
B. Provide the public with access to public records on the same terms and conditions that the public agency would provide the records and at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes, or as otherwise provided by law.
C. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law.

D. Meet all requirements for retaining public records and transfer, at no cost, to the public agency all public records in possession of the contractor upon termination of the contract and destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the public agency in a format that is compatible with the information technology systems of the public agency.

If Payee does not comply with a public records request, University shall enforce the contract provisions in accordance with the contract.

Severability

If any provision of the contract resulting from this ITN, if any, is contrary to, prohibited by, or deemed invalid by applicable laws or regulations of any jurisdiction in which it is sought to be enforced, then said provision shall be deemed inapplicable and omitted and shall not invalidate the remaining provisions of such contract.

Notices

All notices and all other matters pertaining to the contract resulting from this ITN, if any, to a party shall be in writing, shall be hand delivered, or sent by registered or certified U.S. Mail, return receipt requested, and shall be deemed to have been duly given when actually received by the addressee at the address listed in section 2.1 of this ITN.

Governing Law and Venue

This ITN and resulting contract, if any, and any disputes thereunder will be governed by the laws of the State of Florida and shall be deemed to have been executed and entered into in the State of Florida. Any such contract shall be construed, performed, and enforced in all respects in accordance with the laws and rules of the State of Florida, and any provision in such contract in conflict with Florida law and rules shall be void and of no effect. UCF and Respondent hereby agree that this ITN and resulting contract, if any, shall be enforced in the courts of the State of Florida and that venue shall always be in Orange County, Florida.

Liaison

UCF's liaison with the successful Respondent, if any, shall be **Elizabeth Hale, Director Enterprise Application Development, Computer Services and Telecommunications.**

Subcontracts

The Respondent is fully responsible for all work performed under the contract resulting from this ITN, if any. The Respondent may, with the prior written consent of UCF, enter into written subcontract(s) for performance of certain of its functions under such contract. The subcontractors and the amount of the subcontract(s) shall be identified in the Respondent's response to this ITN. No subcontract shall be implemented or effective until approved in writing by UCF. No subcontract(s), which the Respondent enters into under the contract resulting from this ITN, if any, shall in any way relieve the Respondent of any responsibility for performance of its duties under such contract. Respondent is responsible to fully notify any subcontractor(s) of their responsibilities under any subcontract. All payments to subcontractors shall be the sole responsibility of the Respondent.

Employment of UCF Personnel

The Respondent shall not, without UCF's prior written consent, knowingly recruit for engagement, on a full time, part time, or other basis during the period of this ITN and any resulting contract, any individuals who are or have been UCF employees at any time during such period, except for UCF's regularly retired employees, or any adversely affected State employees.

Conflict of Interest

Acceptance of a contract resulting from this ITN shall certify that Payee is aware of the requirements of Chapter 112, Florida Statutes and in compliance with the requirements of Chapter 112, Florida Statutes and other laws and regulations concerning conflicts of interests in dealing with entities of the State of Florida. Payee certifies that its directors and/or principal officers are not employed and/or affiliated with the University unless a current Conflict of Interest (Report of Outside Activity/Employment) form has been completed, executed by such director or officer and approved in accordance with applicable University policies or rules. Violation of this section by Payee shall be grounds for cancellation of a contract resulting from this ITN.

Equal Opportunity Statement

The State of Florida and UCF subscribe to equal opportunity practices, which conform to both the spirit and the letter of all laws against discrimination and are committed to non-discrimination on the basis of race, creed, color, sex, age, national origin, religion, veteran or marital status, or disability. Respondent commits to the following:

A. The provisions of Executive Order 11246, September 24, 1965, as amended by Executive Order 11375, and the rules, regulations and relevant orders of the Secretary of Labor that are applicable to each order placed against the contract resulting from this ITN, if any, regardless of value.

B. The Respondent, if any, awarded a contract under this ITN shall agree to comply with the Americans with Disabilities Act (ADA) of 1990.

C. If the Respondent anticipates receiving $10,000 in orders during the first 12 months of the contract, if any, resulting from this ITN, Respondent must complete a Certificate of Non-Segregated Facilities form and attach the form to the offer. A sample certificate is attached as **APPENDIX III**.

D. If the Respondent anticipates receiving $50,000 in orders during the first 12 months of the contract, if any, resulting from this ITN, and employs more than 50 people, the Respondent must complete and file prior to March 1 of each year a standard form 100 (EEO-1).

E. If the Respondent anticipates receiving $50,000 in orders during the first 12 months of the contract, if any, resulting from this ITN, and employs more than 50 people, the Respondent must maintain a written program for affirmative action compliance that is accessible for review upon request by UCF.

F. Respondents shall identify their company's government classification at time of offer submittal (See UCF Form ITN/CS: ITN acknowledgement cover page). Respondent's identity will not foster special consideration during this ITN process; this is only for informational purposes for reporting.

Waiver of Rights and Breaches

No failure or delay by a party hereto to insist on the strict performance of any term of a contract resulting from this ITN, or to exercise any right or remedy consequent to a breach thereof, shall constitute a waiver of any breach or any subsequent breach of such term. No waiver of any breach hereunder shall affect or alter the remaining terms of such a contract, but each and every term of such a contract shall continue in full force and effect with respect to any other then existing or subsequent breach thereof. The remedies provided in such a contract are cumulative and not exclusive of the remedies provided by law or in equity.

Headings Not Controlling

Headings used in any contract resulting from this ITN are for reference purposes only and shall not be considered to be a substantive part of such contract.

Employee Involvement/Covenant Against Contingent Fees

In accordance with Section 112.3185, Florida Statutes, the Respondent hereby certifies that, to the best of its knowledge and belief, no individual employed by the Respondent or subcontracted by the Respondent has an immediate relationship to any employee of UCF who was directly or indirectly involved in any way in the procurement of the contract, if any, resulting from this ITN or goods or services thereunder. Violation of this section by Respondent shall be grounds for cancellation of such contract. The Respondent also warrants that no person or selling agency has been employed, engaged or retained to solicit or secure any contract resulting from this ITN or any advantage hereunder upon an agreement or understanding for a commission, percentage, brokerage or contingent fee, or in exchange for any substantial consideration bargained for, excepting that which is provided to the Respondent's bona fide employees or to bona fide professional commercial or selling agencies or in the exercise of reasonable diligence should have been known by the State to be maintained by the Respondent for the purpose of securing business for Respondent. In the event of the Respondent's breach or violation of this warranty, UCF shall, subject to Respondent's rights under Chapter 120, Florida Statutes, have the right, at its option, to annul any contract resulting from this ITN without liability, to deduct from the charges otherwise payable by UCF under such contract the full amount of such commission, percentage, brokerage, or contingent fee, and to pursue any other remedy available to UCF under such contract, at law or in equity.

Employment of Aliens

Payee's employment of unauthorized aliens, if any, shall be considered a violation of §§274(e) of the Immigration and Nationality Act. If the Payee knowingly employs unauthorized aliens, such violation shall be cause for unilateral cancellation of a contract resulting from this ITN by the University.

Site Rules and Regulations

Respondent shall use its best efforts to assure that its employees and agents, while on UCF's premises, shall comply with the State's and UCF's site rules and regulations, if any.

Travel Expense

Respondent shall not under this ITN or any resulting contract charge UCF for any travel expenses, meals, and lodging without UCF's prior written approval. Upon obtaining UCF's prior written approval, Respondent may be authorized to incur travel expenses payable by UCF to the extent and means provided by Section 112.061, Florida Statutes and applicable UCF policies. Any expenses in excess of the prescribed amounts shall be borne by the Respondent.

Annual Appropriations

The University's performance and obligations under a contract resulting from this ITN are subject to and contingent upon annual appropriations by the Florida Legislature and other funding sources.

Taxes

The State of Florida is a tax-immune sovereign and exempt from the payment of all sales, use and excise taxes. The Respondent shall be responsible to pay any such taxes imposed on taxable activities/services under the contract, if any, resulting from this ITN.

Contractual Precedence

The contract that results from this ITN, if any, and any attachments and/or addenda that are executed by University's duly authorized signatory constitutes the entire and exclusive agreement between the parties. Attachments and/or addenda may include, but are not limited to UCF's Invitation To Negotiate ("ITN") including all the University's ITN specifications, and the Payee's ITN response. In the event of any conflict or inconsistency between before mentioned documents, the order of precedence is:

A. The Agreement/Contract;
B. University's ITN and ITN specifications;
C. Respondent's ITN response; and
D. Any other attached documents signed by the University's official signatory at the time the Agreement/Contract is executed.

Use of Contract by Other Governmental Agencies

At the option of the Vendor/Contractor, the use of the contract resulting from this solicitation may be extended to other governmental agencies, including the State of Florida, its agencies, political subdivisions, counties, and cities. Each governmental agency allowed by the vendor/contractor to use this contract shall do so independent of any other governmental entity. Each agency shall be responsible for its own purchases and shall be liable only for goods or services ordered, received and accepted. No agency receives any liability by virtue of this offer and subsequent contract award.

Public Entity Crimes

A person or affiliate who has been placed on Florida's convicted vendor list following a conviction for a public entity crime may not submit an offer on a contract to provide any goods or services to a public entity, may not submit an offer on a contract with a public entity for the construction or repair of a public building or public work, may not submit offers on leases of real property to a public entity, may not be awarded, or perform work as a contractor, supplier, subcontractor, or consultant under, a contract with any public entity, and may not transact business with any public entity in excess of the offer limit for that public entity, for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

Work For Hire

Any work specifically created for the University under a contract resulting from this ITN by the Payee or anyone working on behalf of the Payee (the term Payee shall encompass both) shall be considered a "work

for hire." All designs, prints, paintings, artwork, sketches, etchings, drawings, writings, photographs, or any other work or material or property produced, developed or fabricated and any other property created hereunder, including all material incorporated therein and all preliminary or other copies thereof, (the "Materials") shall become and remain the property of the University, and, unless otherwise specifically set forth herein, shall be considered specially ordered for the University as a "work made for hire," or, if for any reason held not to be a "work for hire," the Payee who created, produced, developed or fabricated the Materials hereunder assigns all of his/her right, title and interest in the Materials to the University.

The University shall own all right, title and interest in the Materials. The Payee agrees upon request to execute any documents necessary to perfect the transfer of such title to the University. The Materials shall be to the University's satisfaction and are subject to the University's approval. The Payee bears all risk of loss or damage to the Materials until the University has accepted delivery of the Materials. The University shall be entitled to return, at the Payee's expense, any Materials which the University deems to be unsatisfactory. On or before completion of the Payee's services hereunder, the Payee must furnish the University with valid and adequate releases necessary for the unrestricted use of the Materials for advertising or trade purposes, including model and property releases relating to the Materials and releases from any persons whose names, voices or likenesses are incorporated or used in the Materials.

The Payee hereby represents and warrants that, (a) all applicable laws, rules and regulations have been complied with, (b) the Payee is free and has full right to enter into this P.O. and perform all of its obligations hereunder, (c) the Materials may be used or reproduced for advertising or trade purposes or any commercial purposes without violating any laws or the rights of any third parties and (d) no third party has any rights in, to, or arising out of, or in connection with the Materials, including without limitation any claims for fees, royalties or other payments.

The Payee agrees to indemnify and hold harmless the University and those acting for or on its behalf, the UCF Board of Trustees, the State of Florida and the Florida Board of Governors and their respective officers, agents, employees and servants from and against any and all losses, claims, damages, expenses or liabilities of any kind, including court costs and attorneys' fees, resulting from or in any way, directly or indirectly, connected with (a) the performance or non-performance of the University's order by the Payee, (b) the use or reproduction in any manner, whatsoever, or (c) any breach or alleged breach of any of the Payee's contracts or representations and warranties herein.

Export Control:

The parties shall comply with all applicable U.S. export control laws and regulations, including but not limited to the International Traffic in Arms Regulations (ITAR), 22 CFR Parts 120 through 130, the Export Administration Regulations (EAR), 15 CFR Parts 730 through 799 and/or other restrictions imposed by the Treasury Department's Office of Foreign Asset Controls (OFAC), in the performance of a contract resulting from this ITN. The parties agree that no technology, related data or information will be exchanged or disseminated under such a contract nor any collaboration conducted pursuant to such a contract, which are export controlled pursuant to the export control laws of the United States, including the EAR and the ITAR and any other applicable regulations.

The Parties agree that the Payee will not provide the University with any ITAR or EAR restricted technology and/or related data, and that any ITAR or EAR restricted technologies and/or data produced in furtherance of a contract resulting from this ITN will be in the exclusive possession of the Payee and at no time will any export controlled technologies, related data, or information be intentionally or

inadvertently transferred to the University, its facilities, labs, staff, researchers, employees, officers, agents, servants or students in the performance of such a contract.

If the Payee wishes to disclose export controlled technology or technical data to the University, the Payee will, prior to disclosing any information, technical data or source code that is subject to export controls under federal law, notify the University in writing that the material is export controlled and shall identify the controls that apply. The University shall have the right to decline or limit (a) the receipt of such information, and (b) any task requiring receipt of such information. In the event the Payee sends any such technical data or product that is subject to export control, without notice of the applicability of such export control, the University has the right to immediately terminate a contract resulting from this ITN. The Payee understands and agrees that to the extent the Payee's personnel have access to work or materials subject to U.S. export controls while on University property, such personnel will meet all federal export control regulatory requirements or have the appropriate U. S. government approval.

Nonnegotiable Conditions and Requirements

The University seeks to award a contract from this ITN that complies with applicable law and will be both fair and reasonable to all parties, protecting the best interest of the University, its Board of Trustees, faculty, staff and students. With that goal in mind, we have developed a list of terms and conditions that are either required by law and are thus non-negotiable or have been deemed to be important to the University's interests and are thus non-negotiable. Any discussions seeking to alter or remove such a term or condition from any contract resulting from this ITN shall not be granted to any Respondent. The non-negotiable terms and conditions are listed on Appendix II of this document, and identified with **non-negotiable**. Respondents that disagree with any of those "non-negotiable" terms and conditions should forego submitting an offer because said offer shall be rejected as nonresponsive to this ITN. Failure to submit Appendix II with the offer constitutes grounds for rejection of the offer and UCF shall have the right to reject said offer, at UCF's sole discretion.

REQUIRED OFFER FORMAT

3.1 Introduction

The Respondent shall not alter the ITN in any way and shall not reproduce all or any part of the ITN in its offer document. The contract, if any, resulting from this ITN shall attach the entire ITN and incorporate the ITN by reference.

To facilitate analysis of its offer, the Respondent must prepare its offer in accordance with the instructions outlined in this section. If Respondent's offer deviates from these instructions, such offer may, at UCF's sole discretion, be REJECTED.

UCF EMPHASIZES THAT THE RESPONDENT CONCENTRATE ON ACCURACY, COMPLETENESS, AND CLARITY OF CONTENT. The Respondent must use sections and tabs that are clearly identified and also must number and label all parts, pages, figures, and tables in its negotiation. Additional tabs may be appended which contain any other pertinent matters that the Respondent wishes UCF to take into consideration in reviewing the offer. Respondent's response to this ITN must be sent to UCF's Authorized Representative at the address listed in Section 2.1 above.

2 Respondent/Offer Submittal Sections

The Respondent shall organize its offer into the following major sections.

. Experience And Qualifications PeopleSoft applications

Campus Solutions, Human Capital Management, Financials, CRM, Interaction Hub, Mobile, Database Administration, Systems Administration.

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

VB Consulting

Company Background – VB Consulting

Company Background	
Legal Name	VB Consulting Inc.
Location of Head Office	Atlanta, GA
Ownership Structure	Corporation
Number of Employees	20
Certifications	Minority and Women Owned Business Georgia, Florida, Chicago and Texas
Phone numbers & Web Address;	401 Westpark Court Suite 200 Peachtree City, GA 30269 www.vbconsulting.net Contacts: Valaurie Lee President /CEO 770-302-1707 ext 1004 val@vbconsultingservices.com Shawn Howard COO 770-302-1707 shawn@vbconsultingservices.com

VB Consulting, headquartered in Atlanta, Georgia and established in 2002, is synonymous with Transfer Credit and Academic Advisement and Degree Audits in the PeopleSoft Higher Education arena. Since inception, our client experiences range from Canada to California, where we have assisted with implementing Oracle Higher Education Suites. Our consultants have years of experience working with public, private, higher education, and local, state, and federal government agencies. VB Consultants embody professional attitudes and provide a personal touch to ensure quantifiable results. Understanding from experience that Degree Audits cannot work effectively if transfer credits are not articulated properly, VB Consulting has expanded from implementing Academic Advisement and Student Records Campus solutions to supporting implementations for other Degree Audit systems, including DegreeWorks (Banner Product) and DARs/DARwin (now u.select, u.achieve, u.direct- College Source) as well as providing staff augmentation services. VB Consulting has worked with the Campus Solutions product since version 7.0 and watched the product mature through v 7.5, 7.6, 8.0, 8.9 and now 9.0, successfully defining requirements and client needs through inception, full execution, and closure while delivering all projects on time and within agreed budgets.

VB Consulting has expanded services offered from Campus Solutions to partnering with other companies like Active Consulting, Ataway, Highstreet, PRJ Consulting and HTS Global to provide staff augmentation services as well.

PRJ Consulting

Company Background – PRJ Consulting, Inc.

Company Background	
Legal Name	PRJ Consulting, Inc.
Location of Head Office	25379 Wayne Mills Rd., #215 Valencia, CA 91355
Incorporation PRJ – 2007	California (Minority-owned Business)
Ownership Structure	Corporation
Number of Employees	75
Phone number & Web address	Patrick Murray President/CEO patrick.murray@prjconsulting.com 877-966-9411; www.prjconsulting.com

PRJ Consulting was founded on the premise that many organizations have a need for consulting services that are driven by their specific organizational goals and provided by consultants that functionally understand industry best practices and how these best practices can be implemented to help organizations succeed. PRJ Consulting was built, and has flourished, around the concept that clients should be provided with certain service level guarantees to mitigate the risks of not meeting pre- determined operational and ROI goals. At PRJ Consulting, they put the client first and believe organizations should expect more from their consultants.

PRJ Consulting helps organizations achieve their objectives by providing business process redesign and Information Technology consulting services designed to help the clients succeed. Their goal is to establish a long-term relationship with clients by offering products and services that help them achieve and surpass their operational objectives and succeed in today's hyper-competitive environment.

PRJ has significant experience implementing Oracle/PeopleSoft Campus Solutions, Oracle/PeopleSoft HCM, Oracle /PeopleSoft Financials and ERP Portal applications. They have implemented Oracle/PeopleSoft in over 200+ projects; over 100 of which were Oracle/PeopleSoft projects for Public Sector clients. They understand the challenges of complex, large-scale ERP implementations and upgrades. Included below is included a representative cross-industry list of Oracle/PeopleSoft clients.

Ataway , PTE, Ltd.

Company Background – Ataway, PTE, Ltd.

Company Background	
Legal Name	Ataway, PTE, Ltd.
Location of Head Office	Paris, France
Incorporation Ataway – 2001 Incorporation of Holding Company Ataway, PTE, Ltd – 2008	Paris, France Singapore
Ownership Structure	Corporation
Number of Employees	298
Phone numbers & Web Address; Contacts and Street Address for New York Office	60 Madison Avenue New York, New York 10011 www.Ataway.com Tina Travis – Global Director (Fishers, IN) 219-629-3286 ttravis@ataway.com Patrick Mathews – Business Manager 646-352-1844 pmathews@ataway.com

Founded in 2000, Ataway is a global consulting company specializing in process and systems projects for large multinational companies. They are a dynamic and agile firm, focused on delivering quality to customers wherever they are located, with highly skilled global teams located in 13 business hubs of the world. The teams have been involved in projects in 35+ countries providing:

- *Processes: Business Process Reengineering, Business Transformation, Shared Services, Business Intelligence, Change Management, Finance, SCM, HR, Campus Solutions, Lean Six Sigma, Project Management and others.*
- *Systems: PeopleSoft, Fusion, E-Business Suite, BI Tools, Cloud Computing, BPM/SOA, SAP and others.*

The combination of strong expertise, start-up mentality and global presence makes them unique in the industry – resulting in many quality project deliveries and our current robust growth.

Ataway has an existing relationship with UCF - Frederic Portal from the France office is presenting with the UCF Finance team at the Reconnect conference this year - Below is the presentation title:

At Ataway, they are guided every day by this mission statement: "Support our customers and people to excel by any means." Our mission statement is our way of life, and it means we are delivering operational excellence in every corner of our business, meeting or exceeding our commitments to the many constituencies we serve. At Ataway, they believe that success derives from a deep understanding of the clients. They are committed to delivering exceptional services and value, leveraging individual and collective knowledge to support customers. Ataway's teams have a thorough understanding of the systems involved in your organizations. They have extensive experience in implementing these systems in any functionality, business process or location where you operate.

PRJ & Ataway Client List	
University of California – Berkeley	*HealthNet*
LA County USC Medical Center	*Kaiser*
St. Bernardino Medical Center	*Saint Francis Memorial Hospital*
Sequoia Hospital	*Catholic Healthcare West (32 hospitals)*
O'Conner Hospital	*St. Joseph's Medical Center*
Fedex Corporate/Office	*State of Indiana*
Lehman Brothers	*PETCO*
Hilton Hotels (US & Intl)	*Alaska Airlines/Horizon Air*
Carl Karcher Enterprises	*Pixar Inc.*
County of Los Angeles	*County of Ventura*
County of Riverside	*County of Placer*
Pepperdine University	*San Francisco University*
CSU Northridge	*Long Beach City College*
New Jersey City College	*Chico State*
Vanguard University	*Walla Walla University*
Anderson University	*Sacramento State University*
University of Maryland	*Grant MacEwan University*
CSU Channel Islands	*CSU Chancellor's Office*
CSU Dominguez Hills	*San Diego State University*
Business Objects	*Perot Systems*
Northrup Grumman	*Bloomsburg University of Pennsylvania*

PRJ PeopleSoft Experience

PRJ Overall Functional and Technical PeopleSoft Experience	Total Years
Performance Management – ePerformance	7
Health & Safety	7
Compensation – Variable Comp, Salary Planning, eCompensation.	9+
HR Applications (all) including all e products	12+
Web / Self-Service Applications Human Resources, Finance , Higher	10+
Base Benefits	12+
Benefit Administration	12+
Payroll (global)	12+

Overall Technical PeopleSoft Experience	Total Years
Custom Development (Bolt-on applications)	13+
SQR (and SQL)	13+
PeopleCode	13+
System Upgrades/ Fixes	13+
Application Engine	10+
Workflow	10+
Security	9+
Web environment/Self service Development	10

VBC Client List

School	Contract	Converted from
Coast Community College	DegreeWorks Implementation	Manual
Hunter College	Degree Works Implementation	Manual
Grand Rapids Community College	DegreeWorks Consulting	PeopleSoft Academic Advisement
University of Central Florida-Graduate Studies	Transfer credit and Academic Advisement Implementation Post Production Support	DARS
University of Pugetsound	Academic Advisement implementation	Legacy Homegrown System
City Colleges of Chicago	AA Implementation and post production support	Manual
St.Petersburg College	AA Implementation and Post Production support	Legacy
Stanford University	AA Implementation and Post Production support	Legacy
Grant MacEwan- Edmonton Canada	AA Implementation	Legacy
Walla Walla	AA Implementation	DegreeWorks
Kutztown University	AA Implementation	Legacy
Syracuse University	AA Implementation (Phased approach- Graduate School only)	Manual
University of Mass-Amherst	AA Implementation &	DARS

School	Contract	Converted from
	Transfer credit (AA report	
Indiana University	AA Upgrade	DARS
Stanford University	AA Configuration & Readiness assessment and communication plan for AA release	Manual
NC State University	AA Fit/Gap Sessions	Homegrown system
Westwood Colleges	AA and Student Records Consultant	Homegrown
Umass- Dartmouth, Lowell, Boston	Initial AA and SR implementation	Legacy Boston remained with DARS while other schools converted to PS- AA
Northern Arizona University	AA Implementation/ End User Training	Manual
Northwestern University	AA Implementation	Manual
University of Louisville	AA Implementation/End User Training	DARS
Salem State University	AA Implementation	Manual
University of California- Santa Cruz	AA Implementation	Manual
University of St. Thomas	AA Implementation	Manual
Fox Valley Community College	SR/AA Implementation/ End User Training	Manual
North central Technical College	SR/AA Implementation/ End User Training	Manual
Northeast Wisconsin Technical College	SR/AA Implementation/ End User Training	Manual
Frederick Community College	AA Implementation/ End User Training	Manual
Nicolet College	SR/AA Implementation/ End User Training	Manual
Butler University	AA Consulting	N/A
Simon Fraser University	AA Implementation Support	Manual
Los Rios Community College	AA Implementation	Manual
Texas Christian University	SR/AA Upgrade Support	N/A
Grand Rapids Community College	AA Implementation	Manual
University of Florida Gainesville	AA Fit/Gap Analysis	Legacy
LDS Business College	AA Rapid Implementation	Manual
Catholic University of America	AA Implementation	Legacy
Mira Costa Comm College	AA Workshop	Manual
Illinois Community College	AA Workshop	Manual
Benedictine University	AA Pre- and Post-Implementation Support	Legacy
Metropolitan Community College	AA Workshop	Legacy
University of Texas San Antonio Health Services Center	AA Workshop	Legacy
Clarion University	AA Post Production Support	Manual
Bloomsburg	AA Post Production Support	Manual
University of Michigan	AA Consulting	DARS

School	Contract	Converted from
Hobert and William Smith Colleges	AA Consulting	Manual
University of Albany- New York	Advisement workshop comparing pros and cons of DARS vs. Academic Advisement	DARS
The Ohio State University	Advisement workshop comparing pros and cons of DARS vs. Academic Advisement	DARS

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

Client 1

Company Name:	University of Central Florida
City:	Orlando, Florida
Contact Name:	Dr. Teresa Dorman
Contact Phone Number:	407-823-5167
Contact Email:	teresa.dorman@ucf.edu
Mailing Address:	College of Sciences, University of Central Florida 12716 Pegasus Drive Orlando, Florida 32816-1997
Scope of Work: **(More detail, see above)**	• Converting from DARS degree audit to PeopleSoft Academic Advisement • Converting transfer credit rules from DARS to PeopleSoft • Manually converting student exceptions
Length of Service	Almost one year

Client 2

Company Name:	University of Central Florida- Grad Studies
City:	Orlando, Florida
Contact Name:	Tracy Jones
Contact Email:	tracy.jones@ucf.edu
Contact Phone Number:	407-823-5815
Mailing Address:	Millican Hall, 230 4000 Central Florida Blvd.

	Orlando, FL 32816 • Converted from DARS degree audit to PeopleSoft Academic Advisement • Testing Degree audits and transfer credit • Manually converting student exceptions
Length of Service	3 years

Client 3

Company Name:	University of Louisville (reoccurring projects)
City:	Louisville, Kentucky
Contact Name:	Lamar Braggs
Contact Phone Number:	502-462-5662
Contact Email:	Lamar.braggs@louisville.edu
Mailing Address:	4505 S. Maryland Pkwy. Louisville, KY 402
Scope of Work: **(More detail, see above)**	• Upgrade from 8.0 to 8.9 to 9.0 • Academic Advisement Implementation and audit • Graduation Tracking
Length of service	10 years

PRJ & Ataway References

Company Name:	County of Ventura
Industry	Public Sector
Agreement Description (Scope of Services Provided)	Over the past 6+ years, PRJ Consulting/Ataway have been responsible for the maintenance of the Counties HCM system. PRJ/Ataway has been involved with implementation, upgrades, post production, position management configuration, self-service enhancements, interfaces, reports, project management, training, knowledge transfer, benefits configuration, various bolt-ons to increase efficiency, workers compensation, total compensation related projects, ePerformance, Profile Management, load testing, tuning, etc.
Business Processes Implemented	Multiple HCM business processes implemented in HR, Benefits, Payroll, Time and Labor, ePerformance, Self Service and Training.
Version of Proposed Solution Implemented	PeopleSoft HCM 9.1
Project Start Date	5/20/2007
Project completion Date (if in progress, state expected Completion Date)	HCM Upgrade completed in 2011, current projects going on are tuning projects, post production stabilization, ePerformance, Public Works Labor Costing projects.

Contract Term	Multiple contracts over the past 6+ years. Maintenance contracts are still valid, as well as contracts for IT support, ePerformance implementation and Public Works costing processes.
Contact Name and Title	Louise Webster – Deputy Auditor-Controller
Contact Telephone Number	(805) 654-3194
Contact Address	800 S. Victoria Ave Ventura, Calif.
Contact E-mail	Louise.webster@ventura.org

Company Name:	FedEx
Industry	Private Sector
Scope of Services Provided	Over the past 7+ years, PRJ Consulting has been responsible for the maintenance and training for all finance systems (PeopleSoft, Kofax, Internal custom) system. PRJ has been involved with implementation, upgrades, post production, configuration, self-service enhancements, interfaces, reports, project management, training, knowledge transfer, benefits configuration, various bolt-ons to increase efficiency, workers compensation, total compensation related projects, PRJ has owned all Finance training development and execution.
Business Processes Implemented	Multiple financial business processes implemented
Version of Proposed Solution Implemented	PeopleSoft Financials 8.9, 9.1
Project Start Date	5/20/2006
Project completion Date (if in progress, state expected Completion Date)	Current working to centralize all division and companies into one common database
Contract Term	Multiple contracts over the past 7+ years. Maintenance contracts are still valid, as well as contracts for IT support, performance implementation
Contact Name and Title	Robert Morrison Finance Manager FedEx Financial Systems Support

Contact Telephone Number	(901)-757-3151
Contact Address	1790 Kirby Parkway 5th Floor Memphis, Tennessee
Contact E-mail	rmorrison@fedex.com

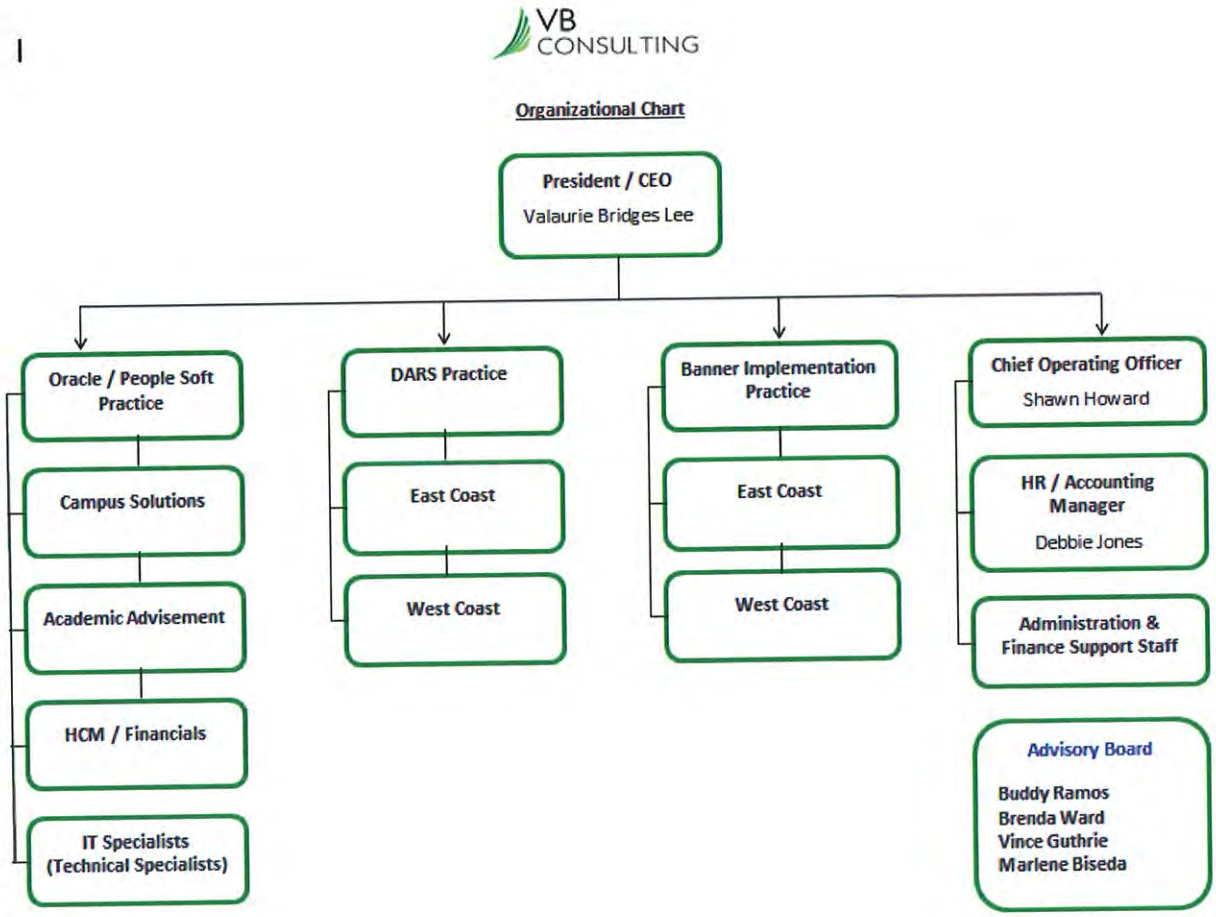
Company Name	State of Indiana
Industry	Public Sector
Scope of Services Provided	Trained all State agencies (3000+) for PeopleSoft Finance applications Supported go live implementation and post production configuration, rollout and troubleshooting.
Business Processes Implemented	All Finance applications
Version of Proposed Solution Implemented	PeopleSoft 8.9
Project Start Date	2007
Project completion Date (if in progress, state expected Completion Date)	Finished training 2008, support post production work 2009
Contract Term	Multiple contracts.
Contact Name and Title	Kirke Willing, Deputy Auditor
Contact Telephone Number	317-232-3300

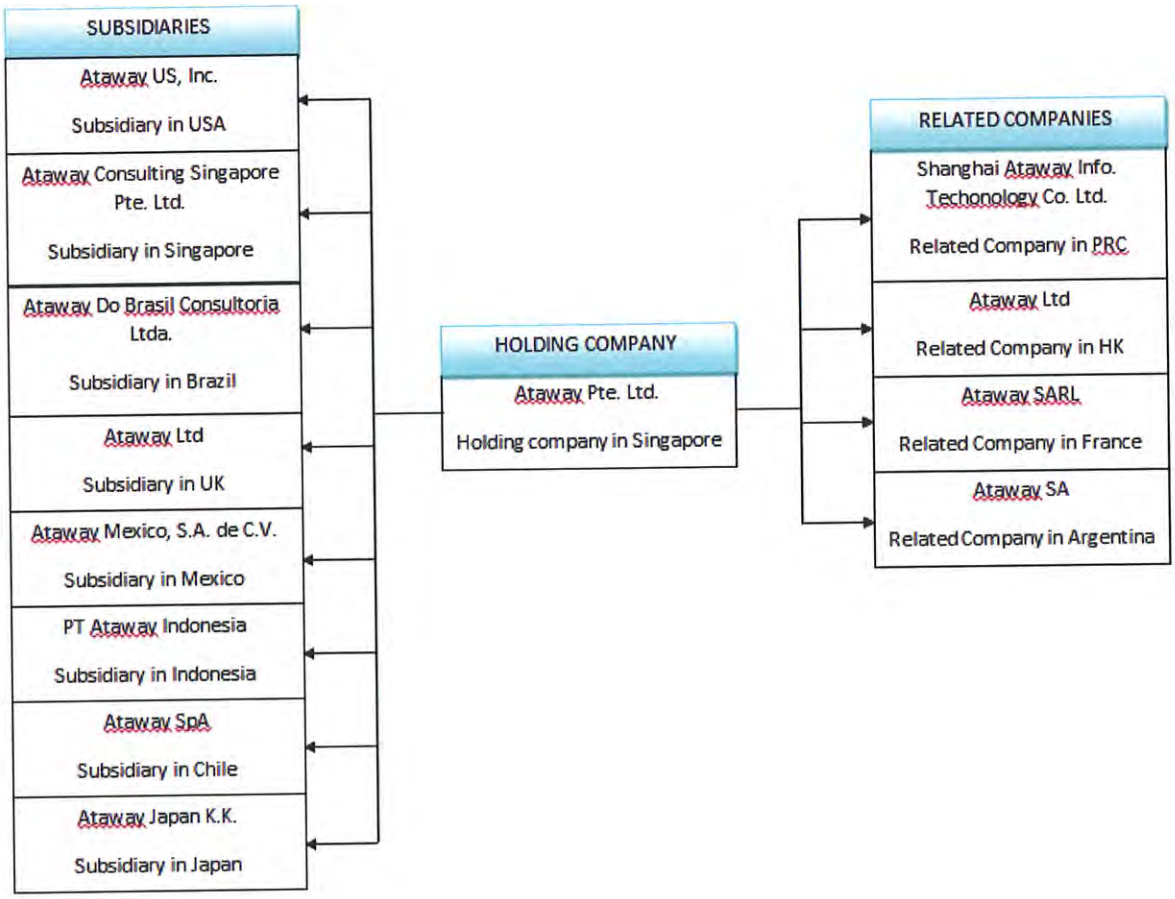
Contact Address	**Office of the Auditor of State of Indiana** 200 West Washington Street Suite 240 Indianapolis, IN 46204

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

   Neither VB Consulting, PRJ nor Ataway, PTE, Ltd., has had an agreement terminated in the last 5 years.

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





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

Collectively VBC, PRJ and Ataway have over 50+ years of experience..

3. Services Offered

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

Each listed employee's project experiences have been end-to-end. They each understand the methodology needed to ensure successful implementations. These employees are also skilled in quickly coming up to speed in the middle of an ongoing project. For resumes please see Appendix V. The resumes of available resources could be the following, but not limited to:

	Name	Job Titles	Experience
1.	*Valaurie Lee*	*Advisement Consultant*	*Over 14 years*
2	*Jessica Owens*	*Advisement Consultant*	*Over 5 years*
3	*Erin Bettis*	*Advisement Consultant*	*Over 5 years*
4	*Steffen Deonanan*	*Advisement Consultant*	*Over 3 years*
5	*Tram-Anh Pham*	*Advisement Consultant*	*Over 2 years*
6	*Tiffany Trass*	*Advisement Consultant*	*Over 6 years*
7	*Sanjeev Chitkara*	*Technical Consultant*	*Over 16 years*
8	*Brahma Mulaka*	*Technical Consultant*	*Over 10 years*

9	Lauren Wass	SR Consultant	Over 10 years
10	Gerald Adams	Technical Consultant	Over 14 years
11	Leigh Hopf	JR Consultant	Over 2 years
12	Tina Travis	SR Consultant	Over 20 years
13	Andreas Henscke	SR Consultant	Over 18 years
14	Altamarie Burroughs	SR Project Manager	Over 20 years
15	Siri Shepek	SR Technical Consultant	Over 14 years

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

VBC, Ataway and PRJ consultants have a range of experience from Junior Level to Senior Level consultants in the private and public sector. The above listing represents our selection of the most senior consultants for this project based on positive feedback from other clients. In the past, we have also collaborated with other consulting companies to staff resources as needed. Collectively, the team has over 50+ years of implementation experience .

This proposal outlines how we will work collaboratively to bring University of Central Florida (UCF) optimal results. We believe our combined experience and capabilities align with UCF's goals and requirements, reduce risk and promote a structure for delivery excellence.

Key points for consideration within our proposal are as follows:

- ***Strong leadership in implementing programs within Higher Education.*** *This combined team has been involved in multiple end to end PeopleSoft ERP Projects at Institutions of varying size and complexity worldwide. Additionally, our team has repeatedly worked together and demonstrated experience in executing and integrating the work required for successful delivery.*
- ***Extensive Oracle/PeopleSoft Experience:*** *VB Consulting Services, PRJ Consulting and Ataway have teams that have been consulting on the PeopleSoft Enterprise for decades and in the case of Campus Solutions, since the initial version of the Product (version 6.0). Additionally, PRJ is an Oracle/PeopleSoft Global Alliance Consulting Partner, Ataway is an Oracle/PeopleSoft Platinum Partner and VBCS is an Oracle Gold Partner and known and trusted provider of talent for the University of Central Florida as well as a company whose integrity and approach resonates and matches shared core values that are relied upon to meet and/or exceed the client's expectations. Our team's quality and value continues to be recognized as a leader in the marketplace locally, nationally, and globally. PRJ, Ataway and VBC have consulting teams of seasoned professionals locally, across the United States and globally who specialize in serving the higher education clients.*
- ***Significant PeopleSoft Version 9.1 and currently starting 9.2 implementations, upgrades and training experience****: Our team's Oracle-PeopleSoft practices are leaders in providing professional services to the Public Enterprise market in the United States and internationally. Specifically, our enterprise systems consulting delivery experience includes version 9.1 projects recently completed or underway in the private / public sector industry:*

  - *Customized training of HCM version 9.1 at Ventura County, CA*
  - *Customized training version 9.1 at Placer County*
  - *Customized training, Finance version 9.1 at FedEx, Worldwide*
  - *Customized training, Web Services for 9.1 and 9.2 at Allegis*
  - *Post-Production Support CSU Dominguez Hills*

- *Upgrade Support CSU Dominguez Hills*
- *Post-Production Support University of Miami*

Another area of expertise VBC, PRJ and Ataway are particularly skilled is also the area of Project Management.

VBC/PRJ/Ataway's Project Management Methodology

VBC/PRJ/Ataway's Worldwide Project Management defines the way in which projects are managed throughout VBC/PRJ/Ataway. Our derived from VBC/PRJ/Ataway project management best practices, including Project Management Method (PMM) and other recognized industry standards, such as the Project Management Institute (PMI) PM Body of Knowledge (PMBoK), the Software Engineering Institute (SEI), and the International Standards Organization (ISO).

Our PM methodology requires that specific project management activities are properly logged, reviewed, and tracked. These include project risks, issues, actions, and change requests. Each item is reviewed with the project management team on a regular basis to determine appropriate steps needed to drive the project to success. To aid in the fast deployment and start-up of the methodology, includes a number of tools (such as issue management and test problem reporting) and templates (including project charters, test scripts).

VBC/PRJ/Ataway has long recognized the importance of strong project management in order to deliver successful projects and our robust project management approach is built upon three pillars:

Provide qualified and experienced project managers: VBC/PRJ/Ataway invests heavily in training our project managers in project management techniques and processes as well as the application of the Vision to Value methodology to provide teams with the leadership required to deliver complex trainings. We have many projects managers who can bring deep expertise in environments similar to yours as well as exceptional skill in implementing the modules in your scope.

Use a proven project management methodology: our proposed approach leverages the lessons learned from our previous engagements and provides our team the ability to "hit the ground running" in achieving your schedule.

Supply a powerful suite of project management tools and templates: our project management tools have proven to work well in a wide variety of environments and will be readily adaptable to your situation.

VBC/PRJ/Ataway's project management methodology provides procedures and tools for managing the schedule, controlling costs, mitigating risk, and limiting "scope expansion" to the project. VBC/PRJ/Ataway's qualified project management professionals are proficient in VBC/PRJ/Ataway's proven methods that are integrated with VBC/PRJ/Ataway's fundamental business processes built on a common tool platform. This provides UCFwith fully scalable project management capabilities that are second to none and with several key project benefits.

VBC/PRJ/Ataway's project management method complements by Implementation Method by:

- *Providing a framework for planning the sequencing and timing of tasks*
- *Allocating resources*
- *Collecting relevant progress and status data*
- *Managing project work plan changes and project-related issues*
- *Producing meaningful project reports*
- *Managing the deliverable review process*
- *Reducing project risks*

UCF will benefit directly from our established techniques and tools for project planning, tracking, reporting, and management. We will leverage our collective experience gained from managing other higher education ERP training, upgrade and integration efforts.

VBC/PRJ/Ataway's framework for assessing, managing, and reporting on the health of a project. Our team provides a structured sensitivity, assessment, and reporting process to all critical project success and failure dimensions. The health checks on each dimension include considerations for root causes of problems, as well as indicators of best practices. Experience has shown that these Seven Keys constitute the critical success factors that apply to all projects, regardless of size. Using this consistent language provides insights for effectively communicating project status to executives in a way that leads to decisions and actions that help achieve project success.

Keys to success:

1. *Stakeholders are Committed: Identifying, evaluating, informing, and influencing the individuals and groups who are affected by or will influence the outcome of the project;*
2. *Business Benefits are being realized: Estimating, measuring, and monitoring the benefits that will be gained from the project. Benefits include expected result and the associated cost, both financial and non-financial, of achieving that result;*
3. *Work and Schedule are Predictable: Controlling the production and acceptance of project services and deliverables and verifying their provision to specified;*
4. *Team is High Performing: Identifying, mobilizing, and developing the people required for the project team. Obtaining and maintaining appropriate space, equipment, and other resources required to successfully complete the project;*
5. *Scope is Realistic and Managed: Agreeing upon, maintaining, and amending the boundaries of the project;*
6. *Risks are being mitigated: Identifying and evaluating risks and issues. Developing avoidance, mitigation, and resolution activities to counteract those risks and issues;*
7. *Delivery Organization Benefits are being realized: Establishing, agreeing upon, and monitoring value added and effective knowledge transfer that VBC/PRJ/Ataway, acting as the delivery organization, brings to the project.*

Monitoring and report on project process

In order to regularly monitor performance versus schedule and the quality of our work, we will use a combination of regular status meetings, periodic stakeholder meetings, satisfaction surveys, and performance metric monitoring (i.e., metrics for quality, budget, and schedule) as appropriate.

The primary objectives of ongoing performance monitoring and reporting are:

- *to enable effective, consistent reporting*
- *to provide information on what has occurred to date, as well as, providing an objective, informed opinion on what is expected to happen in the next reporting period*
- *to provide data to be used in forecasting the schedule and cost remaining to completion; and*
- *to validate that project progress is maintained in order to mitigate issues or risks prior to an event*

Project Update Meetings

Regular status meetings and status reports are necessary to provide adequate communication and to focus on resolving issues and making decisions on a timely basis. These meetings will be the primary method of gathering information that will be used for regular status reports and other summaries and presentations provided to management. The status meetings will also be the vehicle to discussing project-wide and cross-team issues and understanding more of other teams' progress and emerging issues.

Consulting Scope and Cost to University

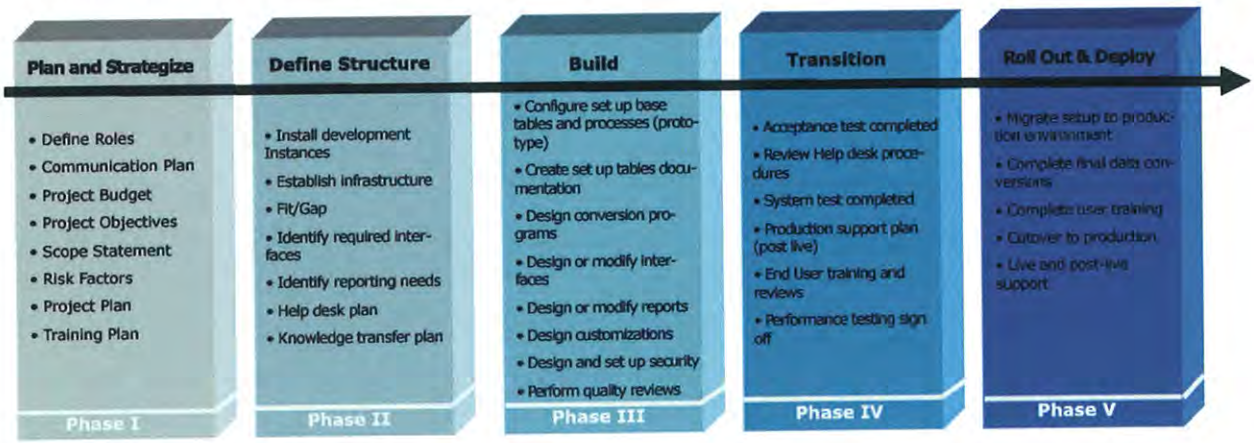
1. Demonstrate an understanding of the services the university requires under this contract.

VB Consulting currently completing its first year (of a two year project) working with the University of Central Florida for converting DARS to PeopleSoft Academic Advisement and Transfer Credit for Undergraduates. Having this experience in addition to spending 2 years converting Graduate Studies from DARS to PeopleSoft, we understand the culture of UCF. Not only do we understand UCF, many of our consultants have worked at UCF and assisted with post- production support as well as worked on other technical post production projects. In regards to other multi-campus institutions, VB Consulting and partners have worked with or in the process of working with the following large, complex, multi-campus Higher Education Institutions:

- *California State- Los Angeles & Bakersfield (Quarter to Semester Project)*
- *City Colleges of Chicago- (Academic Advisement Implementation)*
- *Maricopa Community Colleges*
- *Wisconsin Technical Colleges (Student Records and Academic Advisement implementation)*

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

VB Consulting/PRJ and Ataway will utilize the methodology that has served us well with past clients. The project manager will work with the client to validate and verify deliverable templates prior to submission to ensure the deliverables are acceptable. In addition, we will keep the client intricately engaged and involved with frequent accomplishments via status reporting and regular project updates.



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

	Role	On Site Bill Rate Range	Off Site Bill Rate Range
1.	Junior Consultant	$100-$125	$100-$115
2.	Senior Consultant	$160-$175	$140-$155
3.	Technical Consultant	$160- $175	$140-$155
4.	Project Manager	$125- $175	$105- $155

***Note-Rates are negotiable-

VB Consulting
01-0611284
(FEIN)

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

Travel expenses are accounted for in our rates. They are all inclusive.

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

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

(See technical resumes in Appendix V- Our technical employees and partners all have a variety of experience and are skilled at working as database administrators and working with varying system architectures.)

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

(See technical resumes in Appendix V- Our technical employees and partners all have a variety of experience and are skilled at working as database administrators.)

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

(Also see technical resumes in Appendix V- Brahma Mulaka, Siri Shepek ,Gerald Adams, Sanjeev Chitkara, Vasu Kaava, Robert Carroll, Subbiah Dharmar, and Madan Kumar all have a variety of experience and are skilled at working on PeopleSoft projects integrating with third part applications.)

As an example: Cal State Dominguez Hills Project Goals and Objectives

- *To provide an underlying technical infrastructure that will support robust Web enabled delivery of administrative services and information to all university constituents and that will readily adapt to new innovations in technology.*
- *To provide an integrated suite of administrative applications in which data is entered only once and is consistent and accurate across all applications.*
- *To provide easy to use and understand access to administrative services and information.*
- *To make possible the "anytime, anyplace, anywhere" availability of administrative services and information.*
- *Too successfully implement the project in a manner that controls costs and utilizes campus resources in a responsible manner, values the efforts of individual employees, and allows for participation by all affected constituencies.*

CSUDH Project Scope

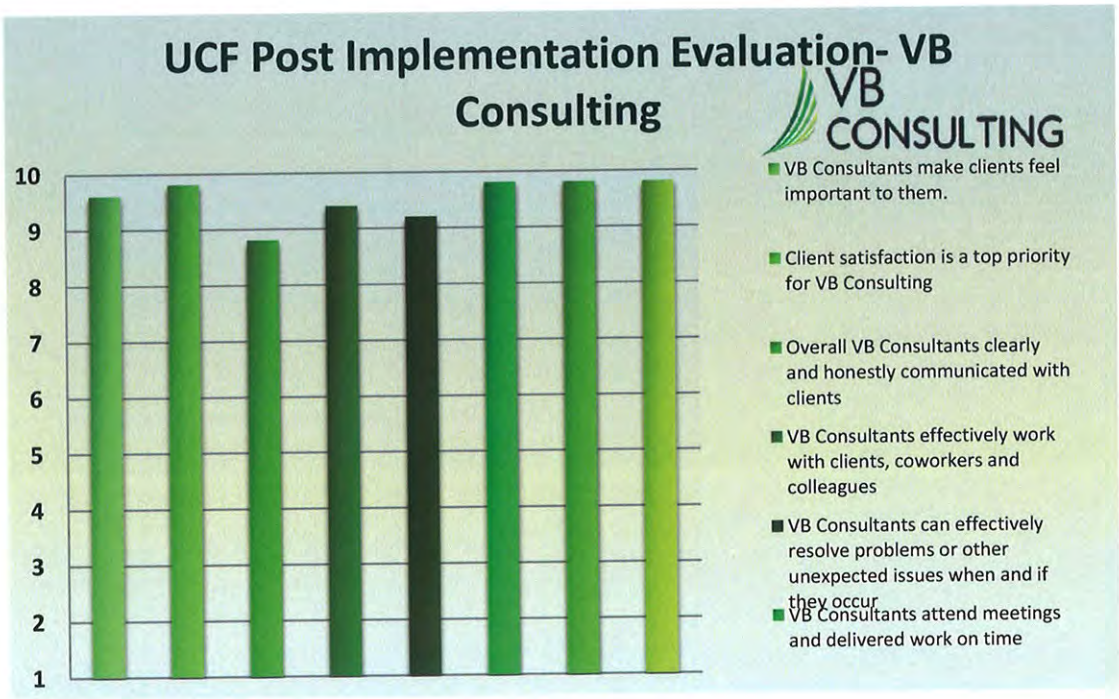
Phase I is defined as the implementation of the CMS baseline modules

Functionality
HRMS – Position Management, Administer Workforce, Monitor Workforce (EEO Reporting), Base Benefits, and Time & Labor functionality *Finance – General Ledger, Purchasing, AP, AR/Billing, Asset Management Modules* *Student – Recruiting, Admissions, Student Records, Financial Aid, Student Financials, Academic Advising, Campus Community*

. Demonstrated Ability to Meet Requested Project Time Lines

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

   VB Consulting's area of expertise is Student Systems and implementing Academic Advisement and Degree Audit systems and Campus Solutions. Please see the following list of schools we have previously or are currently working directly with where we have either delivered before the timeframe and/or within budget. See VBC current clients. Because we have always been on time with delivery, we have had repeat business with almost all of our clients. Please see our survey Post Implementation Evaluation from UCF.



THER REQUIREMENTS

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

PPENDIX I EVALUATION SCORING SHEET

IE OF RESPONDENT COMPANY VB Consulting

TRUCTIONS TO EVALUATION COMMITTEE MEMBER:

Evaluate each offer on a separate form.

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

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

Evaluation Criteria	Max Points	Points Awarded
xperience and Qualifications in any of the following PeopleSoft pplications: Campus Solutions, Human Capital Management, inancials, CRM, Interaction Hub, Mobile, Academic Advising, Oracle atabase Administration, PeopleSoft Systems Administration	100	
ervices Offered	35	
onsulting Scope and Cost to University	10	
rior experience with a large complex multi campus Higher Education nstitution	35	
emonstrated ability to meet the requested project time lines	10	
Conformance to ITN's preferred conditions and requirements ailure to conform to ITN's mandatory conditions and equirements may result in rejection of proposal) section 2.0	10	
l Points:	200	

MMENTS:

ALUATOR'S NAME_____

ALUATOR'S SIGNATURE_____

TE_____

APPENDIX II SUPPLEMENTAL OFFER SHEET TERMS AND CONDITIONS

'he 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 'our offer, at UCF's sole discretion. Respondents shall not check sections as "understood and agreed upon" vith the intent to negotiate a change to those sections/terms and conditions after tentative award of a :ontract resulting from this ITN. Respondents disagreeing with any term or condition of this ITN shall act to esolve the difference prior to the deadline for inquires, as noted in this ITN. A Respondent's disagreement vith any non-negotiable section of this ITN shall be automatically rejected. Failure of the university and the entative awardee to come to an agreement with respect to terms and conditions within a time frame UCF letermines to be reasonable constitutes grounds for rejection of that offer and the University shall have the ight, at its sole discretion, to award the contract to the next favorable respondent.

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

.16	✓		
.17	✓		
.18 **Non-negotiable**	✓		
..19	✓		
:.20 **Non-negotiable**	✓		
:.21	✓		
:.22	✓		
:.23	✓		
:.24	✓		
:.25	✓		
:.26	✓		
:.27**Non-negotiable**	✓		
:.28	✓		
:.29	✓		
:.30**Non-negotiable**	✓		
:.31**Non-negotiable**	✓		
2.32	✓		
2.33	✓		
2.34	✓		
2.35**Non-negotiable**	✓		
2.36	✓		
2.37	✓		
2.38	✓		

.39**Non-negotiable**	✓		VB
.40	✓		VB
.41	✓		VB
.42**Non-negotiable**	✓		VB
.43	✓		VB
.44	✓		VB
.45	✓		VB
.46	✓		VB
.47	✓		VB
.48	✓		VB
.49 **Non-negotiable**	✓		VB
.50	✓		VB
3.0	✓		VB
4.0	✓		VB

RESPONDENT COMPANY NAME VB Consulting

AUTHORIZED SIGNATURE _____

TITLE President / CEO

DATE 5/29/13

VB Consulting certify to the ersity of Central Florida that we do not and will not maintain or provide for our employees any segregated ties at any of our establishments, and that we do not and will not permit our employees to perform their ces, under our control, where segregated facilities are maintained. We understand and agree that a breach is certification is a violation of the Equal Opportunity clause required by Executive order 11246 of 24 ember 1965.

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

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

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

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

SUBPART - CONTRACTOR'S AGREEMENTS

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

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

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.

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.

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.

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.

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.

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.

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

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

ıEC. 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.

ıPONDENT COMPANY NAME VB Consulting

ΓHORIZED SIGNATURE

LE President /CEO

ΓE 5/29/13

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: VB Consulting

Authorized Representative's Name: Valaurie B. Lee

Authorized Representative's Signature: _____

Date: 5/29/13

APPENDIX V-Resumes

VB CONSULTING

Brahma R. Mulaka

SUMMARY OF QUALIFICATIONS

- Over 16 years of professional expertise implementing large enterprise solutions with expertise
- Involved in various product implementations and upgrades at various capacities, as a Senior Technical Consultant, Functional Lead, Team lead and senior techno-Functional consultant.
- Leader of technical processing for implementing Contributor Relations, Student Records, Admissions, Transfer Credit and Recruiting

---

WORK EXPERIENCE

Senior Consultant- (March 2012- Nov 2013)
Florida State University- Tallahassee, FL

- Designed and delivered several key solutions for Student Records and Advisement
- Developed and designed student auto-enrollment system for freshman interest groups

Technical Lead- (Oct 2011- Oct 2012)
Embry Riddle Aeronautical University- Daytona Beach, FL

- Worked with client team in developing data conversion strategy
- Led the conversion team
- Trained several client technical team members on people Tools as well as functional resources on XML publisher, 3C and Communication generation processes.
- Developed several interfaces to automate data exchange with BlackBoard system.
- Designed and developed custom Student records system for GOArmyEd compliance and SOC
- advisement reporting requirements
- Implemented a custom file transfer utility to handle the PeopleSoft Interfaces.
- Developed several interfaces to automate data exchange with BlackBoard system.

Ascension Health, *(Aug 2010- May 2011)*
St.Louis, MO

- Led the implementation of Transfer Credit, Admissions, Student Finance, Financial Aid and Student Records modules
- Provided guidance for change management and PeopleSoft environment architecture
- Loaded 9 million BIODEMO records in less than 18 hours, all data verified by existing PeopleSoft validation checks
- Developed an elaborate conversion application which uses App Engine, People Code and Component Interface to complete conversion needs from Ohio's legacy system and third party systems

Project Technical/Conversion Lead - (April 2007- Oct 2008)
California State University- Sacramento, Azusa, CA

- Configured and implemented Integration Broker messaging process between PeopleSoft CRM and PeopleSoft Campus Solutions
- Utilized Component Interface to complete an Admissions conversion from Azusa's legacy system

Conversion Lead- (Jan 2007- Sept 2007)
Moody Bible Institute, Chicago, IL

- Configured and implemented Integration Broker messaging process between PeopleSoft CRM and PeopleSoft Campus Solutions
- Implemented Admissions, Student Finance and Student Records modules

Technical Developer- (June 2006- Dec 2006)
West Chester University, West Chester, PA

- Modified PeopleSoft Cobol
- Modified several applications in the Student Records module
- Provided unique solutions to overcome difficult programming tasks
- Increase efficiency by tuning Oracle ORACLE SQL statements

Technical Developer- (Oct 2005- June 2006)
University of Maryland University College, College Park, MD

- Provided programming expertise for significant projects in PeopleSoft Financials modules
- Re-wrote interfaces to state of Maryland and simplified user interface
- Developed reports for Financials extracted from employee data

Technical Developer- (May 2005- Oct 2005)
West Chester University, West Chester, PA

- Provided programming experience for Student Financials module
- Developed reports via SQR
- Tuned Oracle ORACLE SQL statements
- Assisted DBAs in configuring, implementing and testing interfaces for financial system

Technical Lead/Contributor Relations- (Oct 2003- May 2005)
Boise State- Boise, ID

- Led implementation and maintenance of the PeopleSoft Contributor Relations Module
- Led a team of developers in the design, coding and unit testing of PeopleCode, SQR applications, and Oracle ORACLE SQL Scripts
- Ensured existing standards were met during conversion and configuration

PEOPLESOFT TECHNICAL EXPERIENCE		
PeopleTools	SQR	Excel to CI
Component Interface	Web Services	PS Query
(BI) XML Publisher	Crystal Reports	nVision
Data Mover	Row Level Security and Object Secuity	COBOL (PeopleSoft)
Application Engine	PeopleCode	Connected Queries
PEOPLESOFT PRODUCT EXPERIENCE		
Student Records	Transfer Credit	Academic Advisement
Admissions	Financial Aid	Student Financials
Campus Community	Crystal Reports	nVision
Data Mover	Row Level Object Security	COBOL (PeopleSoft)
Application Engine	PeopleCode	Connected Queries

VB
CONSULTING

Gerald Adams

SUMMARY OF QUALIFICATIONS

- 13+ years of PeopleSoft experience upgrading and support in Higher Ed Sector
- Excellent troubleshooting and functional support abilities
- Experienced in PeopleSoft Campus Solutions application
- Understands the integration between the modules
- Excellent knowledge of database tables within each module

WORK EXPERIENCE

Technical Lead Consultant- (July 2010 - Present)

Florida A&M University- Tallahassee, Florida

- Developed a custom comprehensive solution to assess the State of Florida Excess Credit Hours charge, indicate courses which are exempt from the Excess Credit Hours Charge, provide student on-line Appeal process for Excess Credit Hours and to provide information regarding student's progression towards the Excess Credit Hours Charge
- Developed a custom comprehensive solution to assess the State of Florida Repeat Surcharge charge and provide student on-line Appeal process for Repeat Surcharge.
- Developed a custom comprehensive solution to assess the State of Florida Differential Fee charge.
- Developed and integrated a front end custom process to request Official Transcripts on-line without being logged into PeopleSoft.
- Developed and integrated the delivered Student Billing process and created a custom XML Bill/Invoice.
- Developed and integrated a custom on-line Anti-Hazing Acknowledgement process to have students acknowledge with on-line signature that they will engage in any hazing activities.
- Developed and integrated a custom On-line process that allows all students to Apply for Graduation and checking all criteria required to allow them to be eligible for Graduation
- Developed and integrated a custom On-line process that allows certain faculty, Deans and Registrar to approve and deny students who apply for Graduation.
- Developed a custom process to assess CLAST Milestones.
- Developed a custom process to assess Foreign Language Milestones.
- Developed a custom process to assess CPREP Milestones.
- Developed a custom process to assess Gordon Rule Milestones.
- Developed a customer process for Academic Restructuring of Program and Plans.
- Enhanced the Third Party billing process.
- Developed an Admissions process for High School Grade Recalculation.
- Developed a custom process for NSCL Clearinghouse data/file.

Technical Lead Consultant Academic Structure Reorganization Project – (May 2009 - July 2010)

Florida International University - Miami, Florida

- Responsible for finding all hardcode SQR**, COBOLs, PeopleCode, SQLs, Queries, etc**
- Responsible for the creation of the **SQR** Conversion programs and testing of the programs to convert all ACAD_PROG, ACAD_PLAN or ACAD_SUB_PLAN values across the PeopleSoft Tables and Objects in all the Campus Solutions modules to their new values.

Technical Consultant (Sept 2008-April 2009)

SA 8.0 to Campus Solutions 9.0 upgrade **for Florida A&M University -**Tallahassee, Florida

- Responsible for re-application, testing and user training of delivered processes and customizations for SA8 to Campus Solutions 9.0 and **DB2** to **Oracle** upgrade.
- Responsible for changing **SQRs, App Engines** and **PeopleCode** to accommodate the Oracle date format from the DB2 format and changes due to upgrade to CS9
- Converted custom **self-service** applications in SA8 into the Student Center format in Campus Solutions 9.0, utilizing the CS9.0 page/data structures.
- Helped troubleshoot **Admissions, Financial Aid, Student Records** and **Student Financials** issues during the upgrade and applied changes to resolve them.

Technical Consultant (April 2007-Sept 2008)

SA 8.0 to Campus Solutions 9.0 upgrade **for Cornell Univeristy-** Ithaca, NY

- Responsible for creating App Engine/Component Interface programs for **FINANCIAL AID** conversion.
- Responsible for facilitating Functional requirements gathering, creating Functional and Technical specs and for the creation of the following complex customizations and/or bolt-ons for **FINANCIAL AID** area utilizing **COBOL, PEOPLECODE, APP ENGINE, COMPONENT INTERFACE** and **SQR**:
- Responsible for changing **SQRs, App Engines** and **PeopleCode** to accommodate the Oracle date format from the DB2 format and changes due to upgrade to CS9
- Additional duties include assisting other areas of Campus Solutions with queries, troubleshooting and creating scripts to delete obsolete Financial Aid Setup data.

Technical Consultant (August 2006-November 2006)

SA 8.0 to Campus Solutions 8.9 implementation **for University of Florida-** Gainesville, FL

- Responsible for facilitating Fit-Gap sessions for **CAMPUS COMMUNITY** and creating Functional and Technical specs and the SQR conversion programs for conversion from Legacy system to Campus Solutions 8.9.
- Responsible for converting Setup data from the **Student Admin 8** system to the **Campus Solutions 8.9** system for **ACADEMIC STRUCTURE** and **CAMPUS COMMUNITY**.
- Provided analysis and table information for all of the **STUDENT RECORDS** tables for loading/interfacing to Campus Solutions 8.9. Additional duties include participating in the Fit-Gap sessions for **STUDENT FINANCIALS**

Technical Consultant (December 2003 August 2006)

SA 8.9 **for Florida A&M University-** Tallahassee, FL

- Responsible for the creation of Data Mapping and **SQRs** for conversion for **STUDENT FINANCIALS, STUDENT RECORDS** and **ADMISSIONS**, which includes but are not limited to **SCHEDULE OF CLASSES, FACILITIES, THIRD PARTY CONTRACTS, IMMUNIZATIONS, HIGH SCHOOL GRADES** as well as other areas.
- Responsible for developing **COBOL, PAGE, HTML PAGE, PEOPLECODE, SQR and APP ENGINE/COMPONENT INTEFACE** customizations/enhancements to **STUDENT FINANCIALS, STUDENT RECORDS, STUDENT SELF-SERVICE, ENROLLMENT and ADMISSIONS** to accommodate the **STATE of FLORIDA** rules/regulations and for the unique way the University performs its day to day functions.
- Created several bolt-on and customized applications for **STUDENT FINANCIALS, STUDENT RECORDS/ENROLLMENT** and **ADMISSIONS**.
- Provided **training** for certain areas of **STUDENT FINANCIALS, STUDENT RECORDS** and **ADMISSIONS** for delivered and custom applications. Additional duties will include assisting with the initial/required SETUP of **CAMPUS SOLUTIONS 8.9**

Technical Consultant (Feb 2000-December 2003)

SA 8.0 **for St.Petersburg College** - St. Petersburg, FL

- Created a process to **automate** the creation of SQRs for conversion, which saved thousands of man-hours on the conversion effort.
- Developed **several *state of the art* PAGE, PEOPLECODE, SQR, AE and COBOL** customizations/enhancements to **STUDENT FINANCIALS, STUDENT RECORDS, ENROLLMENT and CAMPUS COMMUNITY 3Cs** to accommodate the **STATE of FLORIDA** rules/regulations and for the unique way the college performs its day to day functions.

- Created customizations to correct some of the flaws in PeopleSoft for **STUDENT RECORDS, ENROLLMENT, STUDENT FINANCIALS** and **CAMPUS COMMUNITY 3Cs**.
- **Functional Lead** for **CAMPUS COMMUNITY 3Cs** and **co-functional lead** for **STUDENT FINANCIALS.**

EDUCATION

The Ohio State University, Columbus, OH
Bachelor of Science: Business Administration/Management Information Systems, June, 1985

LANGUAGES

PEOPLECODE, ORACLE SQL, SQR, ORACLE PL/SQL, DB2/SQL, INFORMIX/SQL, SQL SERVER, CICS, COBOL, COBOL II, ADS/O, IDEAL, IMS/DL1, PL1, ASSEMBLER, OS/JCL, FORTRAN, SCRIPT/VS, QBASIC

SOFTWARE

PEOPLETOOLS, PROCESS SCHEDULER, QUERY, CRYSTAL REPORTS, APP ENGINE, EQUATION ENGINE, COMPONENT INTERFACE, XML PUBLISHER, ORACLE SQLPLUS, SQL DEVELOPER, INFORMIX, DB2, QUEST, SQR RUNNER, AA-DCS, IMS, DATACOM/DB, SUPRA, ROSCOE, TSO/ISPF, Microfocus COBOL WORKBENCH (COBOL II, CICS), XDB, LIBRARIAN, VSAM, SDF, SDF2, CEDF, INTERTEST, SPUFI, EXPEDITOR, DATA-EXPERT, PALLM VECTOR, PANVALET, FILEAID, IDMS/R, QUICKJOB, GROUP1(CODE1+, CUE

PEOPLESOFT APPLICATIONS

CAMPUS SOLUTIONS /STUDENT ADMINISTRATION (Conversion, Admissions, Student Financials, Campus Community, Student Records/ Enrollment, Financial Aid, Academic Advising) 8.0 – 9.0
FINANCIALS (Asset Management, Purchasing, Accounts Payable, General Ledger)
HUMAN RESOURCES (Self-Service, Payroll, Talent Acquisition/Candidate Gateway)

VB
CONSULTING

Siri Shepek

Professional Summary

- Higher Education Information Systems Professional with 14 years of experience in implementing, upgrading and supporting PeopleSoft HCM and Campus Solutions systems.
- Strong ability to manage technical resources and scope to project timelines and constraints.
- Thorough knowledge of related key business processes and common industry practices.
- In-depth understanding of the PeopleSoft data model with a firm grasp on PeopleTools and related technologies.
- Expert in analysis and design of customizations, interfaces, and conversions.
- Outstanding customer service attitude and ability to quickly develop and maintain rapport with a variety of campus constituents.

Project Experience

PeopleSoft Enterprise Campus Solutions 9.0 Upgrade
California State University San Bernardino

- Served as the Technical Lead on this upgrade from HRSA 8.9 to HCM 9.0.
- Worked closely with the campus technical team to manage and execute all application upgrade tasks.
- Retrofitted pre-existing local campus modifications to the new application / tools version.
- Managed the technical project tasks to the project resource and time constraints.
- Provided general support to the campus technical team.

PeopleSoft Enterprise Campus Solutions 9.0 Upgrade
California State University San Marcos

- Served as the Lead Technical Consultant on this upgrade from HRSA 8.9 to HCM 9.0.
- Retrofitted pre-existing local campus modifications to the new application / tools version.

PeopleSoft Enterprise Campus Solutions 9.0 Upgrade
Bowling Green State University

- Served as the Technical Lead on this upgrade from HRSA 8.9 to HCM 9.0 (tools 8.49 to 8.50).
- Worked closely with the campus technical team to manage and execute all application upgrade tasks.
- Managed the technical project tasks to the project resource and time constraints.
- Retrofitted pre-existing local campus modifications to the new application / tools version.

PeopleSoft Enterprise Campus Solutions 9.0 Implementation
University of Maryland Baltimore County

- Served as the Conversion Lead on this project to implement CS into a pre-existing HR database.
- Designed overall conversion architecture; responsible for the analysis, design, coding, and execution of the majority of Campus Solutions conversions across all modules.
- Assisted the campus technical team with the analysis and design of local modifications and reports.
- Assisted campus technical team with post-production activities.

PeopleSoft Enterprise Campus Solutions 9.0 Upgrade
University of California Santa Cruz

- Served as the Technical Lead on this SA 8SP1 to CS 9.0 upgrade project (tools 8.22 to 8.49)
- Responsible for the management and execution of all application upgrade tasks.

PeopleSoft Enterprise Campus Solutions 8.9 Implementation
California State University San Bernardino

- Served as a technical resource to this implementation project.
- Designed overall conversion architecture; responsible for various conversion, interface, reporting, and modification tasks chiefly related to the Student Records efforts.
- Assisted with project planning activities.

PeopleSoft Enterprise Campus Solutions 8 Implementation
University of Maryland University College

- Augmented another vendor's team to provide assistance with Student Records and Campus Community conversion issues.
- Gathered requirements and designed intra-campus interfaces.
- Analyzed and constructed a variety of Student Records system modifications.

PeopleSoft Enterprise Campus Solutions 8 Implementation
City Colleges of Chicago

- Led a group of campus resources to analyze identified gaps in order to aid in the issue prioritization and management.
- Explored alternatives to intrusive system modifications, identified indicators of criticality, and reported findings to the project executive team.

PeopleSoft Enterprise Campus Solutions 8.9
PeopleSoft Internal

- Served as part of a consulting team to assist the PeopleSoft CS Development Team with testing and Quality Assurance tasks for Campus Solutions 8.9.
- Collaborated with the PeopleSoft Products and Technology group in creating materials to ensure consulting field readiness prior to the release 8.9 General Availability.
- Tested Campus Solutions 8.9 Setup Manager.

PeopleSoft Enterprise Campus Solutions 8 Implementation
University of California, Santa Cruz

- Served as Technical Lead for this PeopleSoft Campus Solutions implementation.
- Conducted detailed analysis of requirements and cost of all customization requests.
- Designed solutions for all approved customizations.
- Led a team of technical resources in the conversion of Admissions and Student Records related data clusters.
- Designed and created a number interfaces, including the processing of electronic admissions applications from UCAP.

PeopleSoft Enterprise Campus Solutions 8 Implementation
University of North Dakota

- Designed a framework for the Campus Community 3Cs with emphasis on communications, checklists, mass change, and engine triggers and events.
- Provided general technical assistance to this system-wide multi-product implementation.

PeopleSoft Enterprise Campus Solutions 8 PASS
PeopleSoft Internal,
University of Michigan,
University of Wisconsin, Madison

- Member of the PeopleSoft development team to create PASS (Patriot Act SEVIS Solution).
- Aided in the data mapping, event analysis, and overall solution design.
- Assisted two Strategic Implementation Partners in the early adoption of PASS.

PeopleSoft Enterprise Campus Solutions 8 Implementation Strategy
Pontificia Universidad Javeriana, Bogotá (Colombia)

- Formulate general strategies for data conversion and interfaces.
- Assisted with the business needs assessment and with a high-level fit/gap analysis for all Campus Solutions modules.

PeopleSoft Enterprise Campus Solutions 8 Production Support
California State University, Chancellor's Office

- Analyzed converted Student Records data and Financial Aid setup relevant to the FA term build process as part of a post-production support effort.
- Provided utilities for ongoing data maintenance.

PeopleSoft Enterprise HCM Support
PeopleSoft Internal

- Assisted the PeopleSoft Global Support Center (GSC) with the analysis and resolution of customer cases filed with GSC.

PeopleSoft Enterprise Campus Solutions 7.6 / 8 Support
University of Oklahoma Health Sciences Center

- Designed and created custom SQR processes to support the operations of the Financial Aid Office.
- Customized the delivered transcript engine and transcript print process.
- Modified a custom process to load applications for admission data supplied by an external vendor.

PeopleSoft Enterprise Campus Solutions 8
PeopleSoft Internal

- Provided Quality Assurance services to the PeopleSoft development team during the system test cycle; worked directly with analysts and developers in the issue resolution process

PeopleSoft Enterprise Campus Solutions 7.6 Production Support
College of Lake County

- Provided production support for Student Records, Campus Community, and Student Financials modules.

Skills Summary

Application Software

- PeopleSoft Campus Community
- PeopleSoft Recruiting and Admissions
- PeopleSoft Student Records

Development Tools

- Application Engine
- Component Interface
- Integration Broker
- Application Messaging
- PeopleTools 8.5x
- PeopleSoft Query
- PeopleSoft Security
- PeopleSoft Setup Manager
- PeopleSoft Change Assistant
- Application Designer
- SQL
- COBOL
- PeopleCode
- SQR
- Datamover

VB CONSULTING

PeopleSoft CONSULTANT CERTIFIED Technical

Sanjeev Chitkara

Summary

- Posses a great deal of experience including 16 years with PeopleSoft Higher Education products like Student Records, Student Admissions, Campus Community, Student Financials & Student Self-Service and has been involved in the conversion, design, development, implementation, security, installation, upgrade and customization of PeopleSoft applications. Very Strong functional understanding of Student Records, Admissions , Campus Community and good knowledge of Student Financials module as well.
- Served in the role of a PeopleSoft application development, Conversion, Upgrade, Testing and Technical Lead and compliments technical knowledge with a sound functional knowledge of the Student Administration module and in depth understanding of PeopleSoft Internet Architecture (PIA), HCM modules and Security.
- Worked closely with functional business users to understand their processes, conducted data analysis, data mapping, developed data conversion specifications and has extensive experience writing interfaces and conversion programs using SQR and Application Engine.
- Extensive experience in converting data, writing Application Engine Programs, Component Interface, complex PeopleCode with file attachment, pop selection query tool and modify and create application packages, Web service, Service Operation, Integration Broker. Reports in Student Administration for the Admissions and Student Records modules using SQR, Crystal, nVision and XML Publisher.
- Extensive full cycle Conversion experience in Campus Solutions from bio demo data to residency, applicants to matriculation of data in career, program, plan to graduation including degree, degree honors and academic standings. Converted numerous times Bio-Demo Data utilizing existing search match functionality, course catalog, schedule of classes and millions of student enrollment add/drop data in student records and bring students balance forward data for tuition calculation in Student Financials to be processed using external file load and group post.
- Customization efforts include developing a custom parking pass tracking module, Self Service based Resource 25 and Event Management Development, Schedule 25, Test to Transfer Credit Interface Development utilizing transfer rules. Commencement from concept to completion in PeopleSoft using PeopleTools and PeopleCode, and combining the Class Schedule and Student Bill in order to generate one bill showing charge and payments including Financial Aid Awards. Experience Implementing Peoplesoft student Administration from 2 year community college to 4 year university and college including International Implementation.
- Involved in testing bundles, Performance Testing, SQL Tuning, Analyze and produce test cases for data to be performance tested in bulk using Load Runner and SQA Robot. Experience migrating project using Stat Third party tool and Application Designer. Have also been involved in mentoring and giving presentation on SQL, Query tool, File Attachment, Row Level Security, Mass Change and SR module from technical perspective.

PeopleSoft Project Experience

Quarter to Semester Project Technical and Conversion Lead - California State University, CA (Mar 2014 – Current)

Currently working on Quarter to Semester Project to convert CSU LA and Bakersfield Campus from Quarter to Semester. Project is under Fit-Gap Phase and would require converting quarter data into semester for 600,000 Students and perform statistics recalculation on Campus Solutions version 9.0 with Tools release of 8.53.05. To accommodate semester functionality various modifications would need to be developed as covered under Fit-Gap to prevent any changes to semester conversion. Project poses certain challenges as CSU has 23 campuses out of many are already on Semester and there will be few still on Quarters and any analysis and development would require keeping these aspects in mind.

- Performing Technical analysis on all of CSU custom development related to Q2S.
- Creating Prototype as needed for various Fit-Gap Sessions
- Research AA Requirement for what-if report to be displayed using requirement term.
- Developing Course Conversion guide setup to demo conversion guide linking quarter and new semester courses and display the conversion guide as part of Student Self Service similar to browse course catalog.
- Developing conversion prototype to demo Quarter Student's conversion to Semester.

Campus Solutions Senior Technical Consultant Sheridan College, Canada (Nov 2013 – Feb 2014)

Developed a new system for Advisors, Program Coordinators and Program Assessors to manage Students applications for Prior Learning and Assessment Recognition (PLAR). Project was completed remotely and within the budget under the given time frame.

The New System will advise students using Self Service to first contact a PLAR Advisor who will pre-assess their eligibility for PLAR and will refer eligible students to Program Coordinator for further processing. Work flow was designed to let the assessor know if they have any application to evaluate. Dashboards were designed in such a way utilizing dynamic roles and complex people code that a same component could be used by Advisor, Coordinator, Assessor and Transfer Credit Coordinator to Post the Grades. All PLAR facilitators: the PLAR Advisors, the Program Coordinators and PLAR Assessors will have their own version of the dashboard designed to support their specific scope of PLAR responsibilities. History was maintained throughout the system to track which Step the PLAR request is at.

Designed the PLAR Dashboard (People Tools 8.53, version 9.0) Utilizing People code, Application Engine, Application Package, Component Interface, Custom Dashboard Development including Self Service Development for Student, dynamic roles and respective setup

- Advisor could only Set the application to Approve or Deny for a given course and assign the application to program coordinator
- Program Coordinator can also create new PLAR application and manage the one assigned to them. Eligible Application is assigned to Assessors utilizing dynamic role functionality as Program coordinator can be assessor as well.
- Students are notified using Self Service to pay for PLAR and accept PLAR Action Plan.
- Upon Acceptance Advisor marks the application complete. Grade Posting is done utilizing Cobol and Component Interface.
- Search was designed to show all previous PLAR requests and it helps the advisors, coordinator and assessor to know which step PLAR Process is at and also show Students previous PLAR related inquiries.

Campus Solutions Senior Business Analyst/Technical Consultant
UAM, AK (Jul 2013 – Nov 2013)

Developed complex Automation to Load TS130 EDI high School transcripts for University of Arkansas using version 9.0 with Tools release of 8.53.05. Project was completed remotely and within delivered span of time.

Utilized delivered processes and new custom development to

- Purge Staging records
- Upload raw TS130 EDI file to PS server
- Load and Update Staging Records
- Search and Match to Existing Orgs & Complete the Course Data
- Search and Match to Existing People
- Resolve Matches to Existing People
- Post to External Education Tables

Campus Solutions Senior Business Analyst/Technical Consultant
NSHE, NV (Sep 2012 – Jul 2013)

Currently working on post production issues, Bundle and fix Testing and new development on Campus Solutions version 9.0 with Tools release of 8.53.05. Extensively used Peopletools such as **Application Designer, Application Packages, Application Engine, Integration Broker, Component Interface, Web services, Peoplecode, Data Mover, SQL** and **File Layout.**

- Created a very complex Transcript Web Order process which utilizes Single Service Sign to third party site using Java and people code, Extensive use of Integration broker, Web service, Application Package and Application Engine to perform Student and Alumni Check along with holds on their accounts. Created couple of web services following transcript PESC standards and utilizing decoding functionality to enable real time ordering of Electronic and paper transcript from third party vendor site. Web Service will also provide notifications to the registrar office if the transcript is failed to be delivered and will also update the third party system to mark as delivered upon delivery of paper transcript.
- Developed a mod to place code in the system that will have the ability to recognize what portal the user has signed in from and will also determine which LDAP server to authenticate to.
- Created a Conversion Application Engine process utilizing Component Interface and Stats Recalculation to select students with AP, CLEP, and IB test scores posted to the test results component; fetch the test scores; evaluate the test scores; for students earning appropriate scores, post the course, grade and earned hours to the students' Student Transfer Test Detail (TRNS_TEST_DTL) record and update the student's term record where necessary. The conversion will post model on test credit side and unpost and wipe out data from transfer credit tables and update Statistics on the Transfer and Test Credits for Students
- Developed Printer Friendly Page for Graduation Status Tracking along with some other customizations to display fast track hours for graduating graduate students otherwise causing paper waste being sent back and forth from the Graduate Dean's office to the departments. Modified the page to include ability to communicate with the students about deficiencies in the graduation status area in self service. Added a column for core and elective information for the Graduate Dean.
- Modify Web Service to Sync up Job data between HRMS and Portal. Customization enables the automatic assignment of roles by providing information from HCM to the Portal. The actual assignment is initiated from the Portal and pushed to the other PIAs such as HCM, Finance and Campus solutions.
- Created an interface Application Engine program for office of accessibility to produce multiple files related to Student Bio-Demo and Course Information. The Office of Student Accessibility has contracted with an external software company called Simplicity to provide their software service called Accommodate
- Completed Technical and Functional Specs and wrote extensive amount of People code at various Class Schedule Component to give academic department Users ability to participate in the setup of class scheduling.

The access to do scheduling updates needs to be granted to a department scheduling role that is only open for making updates to the scheduling before the session scheduling date. The defined window of time that a department person can make changes will be determined by a new date added to the system. The software modification will check the date and the predefined User role name, when the session scheduling date has passed the screen will get the fields grayed out so that the pages are not updateable. The Records Office security role will not be limited by the session scheduling date.

- Developed a process to fix names that were entered in Lower Case, Upper Case and Notify Users if there is any numeric in the names. This process would help displaying the name in correct format on Self Service.
- Implementations lead for OnBase third party products to post a student's external education data into PeopleSoft, in a real time fashion (via OnBase workflow/OnBase EIS/PS Web Services). The external education data is either extracted (OCR'ed) from paper transcripts or from electronic transcripts. Apart from the posting external course information, the product also gives our clients the ability to check (real-time) for existing Course Equivalency Rules in PeopleSoft, for that external school from which the transcript was received. This would result in identifying the courses that do not have a Course Rule setup in PeopleSoft and will automatically create a workflow task to notify the appropriate group about the same.

Student Records Technical and Semester Conversion Project Lead
The Ohio State University, Columbus, OH (Jan 2011 – Aug 2012)

Completed semester project to convert quarter data into semester for 900,000 Students and perform statistics recalculation on Campus Solutions version 8.9 with Tools release of 8.5.1. To accommodate semester functionality various mods have been written to prevent any changes to semester conversion and to look for any changes prior to converting to semester and perform recalculation of statistics.

- Completed Technical Fit/Gap, Analyzed and Estimated semester modifications across all modules for Quarter to Semester Conversion.
- Developed Application Engine Program to convert quarter to semester data for all students except students in Law career and deceased. As part of the process student's future stats were recalculated and transcript text data was converted to display Quarter vs. Semester cumulative data on Transcript. Created New Permission List for the custom component and attached it to the new role and assigned to users.
- Developed Application Engine Program to convert satisfactory academic progress for financial aid into custom SAP conversion record.
- Using people code, determined where in the system changes have been to the system prior to semester conversion and reconvert statistics, SAP for Financial aid and transcript text to prevent semester data being switched to quarters. Some of the main components where changes are frequently made are Quick Enroll, Term Activation, Term Withdrawal, Grade Posting, Transfer and Test credits and Block Enrollment.
- Disable functionality in the system using people code to prevent any changes being made to converted semester data. Created a custom role which will only be assigned to the user if ever asked and custom role will let users make change to the placeholder term.
- Created adhoc functionality to process stats recalculation on a student by student basis.
- Created nightly batch job to pick up any students whose data have been converted back to quarters and reconvert them back to semesters and also to be used as an add-on to other batch process in system like lapse grade, which could affect student's semester data.
- Modify Transcript to display comparison of cumulative data between quarters and semester. Cumulative comparison is only shown if students are enrolled or have transfer or test credit beyond semester conversion.

Student Records and Student Financials Technical Development
Strayer University, Washington, DC (Jan 2010 – Dec 2011)

Successfully implemented Campus Solutions version 9.0 with Tools release of 8.5.1. Completed all of Strayer's Student Records Customizations involving self-service, other online and batch customizations including notification to students using COMM GEN and XML Publisher. Written numerous inbound and outbound interfaces for Student Financials.

- Using XML Publisher, COMM GEN, 3C Engine, Triggers and Application Engine created functionality to produce critical grade and academic status notification to students.
- Written complex batch process to assign advisors for new students. Process also has the functionality to remove advisors for graduated and students with 4 consecutive terms of non-enrollment and to replace existing advisor with a new one as of the date specified.

- Developed various other batch processes using application to discontinue inactive students, drop students missing 4 consecutive classes and warn them using XML and COMM GEN when they are absent for 3 classes, Populate students special GPA from academic advising tables.
- Strayer University have around 80 campus, custom functionality was created to have self service class search driven by selecting multiple campus and multiple mode of instruction as delivered search can only be performed by one campus only. Extensive use of people code on self service Enrollment to let students search for classes by their home campus and all other class search fields are pre populated when selecting a course from my planner.
- Developed faculty Self Service Attendance to allow instructors of brick and mortar campuses and online synchronous classes to enter attendance data for their own classes on faculty self service. Once posted instructors cannot change attendance any more and the same is valid if grade period has been ended or grade roster has been posted. Helped with inbound interface to load attendance for asynchronous online classes from eCollege and Blackboard.
- Limit Campus access to class search once the term has started and limit campus access to data of their own campus.
- Written inbound and outbound interface for Student financials related to External Collection to be send to various collection agencies for assigned students and to update them back if payment has been made or if there is an increase or reduction in their balance. If any payment has been made to the collection agency it will be processed using external file load and group post process. Other interfaces included Great Plains Refund with various excel based files for distribution, vendor and voucher. Third Party Invoice was created using application engine program to create an excel file to include students account and course information related to third party charge.
- Create a process to be run in between GL interface and Great Plains interface to turn generic journal entries into campus specific entries by transaction.

Student Records Technical Lead
The Ohio State University, Columbus, OH (Apr 2006 – Dec 2010)

Successfully implemented Campus Solutions version 8.9 with Tools release of 8.49.1 Managed and mentor team of 7 developers and completed close to 100 Student Records Customizations, Course Catalog Conversion and new developments including completely new functionality like Commencement, interface with Athletic system, , modified Schedule 25 and redesigned Resource 25 completely in PeopleSoft.

- Completed Technical Fit/Gap, Analyzed and Estimated modifications across all modules including Admissions, Record, Financial and Financial Aid.
- Developed Technical Designs and helped developers understanding the functionality of the system to implement the modifications in timely and efficient manner.
- Developed Resource25 System in PeopleSoft as no room search function was available and required that client be installed on Approx 200 users PC. To Implement this functionality Campus Events and Meetings were completely modified to generate multiple appointments, Room Matrix Page was designed and developed using complex PeopleCode and HTML to show room with hours down the side and days across the top and what is scheduled in each block, Additional Security was built in the Whole Event management System so requester can see his events and approver can see everyone's and within in that Org level security was implemented so some approvers can only approve the event related to their own department. Additional functionality was implemented in room matrix so it could be used by campus police to see what all is going on a particular day.
- Modified Term Roll Process, Schedule 25 extract and upload Process to Assign Events if the room has been assigned, various program changes were made to implement this functionality for combined sections. Created Text file out of PeopleSoft for input into S25 to Schedule 350 general-purpose classrooms and assigned facilities and events using the upload process. Additional Security was implemented to limit departmental access to modify instructor assignment and enrollment limits in the custom page after the S25 process has been run and at certain time period all of the Schedule of Classes components will be changed to DISPLAY ONLY.
- Numerous complex batch programs were written using Application Engine and Component Interface involving File Attachment, File layout and some including Query Pop Selection to load data using Query tools. Pages were designed in efficient manners to have user use one of many options to run the process. Some main Batch Process included Intra University Transfer Campus Change, Missing Grades, Grade Upload and Partial Post, Student Groups and Advisor Upload, Load and Remove Service Indicator and Post test Scores. Many of these process required extensive PeopleCode and SQL knowledge and knowledge transfer was being given to OSU technical staff as modifications were being implemented.
- Helped out with Design and development of Grade Upload Web service using Application Package, Web Service

and Service Operation.

- Completely redesigned and helped developing commencement system in PeopleSoft and various online setup records and pages were developed and custom commencement component was created to interact with Career, Program, and Plan when student applies for Degree. Various SQR processes including reports were designed and developed to print commencement program, commencement and board of trustee's bulletin in excel file, diploma and diploma statistics, Address labels, Commencement ceremony and to update degree honors.
- Helped developers build validation queries out of PeopleSoft and Legacy to validate converted data and was very useful during Conversion Go -Live
- Added the 3C Engine Trigger PeopleCode to several records to allow automatic assignment of 3C items when data is inserted or changed in these records.
- Currently Supporting Production Support for quick turnaround of production issues and working on developing exam scheduling and Credentials Transcript Plus interface with PeopleSoft.
- Involved in analysis and set up of run controls to schedule the jobs in AUTOSYS
- Completed technical specifications for Custom Application for new professional students and college net nightly interface to load student's undergraduate application.
- Completed various admissions technical specs including label creation for Prospects and uploading reader assigned to an application, evaluation status and committee decision into Application Evaluation Component using Application engine utilizing file layout.
- Helped creating Synchronous Inbound Web service to upload grades from Carmen.
- Implemented Transcript interface for third party vendor using Robo Registrar

Admissions, campus Community and Student Records Technical and Upgrade Lead
Southern Wisconsin Consortium, Madison, WI (Aug 2006 – July 2007)

Includes 3 Community colleges – Madison Area Technical College, Western Wisconsin Technical College and Southern Wisconsin Technical College. Campus Solution Upgrade from 8.0 to 8.9 PeopleTools 8.48

- Analyzed DDDAUDIT and SYSAUDIT Reports
- Completed Technical Fit/Gap of all SWC Customizations
- Tested all Admissions, Campus Community and Student Records online and batch customizations and Migrated/redeveloped successfully from version 8.0 to 8.9.
- Online Customizations were related to Application Entry & Maintenance, Search Match, Course Catalog, Quick Admit, Enrollment Request, Transfer Credit, Class Roster and Student Grades. Batch Customizations were related to Catalog, Class Roster, Grade Roster, Schedule of classes report, Custom Query/Crystal reports and Transcript.
- Developed new Relationship with Institution page that will give Students details related to all 3 colleges.
- Helped SWC with IVR System So students can register for courses and pay parking fees over the phone. With version 8.9 IVR was not able to Enroll Students into Class, Debugged and completed PeopleCode modification to handle registration and parking issues.

Technical/Conversion Lead
Peralta Community College District, Oakland CA (Sep 2005 – Mar 2006)

Includes 4 Community Colleges - College of Alameda, Laney and Merritt Colleges in Oakland and Berkeley's Vista Community College. Student Administration 8.9 PeopleTools 8.46

- Responsible for the process scheduler, application server administration and database refreshes for the model and conversion environment at PCCD as a Technical/Conversion Lead
- Completed technical fit gap to determine all the customizations needed at PCCD.
- Involved in bringing the setup and transaction data from HR 8.8 to Campus solution 8.9.
- Handled MIS320 bolt on project for California community colleges and is responsible for supporting as per PCCD needs.
- Support all of the Student modules and compiling COBOL processes.
- Worked closely with Functional end users to convert all of the data from legacy system.
- Other responsibilities include converting all of the data for admissions, records and student financials.

Conversion Lead

Cambridge University, Cambridge, United Kingdom (Sep 2004 – Aug2005)
The University of Cambridge is one of the oldest universities in the world, and one of the largest in the United Kingdom. University consists of 31 Colleges and is the first one in UK to Go Live on Admissions Campus Solutions in October 2004. Student Administration 8.0

- Worked as a conversion lead and is responsible for central records conversion and College data conversion. Central conversion is from an Oracle based system called SRS.
- Successfully migrated Undergraduate and Graduate Catalog from SRS to Peoplesoft Learning Solutions 8.0.Worked on creating Class schedule for enrollment conversion and building Schedule of classes for Easter 2005 for all currently active courses.
- Wrote complex conversion program to create Students program, plans and subplans.
- Developed program to convert enrollment history from year 1920 onwards in an efficient way to bring down the timings from 3 days to 6 hours for around 3 and a half million-enrollment records.
- In UK University system marks ranks and prizes are awarded to the students, worked on attaching student's marks and ranks to their enrollments once posted.
- Convert various colleges' data from home grown and 3rd party systems to one central peoplesoft system

Technical/Conversion Lead
Western Wisconsin Technical College, La Crosse, WI (Aug 2003 – Aug 2004)
Western Wisconsin Technical College (WWTC) is part of the Wisconsin Technical college system and of the Southern Wisconsin Consortium (SWC) and serves close to 30,000 students.

- Acted as Technical and Conversion lead to convert all admissions and records data from homegrown mainframe system called 1032S to Peoplesoft Learning Solutions 8.0.
- Wrote various SQL scripts to move all the setup tables from the version 7.6 server to the 8.0 server, by linking databases within the SQL scripts.
- Wrote complex conversion programs to convert all student demographic data to avoid duplication based on their SSN, last name and birth date combination. This was necessary since the consortium has a complex system in which student moves between three technical colleges, two of which are already live in PeopleSoft.
- Developed all of the conversion programs for data from bio/demo to program plan data, Transfer Credit and almost one million enrollments including historical enrollments.
- Also converted data for the other two schools in the consortium and supported all of their technical needs and post-production issues while working on conversion for WWTC.

Technical/Conversion Lead
Rose State College, Midwest City, OK (Jun 2002 – July 2003)
Rose State College is a member of The Oklahoma State System of Higher Education and enrolls close to 7000 Students per Term and had a very aggressive time line to complete the project. Project was completed under the time and stayed on budget. Student Admin 8.0

- In his role as Technical and Conversion co-lead, worked closely with functional end users to gather the requirements for conversion and customizations.
- Converted student administration data including bio/demographic, Catalog and Schedule, Program Plan and Degrees, Enrollments and Transfer credits
- Wrote programs to activate students who had enrollments by populating the custom term activation tables and running the term activation process.
- Developed a Student Class Schedule and Bill that calculates student tuition and fees and displays charge and payments including financial aid awards. Half of the page displays student class schedule and other half displays the student bill.
- Also developed Enrollments Comparison and Student Deficiency reports and designed Final and Temporary Class Rolls for the instructors using SQR and Crystal.

Technical/Conversion Lead
Madison Area Technical College, Madison, WI (Apr 1999 – May 2001)
Madison Area Technical College (MATC) is a part of Southern Wisconsin Consortium (SWC) and is one of the largest of the Wisconsin Technical College system schools serving approximately 50,000 individuals annually. Student Administration 7.6

- As technical and conversion lead for the project, mapped and validated data in the test database before loading into PeopleSoft production tables.
- Converted student administration data including bio/demographic, Catalog and Schedule, Program Plan and Degrees, Enrollments and Transfer credits, and ran COBOL programs using SQR to automate Term Activation and enrollment and transfer credit posting.
- Wrote numerous SQA Robot scripts to post test and other credits, generate event identification for class meeting patterns and Student Financials.
- Customized the Term activation process to activate students in financial aid eligible programs, and modified the delivered NSLC program to work as required by MATC.
- Provided production support after Go-Live, by assisting programmers and users with SQL, Query, Crystal, and SQR programs, and by debugging PeopleCode and panel customizations.

Technical Consultant
University of Houston System, Houston, TX (Oct 1998 – Mar 1999)

The University of Houston System consists of four universities—the University of Houston, UH-Clear Lake, UH-Downtown and UH-Victoria. The combined enrollment of all four campuses is approximately 50,000 students. Student Administration 7.6

- As Senior Technical consultant, successfully implemented the Admissions and Records modules of PeopleSoft Student administration 7.6.
- Wrote conversion programs and interfaces to load validated data into PeopleSoft tables, and written Data Mover scripts to move the data between conversion, testing and productions databases
- Performed numerous customizations to class schedule, course catalog, class and grade roster reports, which involved panel and SQR changes.
- Developed a new Police Parking system that required the creation of a student/employee parking data entry panel with robust functionality and an interface with the Student Financials module.
- Converted student/employee parking and license data from the legacy system to PeopleSoft to support this new system.
- Automated all Admissions Mass Change processes to run on a daily basis through the process scheduler, which involved building new panels and job definitions, changing delivered SQRs to adopt the automation for mass changes, and saving the mass change each time a new group of students is picked up.
- Responsible for the development, maintenance and testing of all the Student Admissions and Records reports, and led a team of graduate students through the task, which was successfully completed on time.

Technical Consultant
Rhode Island College, Providence, RI (Feb 1998 – Sep 1998)

Rhode Island College serves approximately 9,100 students in undergraduate and graduate courses and programs both on and off campus.

- Responsible for developing data conversion specifications, data mapping and analysis, and also written conversion program to convert academic standings for all students.
- Worked closely with the Registrar's Office in developing admissions letters, which included developing several customizations.
- Developed new admissions reports allowing the comparison of data for last year and the current year at the same time.
- Incorporated security to avoid duplicate SSN and additional faculty security to avoid deletion of rows, which was affecting functionality of other records.
- Helped end users develop queries using PeopleSoft Query, and wrote an SQR to generate student RIC email addresses.

Technical Consultant
Trinity College, Hartford, CT (June 1997 – Jan 1998)

Trinity is one of the nation's oldest and finest colleges and serves around 2,500 undergraduate and graduate students. Student Administration 7.6

- Wrote, maintained and modified custom Student Records reports for enrollment and grades, and generated over 60 custom reports in different areas of Student Administration.

- Gained extensive knowledge of the Process Scheduler while automating the scheduling of batch processes for Crystal reports.
- Debugged and maintained custom modifications and PeopleSoft delivered SQRs, and ran traces and reviewed SQRs to identify software bugs and process failures.
- Developed a Marriott Interface to assign the actual student meal plan from the Marriott meal system, and developed an interface for the PowerFAids financial aid system to send student information and enrollment statistics.
- Worked closely with end users in determining specifications and in testing converted data using outputs from the legacy system.

Other Project Experience

Quest Diagnostics, Newark, NJ
Quest Diagnostics is the nation's leading provider of diagnostic testing, information and services.

- Responsible for entering Employees Benefit and Leave Accrual information using peoplesoft 7.5
- Short term project
- Most tasks related to handling employees' Benefit information in HR system

Technical Skills

PeopleTools 8.5, 9.0 Peoplesoft Applcations, Oracle 10g, SQR, SQL, PLSQL, Application Engine, PeopleCode, Component Interface, Crystal Reports, PS Query, C/UNIX, COBOL, n/Vision, Mass Change, SQA Robot, Import Manager, PSADMIN, Security, Web Services, Integration Broker, XML, Data Mover, Work Center, Toad, Stat.

Education

Bachelor of Science in Engineering
M.I.T India

Masters of Business Administration
CSM India

Certifications

PeopleSoft Certified Technical Consultant

Industry Presentations

"Mass Change in Student Administration"
PeopleSoft HEUG (Higher Education Users Group)

References

Name of Reference / Reference Title	Institution/ Address	Phone/ Email	Project/Consultant's Role

Shari Beane, Project Manager	The Ohio State University, OH	614-766-6661	Student Records Technical Lead
Sam Islam SR Lead	The Ohio State University, OH	832-366-6307	CS Business Analyst
Isabelle Millen, Associate Director	Rose State College, OK	405-733-7356	SA Technical and Conversion Lead
Stephen K. Hineline, Project Manager	Madison Area Technical College, WI	608-246-6125	SA Technical Consultant and Conversion Co-Lead
Kris Mullaney	The Ohio State University, OH	937-209-3838	Student Records Technical Lead

VB CONSULTING

Vasu Kaava

Sr. PeopleSoft Technical Developer

Professional Summary:

- Years of experience as a Programmer / Consultant / Developer / Analyst in the IT industry which includes **14 years** as a **PeopleSoft Technical** consultant and Analyst.
- Worked extensively in Application Upgrade from PeopleSoft 7.5 to 9.x and also on a split project for HCM and Campus Solutions.
- Hands on Experience with PeopleSoft **HRMS 9.2** application and **People Tools 8.53.**
- Extensively worked with Self Service (MSS, FSS, ESS and ASS) modules.
- Significant experience in PeopleSoft HRMS, Benefits, Benefits Administration, Payroll, Time and Labor and Student Administration, Student Financials, Financial Aid, Campus Community Modules and acquired diverse skills through successful execution of a variety of Projects.
- Complete exposure with all the new enhancements in People Tools 8.53.
- Complete working experience with PeopleSoft Payroll, Ben admin and Time administration processes.
- Experienced with ADP payroll and development of Interfaces to load data from flat files to ADP and ADP to flat files.
- Extensive experience with development of interfaces to load the data from Kronos into Peoplesoft Payroll system tables.
- Writing SQR Code to send automatic eMails to the specified users with the specified data after running the SQR interfaces.
- Working with GSC cases for delivered problems.
- Writing Peoplecode to send automatic emails after submitting of pages in Self Service applications to the specified users with the specified data.
- Experienced with Applying bundles, Tax updates and compare reports.
- Experienced with Convoy/DM tool for Data conversion without writing SQRs.
- Experience in gathering requirements from business groups, writing technical specifications, coding and Test plans.
- Extensively with data mapping and data conversion in different projects.
- Excellent working knowledge in PeopleTools (including Application Designer, Security Administrator, EDI Manager, Process Scheduler, Data Mover, Import Manager, Operator Security, Object Security, Workflow and Crystal Reports
- Excellent working knowledge on reporting tools like Cobol, SQR, Crystal reports, nVision, Cognos, OLAP, Brio SQR and Business Objects.
- Performance Tuning and People soft Debugging.

People soft Skills:

Administration Tools	Configuration Manager, Application Server, People Tools Utilities.
Development Tools	Application Designer, People Code, Application Engine
Integration Tools	Message Agent, EDI Manager and Component Interface
Reporting /Analysis Tools	SQR, Crystal Reports, nVision, PS Query, Cube, Tree Manager, Process Scheduler, LDAP, Process Monitor, Convoy/DM and STAT.
Data Management Tools	Data Mover, Mass Change, Cube Manager, Cognos Power Play
People soft Security Tools	Security Administrator, Object /Query Security, Tree Manager
Data Conversion Tools	SQR,Convoy /DM,Informatica.

Technical Skills:

ERP	People soft (HRMS/HCM and Financials) 6 / 7/ 7.5 / 9.x
GUI	Visual Basic, Developer 2000, Forms 4.5/5.0/6i,
Languages	C, C++, SQL, COBOL, PL/SQL, Java, HTML, Java/VB Script

'eb Tools	Coldfusion, Java, ASP, XML, DHTML
atabases	Oracle, SQL base, SQL Server, DB2, MS Access, Sybase
esting Tools	WinRunner, Test Director, SQA, Silk Test, Load Runner
ata Warehousing	Erwin, Cognos, Business Objects, Informatica and SQL Loader
perating Systems	**Win**' 95/98/2000/NT/XP, MVS, UNIX, Linux and DOS

rofessional Experience

hio State University, Columbus, OH. **01/2012 to Present**

eoplesoft HRMS and Campus Solutions UpGrade (Split) Project (8.9, 9.0 and 9.2).

- Developed a SQR to create the training lists based on an entered date. Employment will be enter the date of the Training Class and the type of class. The list will contain all applicants that have the training class scheduled for that date.
- Developed a SQR process (RCP Limits Eligible / Ineligible Report). This process needs to report and create a PDF & a DAT file of all the eligible and ineligible employees for the RCP when the employee is approaching their base retirement plan limit.
- Developed new components GFA Item Type Groups, GFA Account Rules and GFA Fund Rules in PeopleSoft HRMS 9.2 based on the existed functionality of PeopleSoft Campus Solutions 9.0.
- Created Data Mover scripts and SQL scripts to convert the data from the existing Records to new custom records.
- Developed Fee Authorization Central Component in HRMS 9.2, from scratch based on the existed Student Financials functionality in Campus Solutions 9.0, to provide one central component to view Fee Authorization eligibility for EFA, DFA and GFA (Fee Authorization – OSU Tuition Benefit for Employee (EFA), Dependents (DFA), Graduate Students (GFA), and Retirees).
- Modified the delivered Student Budget Maintenance page (STDNT_TERM_BUDGET) and a push button, 'Zero Budget/INAS' is added. This push button invokes the functionality to add an effective dated row with all budget amounts equal zero to the budget table.
- Developed a custom page that is keyed by Institution, Aid Year, Item Type and Career. A new setup page is aslo created that would allow a user to input the valid careers for the Item Type. Added this new setup page as a new Tab on the Financial Aid Item Type Setup menu.
- Modified the search dialog pages that are accessed from Financial Aid Item Type and the lookup of item type on Award Entry component to include the short description of the Item Type.
- Modified Packaging Status Summary page to reflect OSU business requirements.
- Developed a process that is based on specific criteria, will assign a required checklist item and assign a communication to a student that is required to complete an exit interview.
- Created custom records/pages/components to allow entry and storage of student security holds and staff security access.Added component level PeopleCode to check for staff access in relation to the individual student before loading the pages.
- Modified View Financial Aid Status page to meet OSU requirements.
- Modified delivered Create Driver Recs process (FAPTRMU1.sqr).This process will identify students who have more than 100 records in the Driver table.
- Modified delivered view of ALIEN_REG2_VW.
- Created OSU Study Abroad Application component per the OSU requirement.
- Developed SEVIS Summary Page. This page will have summarized information about the visa holders and also links to other pages that have more detailed information including their Bio/Demo and visa profiles and history information.
- Developed a SQR (Audit Personal Data Information) Report to review the personal data of a person those got hired as an employee and reports department wise if any key information is missing.
- Developed Technical Design Documentation with all the new enhancements, developments after complete testing.

Environment : PeopleSoft HRMS/CS 8.9, HRMS/CS 9.0 and HRMS9.2, People Tools 8.49, 8.50 and 8.53, SQR, PS Query, Web Services, Data Mover, Oracle and Windows

ıdiana State Govt. Project **01/2010 to 12/2011**

ıdianapolis, IN.

)ata Conversion and Implementation of Peoplesoft HRMS 9.1 for State of Indiana,IN.

- Worked with Public Employees' Retirement Fund (PERF), Indiana State Teachers' Retirement Fund (TRF), Indiana Pension Systems Inc (IPSI), Pension Applications Technology Support (PATS) and Benefits Management System (BMS) for Indiana State Govt. Project in Indianapolis, IN.
- Extensively worked People Tools 8.51 to modify the delivered HR, Pension and Benefits Pages.
- Developed a Cross Reference spread sheet which gives us the complete details of the legacy ERM column names and proposed PeopleSoft custom field names and their description.
- Developed approximately 400 new PeopleSoft custom fields in DEVPS2 App Designer.
- Developed 80 new PeopleSoft Views and more than 40 Records in App Designer.
- Worked with ACS Pre-Note Bank Information Issue and developing of new custom Interface to send pre-note details data to JP Morgan Chase (JPM) for any members with new/updated direct deposit set-up.
- Developed an Interface program to load data from ACS Feedback File to PeopleSoft tables. The ACS Feedback file will contain several record (5) types of data in a single file. Based on the record type, the data will be inserted in different PeopleSoft delivered and custom tables.
- Developed an Interface program to extract ACS Benefit Payment Information from a flat file and to load the same to PeopleSoft custom records.
- Developed an Interface program to read and insert Pension Pay Check info into a Custom Check History table.
- Customized the PeopleSoft delivered Review calculation Results component to provide the capability to generate survivor payments specifically to dependent children and split the payment equally based on the number of dependents.
- Developed a new component to View Xerox Balances on-demand with out inserting Xerox Balances data into PeopleSoft custom record. We can view Xerox Balances data at any time. We can view multiple times and each and every time we can view current updated Xerox Balances data.
- Developed a new report 5year Guaranteed Option Death report to identify all beneficiaries that should have benefits stopped at 60 payments by including a listing of all survivors who received 59 payments and are due to be terminated.
- Developed an Interface to generate Additional Pay Audit report and One Time Payment Audit reports.
- Developed new Components from scratch to display the data based on the Emplid, Benefit plan, Pension Calculation name, Pension Option choices.
- Developed new pages Pension process, Annuity Election, Basis Recovery Calculation, Annuity Calculation, Non-Taxable Calculation, Non-Taxable Payment Tracking, RSA Account, Distribution Account pages to display the data based on the user inputs.
- Developed a Payees Report XML report using Application Engine, PS Query and XML Publisher to generate a report to identify New Payees, Changes to Payees and Payees with Stop Payments by a comparison of the current month's Payee Authorization file to that of the prior month.
- Worked with Web Services and Integration Broker and written People code to get the data from Legacy system to PeopleSoft Pension tables.
- Developed a Component Interface to update the Payment schedule component with custom Pension calculation data.
- Developed an Application Engine program and a Component Interface to update the Worklist status based on the the Pension process component data.
- Modified PeopleSoft delivered Pages and Components and written Peoplecode to display Pension ID instead of Empl ID on all the Pension related Pages and Components like Job Data, Biographical, Capture Comments, Identify Pension Status, Administer QDRO, Create Payee and Request Payment Schedule etc. Components.
- Development of technical design document after completion of the issues with all the new enhancements and modifications for the existed objects.

Environment : PeopleSoft 9.1, People Tools 8.51, SQR, Oracle, App Engine, CI and Windows

'eoplesoft Consultant, **06/2009 to 12/2009**
{aiser Permanente, Pleasanton,CA.

- Extensively worked with HR, Benefits and Interfaces in HRMS.
- Developed a new HRA page to populate the Job data and pension service years data on the HRA data based on the Emplid.
- Written Peoplecode to validate the data based on the Emplid and Empl Status.
- Development of Hewitt Pension Service Interface to load the data from Hewitt text file to PeopleSoft custom tables.
- Developed Audi Records to capture the online changes.
- Written SQL scripts to create database triggers to capture the database changes and online changes.
- Developed database triggers to capture the database changes.
- Involved in Unit testing and UAT testing.
- Involved in migration of projects between different environments and worked with STAT and Remedy.
- Involved with user interaction to gather the requirements and developed Technical Design (TD) Document based on the Functional Document (FD) and business requirements.
- Involved in development of Test Plan (TP) and Test Results (TR) documents based on the new enhancements and developments.
- Developed SQL scripts to develop database level triggers for audit records.

Environment: PeopleSoft 8.8, SQR, AE, CI, DB2, Main Frame and Windows

California State University (CSU),Turlock, CA. **09/2007 to 05/2009**
Student Records Data Conversion (Banner to PeopleSoft)

Worked with data conversion from legacy (Banner) system into PeopleSoft.

- Customized existed PL/SQL Conversion scripts to meet campus specific requirements.
- Written People code to add functionality to the custom pages.
- Development of crosswalk tables for data conversion.
- Developed reports from Banner Data.
- Created temp tables in Banner System before data conversion.
- Worked with security.
- Worked with the following data conversion scripts.
  - SXPCAT1 : To insert rows into catalog conversion key table.
  - SXPCAT2 : Build a row in the catalog conversion Banner values table SXRCBAN.
  - SXPCAT3 : Populate catalog crosswalk tables with values from either csv files in data load directory or values from generic oracle crosswalk table(s).
  - SXPCAT4 : To create a text file to load into Peoplesoft.
- Created the following External Tables to import the cross walk data
  - sxtccms_xwalk1 – create_sxtccms_xwalk1 –for academic group cross walk
  - sxtccms_xwalk2 – create_sxtccms_xwalk2 –for academic organization cross walk
  - sxtccms_xwalk3 – create_sxtccms_xwalk3 –for attribute cross walk
  - sxtccms_xwalk4 – create_sxtccms_xwalk4 –for cs number cross walk
  - sxtccms_xwalk5 – create_sxtccms_xwalk5 –for grade basis cross walk
- Created the following temp tables during data conversion.
  - SXRCKEY – Temp Table for Catalog Conversion to CMS - 1 key
  - SXRCBAN –Temp Table for Catalog Conversion to CMS - 2 BANNER
  - SXRCCMS – Temp Table for Catalog Conversion to CMS - 3 CMS
- Developed data mapping spread sheets using Banner data.

- Inserting data into Banner crosswalk tables from data mapping spread sheets.
- Developed validation scripts to test the data after data conversion.
- Modified Application Engine process as per the requirement.
- Involved in development of technical design documentation after completion of the technical development.
- Interaction with functional users.

Environment: PeopleSoft 8.9, People Tools 8.46, SQR, Banner, PL/SQL, App Engine and Windows

Florida A&M University, FL **07/2006 to 08/2007**

Implementation of PeopleSoft HRMS and Student Administration

- Developed Vendor Interfaces (vint0150, vint0020, vint0030, vint0060) for Dental,Vision,Medical and FSA as per user requirements.
- Developed a new SQR to list the Students with the Academic Plans for the period of spring 2005 - spring 2006.
- Created a SQR process to place Positive Service Indicators and insert a new row in audit record.
- Developed a new Application Engine process to load flat file data into PeopleSoft Student record tables.
- Extensively worked with Direct Loans, Student Budgets and Pell Payment Processing.
- Developed a new Component Interface to populate into PeopleSoft Student record tables with flat file data.
- Development of programs from functional specifications and from tickets.
- Developed technical design documentation after completion of the technical development.
- Giving demo to functional users after completion of the user requested reports and issues.
- Developed US Survey Financial Aid Report.
- Placing Service Indicators using background process.
- Developed new Pages and components for Students Self Service module.
- Developed a new SQR to list the Students graduating from SBI for the period of Spring 2000 - Spring 2006.
- Developed a new SQR Report for Average and Median SATI and EACT scores by each component and Total.
- Developed a report for Active Full-time Students with their ID, SSN and Name.
- Developing SQRs for FACT Sheet and a Fundable Credit Hour report.
- Developed Query Inventory Report.
- Developed a new report to list the currently enrolled students - U.S. citizens - GPA of 2.5 or greater - and have at least 54 semester hours earned at FAMU
- Developed a report which gives the Number of FCC Transfer Students who were Enrolled in Spring 2006, Summer 2006, and Fall 2006. Sorted by academic plans/majors.
- Developed a report to give the list of students in Environmental Science Institute (ESI) (Major/Academic Plan = 01101) who have taken the CLAST exam. Sort by terms. Include the student's name, CLAST date (by term), and scores in Excel spread sheet.
- Developed a new SQR report which gives the Enrollment Update for summer 2006
- Developed a new SQR report which gives the Summer 2006 Final SDCF and Total Head Count.
- Developed an Excel Spread sheet report to give the stat data for fall 2006 FTC, FCC, TRF, GRD, LAW applied, admitted, and enrolled (full-time/part-time)by gender and race.
- Worked with Financial Aid CDS 2006-07 Report.
- Developed a new SQR from scratch to create a report for the Average SATI Verbal, MAT, Writing, Essay and EACT Composite for fall 2006 admitted and enrolled FTC applicants by term.
- Developed a new SQR from scratch to generate the count of students that were awarded degrees for the last 5 years. Sort by academic plans. Sort by degree type. Sort by gender. Sort by ethnic origin.

Environment : Peoplesoft Student Administration 8.0/8.9, SQR, DB2, Oracle and Windows.

Iniversity of Houston,TX **01/2006 to 06/2006**
nplementation and Upgrade
'eoplesoft HRMS and Student Administration 8.0/8.9

- Extensively worked with Peoplesoft Campus solutions 8.9.
- Extensively worked People Tools 8.46 to develop Peoplesoft objects from scratch.
- Developed a Self Service page to let students select Book Loans online.
- Modified PS Self Service to allow students to request their refunds online.
- Developed Application Engine Programm from scratch to load test scores individually by each campus.
- Developed custom fields,recors,pages and components from scratch as per the requirement.
- Worked with Excel to CI tool.
- External test score loading in PS is a multi-step process the first step is loading the Test scores into PS staging tables. The last step is to purge the staging tables. These tables are not institution specific. All three institutions would share the staging tables. There is a distinct possibility that two or all three institutions would own data in the staging tables at the same time. Developed institution specific processes to solve this issue.
- Created custom Fields for State Reporting. Data should be stored in a custom record and displayed on and entered from a custom page and component.

Environment : Peoplesoft Student Administration 8.0/8.9, SQR, Stat, Oracle and Windows.

City Colleges of Chicago (CCC), Chicago, IL **04/2005 to 12/2005**
Implementation of PeopleSoft Student Administration

- Customized and developed Student Records' Class pages for delivery systems and developed/altered custom/delivered Record Definitions, custom Menus using PeopleTools and PeopleCode.
- Extensively worked with Application Designer to modify the record definitions, Pages, Panel Groups, Menus, Process Definitions, and Security Administrator.
- Developed SQR from scratch to display the Seat counts in Class Data component.
- Developed SQR from scratch to Calculate Seat Counts based on Stat, Census and Mid Term Dates.
- Written people code to add additional edits to the Adult Education page.
- Created a custom process to insert the next Fiscal Year on the Adult Education page.
- Customized Adult Education page as per the requirement.
- Written People code to add additional edits to the Schedule of Classes
- Modified the SQL view behind the Location field to more accurately look at locations
- Customized Class data component to set flags on the class section to control class section offerings available in self service for enrollments and drops
- Customized the Equation Variables page
- Provided a way using people code to prevent changes to the Schedule of Classes once a term is complete.
- Provided a way using people code for the system to automatically check basic minimum requirements before posting degree

Environment: PeopleSoft Student Administration 8.0, Oracle 8i, Windows 2000 and Unix.

.imited Brands **02/2005 to 03/2005**
Reynoldsburg, OH
mplementation of PeopleSoft 8.8 HCM

- Worked with Self Service (ESS and MSS) modules and solved different problems.
- Worked with Bundles and Compare reports.
- Opened GSC cases with delivered problems in SS module after applying the bundles
- Involved in applying bundles and Tax updates.
- Migration of objects between different databases.
- Modified People code as per the requirement.
- Customized delivered pages and components to provide managers instant access to critical information about their open job requisitions and applicants specific data for analysis.
- Created a component to see the brief summary of applicant's data based on Manager ID.
- Created several message boxes to give a brief idea regarding to the Job opportunities to the applicants during their resume posting through online.

Environment: PeopleSoft HCM 8.8 HCM, People Tools 8.44, SQR, Windows and Oracle 8.x

HCL (Circuit City), Charlotte, NC. **08/2004 to 01/2005**
Development of Technical Specifications and SQRs

- Involved with user interaction to gather the requirements and prepared the Technical Design Documents (TDDs) for development of interfaces and SQRs.
- Developed TDDs for the following SQR repots based on the Business Requirements Documents provided by the client and also developed new SQRs from scratch to meet the requirements.
  - Average Earnings Calculator.
  - Circuit City Payroll Conversion Employee Information to Other AS/400 Systems
  - Interface from PeopleSoft to Alameda Corporation of Employee Payroll Data
  - ESP Exclusion File Interface from PeopleSoft to Dakota
  - ESP/TCS Employee Maintenance File Interface from PeopleSoft to ESP/TCS System
  - Calculation of Circuit City Bonus Overtime Repot

Environment: People soft HCM (HR, PayRoll and Benefits), Windows and Oracle 8.x

ADP, Louisville, KY **05/ 2004 to 07/2004**
Development of Interfaces and SQRs

- Worked with SQRs and Interfaces in HR, Payroll, Benefits and Benefit Administration to generate the output file in user specified format. Developed Interfaces from scratch to generate data files with the specified data.
- Generated an interface to report every 20th employee elections who has a family status change Based on User input From - Thru Date.
- Created a data file from Enterprise to SLC Employee Communications system (ECS) using the SLC ECS standard file layout for the printing of Enrollment worksheets.
- Generated an outbound interface SQR which will extract the employee open benefit enrollment data from Enterprise V3 to SLC for production of enrollment worksheets. This SQR will get the open benefit enrollment data from custom tables and writes the data into the output file in an ASCII format with record length of 500 characters.
- Created a data file from Enterprise to SLC for production of FSA Ongoing File for Del Monte

Environment: Enterprise HRMS V3, SQR, Rapid SQL, MS Excel, Oracle, UNIX and Windows 2000

Senior People Soft HRMS Consultant **01/2004 to**
04/2004
Deloitte (Textron, RI)

Project: Conversion and Implementation of PeopleSoft 8.8 (HR, PR, Benefits, and eModules)

- Involved in all phases of data conversion from legacy to People soft HCM 8.8.
- Developed SQRs from scratch to check the Referential Integrity and null values in People soft 8.8 tables after data conversion from Legacy to New People soft System.
- Generated tab delimited text files from legacy system.
- Used Convoy/DM for data migration from legacy to People soft. Created and generated Interfaces, Processes, mappings and User defined Functions in Convoy/DM to migrate data from legacy to People soft system.
- Generated and executed SQRs in Convoy/DM to transfer data from legacy to People soft system.
- Written people code to send emails for future terminated employees.
- Involved with functional team during data migration to gather specifications.
- Developed Conversion templates based on the technical specifications.
- Worked with People soft HCM (HR, Payroll, Benefits and Time & Labor) tables during data Conversion.

Environment: PeopleSoft HCM 8.8, Kronos, Convoy/DM, SQR, DB2, Windows, 8.x and Unix

Lexington, KY (IBM-Lexmark) **01/2003 – 12/2003**
Implementation of People soft HCM 8.3 (HR, Payroll, Benefits, Self Service and eModules)

Involved in Implementation of People soft HCM. The application maintains company's USA functionality and supports Canada, France's and the Europe countries functionality. Worked on

- Customization of delivered People code as per user requirement and debugging the People code.
- Written people code to send emails based on the language.
- Extensively worked Manager Self Service, Employee Self Service, and Faculty Self Service and Applicant Self Service modules extensively.
- Interacted extensively with functional users, gathered and analyzed requirements delivered by them.
- Interacted extensively with people soft customer support and applied patched delivered by them.
- Worked with multilingual languages and worked with transnational issues.
- Interaction with end users and gathered requirements and prepared technical specifications for technical team.
- Generated a process to create interface between Benefits and Time &Labor which compares Employee's leaves recorded in Time & Labor against the allowed leaves.
- Involved in multilingual operations and developed new People code routines to handle the user navigation of pages as per their geographical area.
- Extensively worked with eRecruit module and solved number of day to day problems encountered by the users in USA, France and UK.
- Migration of Project between different Databases and Data conversion.
- Providing security for the specified users for specified objects as per the requirement.
- Created GSC cases for People soft delivered problems and solved the problems with the help of People soft Customer Service support center.
- Interaction with People soft Customer Support Center to resolve the number of delivered errors in People soft Application.

Environment: People soft 8.x, SQR, Application Engine, Windows, Oracle 8.x and SQL Server

Asplundh Tree Expert Co, PA **06/2000 - 12/2002**

pgrade and Implementation (HR, PR, Benefits and Time & Labor)

- Involved in the implementation and Upgrading People soft Human Resource Management (HRMS) from 7.5 to People soft 8.x. Modules implemented were HR, Payroll, Benefits and Time & Labor
- Maintain and trouble shoot People soft database, Programming in SQL, SQR and User support
- Worked with the tables to define Payroll process and Payroll Taxes windows to setup Payroll information and maintain the information as it changes in the Payroll Data Panels
- Extensively used Import Manager to import data from flat files to People soft tables
- Submitted processes to the Process Scheduler to run daily tasks at a specific time to run process recursively at a specific interval
- Created custom designs and developed process flow and generating reports using SQR for employee works for multiple locations, punch time reports, summary reports for daily, weekly and monthly reports.
- Transferred data from legacy system. Legacy system was IBM mainframe with DB2 database.
- Participated in migrating the developed objects from the development environment to the test as well as production environment

Environment: People soft HRMS 7.5 / 8.x (HR, PR, Benefits, Time &Labor), SQR, DB2, SQL Server, Test Director, Unix and Windows NT.

VB CONSULTING

Valaurie Bridges Lee

SUMMARY OF QUALIFICATIONS

- CEO and founder of VB Consulting, highly regarded as the expert in Academic Advisement
- Former IBM, PeopleSoft and Waste Management employee
- Entrepreneur and visionary

WORK EXPERIENCE

PeopleSoft Academic Advisement Consultant - (March 2011- March 2013)
Assisted in the Go Live effort of the Advisement module (v9.0) for ***University of Central Florida (Graduate School)*** –Orlando, Florida

- Conducted fit gap analysis work sessions and developed functional specs for modifications
- Developed project plan for the Advisement implementation
- Provided post production resources to the Graduate School

PeopleSoft Academic Advisement Lead - (June 2010- March 2011)
Assisted in the Go Live effort of the Advisement module (v9.0) for ***Grant MacEwan*** –Edmonton, Canada

- Conducted fit gap analysis work sessions and developed functional specs for modifications
- Configured & tested all majors/certificates – From current catalog to 4 years back
- Analyzed, configured & tested pre-requisites and anti-requisites (1,000+)

PeopleSoft Academic Advisement Lead - (October 2008- May 2010)
Assisted in the Go Live effort of the Advisement module (v9.0) for ***Syracuse University***

- Configured & tested Arts & Sciences, Graduate Engineering & Management Plans
- Conducted fit gap analysis work sessions and provided project plan for implementation
- Trained AA team on Academic Advisement setup & maintenance

PeopleSoft Academic Advisement Consultant - (May 2008- October 2009)
Assisted in the upgrade of the Advisement module (v9.0) for ***University of Mass-Amherst***

- Conducted fit gap analysis work sessions for Enrollment Backpack
- Recommended updates for audits (over 100)- transitioning from 8.9 to 9.0
- Assisted with debugging 9.0

PeopleSoft Academic Advisement Consultant - (May 2007- March 2008)
Assisted in the Go Live effort of the Advisement module (v9.0) for ***Indiana University***
<Early Success Program 9.0 >

- Served as liaison to Oracle/PeopleSoft to communicate bugs/issues with 9.0 functionality
- Reviewed existing customizations to determine whether they could be eliminated or simplified
- Conducted fit gap analysis work sessions
- Participated in system integration testing

PeopleSoft Academic Advisement Consultant - (February- September 2008)
Compared Advisement & DARwin 3.57 (v9.0) for ***Miami University***

- Attended DARwin 3.57 Training, Encoding Training, and Transfer Articulation Training
- Provided deliverable outlining differences between the two systems to assist with Marketing efforts

PeopleSoft Academic Advisement Consultant - (February 2007- May 2007)
Assisted in the Go Live effort of the Advisement module (v8.0) for ***Stanford University***

VB
CONSULTING

- Advised staff on communications plan to achieve greater support, university-wide
- Conducted readiness assessment sessions
- Led system integration and regression testing

PeopleSoft Academic Advisement Consultant - (June 2006-October 2006)
Assisted in the implementation of the Advisement module (v8.9) for ***NC State University***

- Led prototyping and fit/gap sessions
- Suggested alternatives for setup of difficult plans
- Developed a strategy for the AA implementation
- Built all minors and shells for 40 undergraduate and graduate majors

PeopleSoft Academic Advisement Lead/ Student Records Support-(Feb 2004-June 2006)
Implemented the Advisement module (v8.0) for ***Westwood Colleges*** on-line campus

- Functioned as project manager for Advisement initiative
- Configured and tested all on-line plans for three catalog years
- Created scheduling report utilizing the analysis database tables
- Provided post production support for Student Services (Records & Admissions)

PeopleSoft Academic Advisement Lead-(June 2003-March 2006)
Assisted in the implementation and deployment of the Advisement (v8.0) module for ***University of Massachusetts*** (3 separate campuses- Boston, Lowell, Dartmouth)

- Functioned as project manager for Academic Advisement
- Conducted business process re-engineering sessions in addition to fit-gap analysis sessions
- Assisted with the building and testing of over 350 undergraduate plans
- Assisted with Post Production Support and the Transfer Credit clean-up effort

PeopleSoft Academic Advisement Consultant- (January 2004- May 2004)
Implemented the rollout & "Go-Live" of the first phase of the Academic Advisement module (v8.0) for ***University of California Santa Cruz***.

- Configured and tested General Education Requirements and Phase I pilot plans
- Provided Advisement best practices regarding standards and maintaining plans
- Created test scripts for testing and job aids for post production

PeopleSoft Academic Advisement Lead- (August 2002- October 2003)
Implemented and deployed the Advisement module for ***Northern Arizona University*** (v8.0)

- Facilitated daily fit-gap and business process re-engineering sessions
- Provided work plan and detailed tasks of assignments needed for "Go Live"
- Built and tested over 200 undergraduate plans
- Provided end user training documentation

PeopleSoft Academic Advisement Lead - (March 2002-May 2003)
Implemented and deployed the Advisement module (v 7.6 HTML access) for ***University of Massachusetts- Amherst*** (12 month implementation)

- Built over 220 plans for 8 undergraduate colleges back to 1986
- Converted (manually) historical & student exception data from DARS degree audit system
- Coordinated the phased deployment of General Education, Diversity, College, and Plan requirements
- Created training documentation and trained staff on maintenance of the system

PeopleSoft Academic Advisement/Student Records Consultant (August 2002-8 weeks)
Assisted in the setup of the Advisement module (v8.0) for ***St. Petersburg Junior College***.

- Functioned in an advisory role to aid with the setup of Academic Structure, Student Records, and Advisement

- Resolved errors/issues related to Dynamic Dating, Transcript Setup, Catalog setup, Pre-requisites, Milestones, Student Program/Plan, and Advisement
- Built & tested over 80 plans for Academic Advisement back to 1998

PeopleSoft Academic Advisement Consultant- (March 2002)
Implemented the setup & "Go-Live" of the General Education Requirements (v7.6 HTML access) for ***Bryn Mawr College***

- Built the University General Education Requirements for undergraduate students
- Built all plans for the Graduate School of Social Work
- Led fit gap analysis sessions for the Undergraduate College and the School of Social Work

PeopleSoft Academic Advisement Lead- (August 2001-March 2002)
Implemented the setup & "Go-Live" of the Academic Advisement module (v7.6) for ***Northwestern University***

- Built 4 years of historical data/degree requirements in Academic Advisement.
- Worked closely with the assistant registrar and two additional staff members to ensure the success of the "phased implementation approach."
- Provided training for staff unfamiliar w/ the PeopleSoft product
- Presented different setup options for coding complex requirements

PeopleSoft Academic Advisement Lead- (Sept 2000-July 2001)
Implemented the setup & "Go-Live" of the Academic Advisement module (v7.6) for ***University of Louisville***

- Developed a rapid methodology for implementing Academic Advisement in 9 months
- Built and tested over 145 plans
- Functioned as the liaison between the automated transfer credit module and Academic Advisement
- Trained faculty and advisors on the Academic Advisement module
- Participated in the Early Success Program for PeopleSoft 8

PeopleSoft Academic Structure/Student Records Lead (March 2000-June 2000)
Implemented the setup of the Student Records module (v7.6) in 11 weeks for ***Southwestern Illinois Community College***

- Facilitated all fit-gap analysis sessions
- Performed data conversion from the client's legacy system to PeopleSoft
- Prepared and presented recommendations to client management which included procedural improvements and guidelines for best practices
- Utilized PeopleSoft partner Rapid Methodology

PeopleSoft Academic Advisement Lead (Feb 2000)
Implemented the setup of the Advisement module (v7.6) in 4 weeks for ***University of St. Thomas***

- Developed and utilized Rapid Methodology for Academic Advisement
- Built and tested over 70 plans in 4 weeks
- Developed test scripts and job aids

PeopleSoft Student Records/Academic Advisement Lead for a 4 college consortium (August 1999-Feb 2000)
Implemented the setup of the Student Records module in 6 months for ***AURORA***- a Mid-West College consortium (Four Schools)

- Facilitated fit-gap analysis sessions for all four colleges simultaneously
- Conducted upgrade testing in Student Records from v7.5 to v7.6
- Built and tested 60+ Academic Advisement plans for pilot school
- Facilitated data mapping and conversion workshops with functional and technical team
- Coordinated all resources and efforts for the testing of all delivered and customized processes, reports, panels and tables

VB
CONSULTING

PeopleSoft Student Records Consultant (June-July 1999)
Assisted with the implementation of the Student Records module for ***Maryland Institute College of Art.***

- Primary duties included data mapping from the CMDS legacy system
- Trained key users on the major business processes in Admissions and Student Records
- Resolved issues and assisted with the conversion clean up effort

PeopleSoft Academic Advisement Consultant (May 1999)
Selected by two colleges (***Frederick Community College*** *and* ***UMass-Amherst***) to conduct Academic Advisement workshops for the staff

- Presented the colleges with an overview and Keys to Implementing Academic Advisement
- Built a shell of the General Education Requirements and one plan

PeopleSoft Student Records Lead for Rapid Implementation (Oct 1998-April 1999)
Selected by IBM to assist in the development of the PeopleSoft Rapid Implementation methodology for Mid-Market colleges

- Determined the scope for all Rapid Methodology Engagements
- Developed a prototype in the area of Student Records and Academic Advisement for use at Mid-Market projects
- Created all templates and test scripts for Academic Structure, Student Records, and Academic Advisement used for implementing the Rapid Methodology

ACADEMIC ADVISEMENT WORKSHOPS CONDUCTED WITH:

Butler University (May-June 2010)
University of St. Thomas (Oct 2009- Dec 2009) 9.0 Upgrade
Simon Fraser University (June 2008 & May 2009)
Los Rios Community College (Feb 2008- 2009)
City Colleges of Chicago (Oct 2003-Feb 2004 & May-August 2009)
Texas Christian University (Sept 2008)-9.0 Upgrade
Heartland Community College (June 2004 & Feb 2006 & Feb 2008)
Mira Costa Community College (May –June 2006)
Illinois Community College (January 2006)
Metropolitan Community College- Kansas City (March 2005)
Grand Rapids Community College (June 2004)
LDS Business College (June 2003)
University of Florida Gainesville (Sept 2004- Dec 2004)

VB CONSULTING

Jessica Owens

SUMMARY

- Involved in all phases of Campus Solutions Student Records and Academic Advisement life cycle: including fit/gap analysis, configuration and setup, testing, training and post production support
- Ability to work in a fast paced environment with timelines and changing deadlines
- Exceptional leadership, communication, interpersonal and organizational skills

WORK EXPERIENCE

University of Central Florida (Graduate School) –Orlando, Florida
PeopleSoft Academic Advisement Lead Consultant on Site- (March 2011- present)

- Conducted fit gap analysis work sessions and developing functional specs for modifications
- Developed project plan for the Advisement implementation
- Completed Configuration of 380 graduate programs and certificates for six catalog years of data
- Lead testing and troubleshooting efforts of configured data
- Lead student exception processing of data from DARS Legacy system over 8,000 exceptions posted.
- Developed End-User training documentation (Student and Staff)
- Lead Kick-Off (Go-Live) efforts for UCF College of Graduate Studies
- Lead successful transitional support phase for UCF College of Graduate Studies
- Provided post production support and training for new staff

Moody Bible College –Chicago, Illinois
PeopleSoft Academic Advisement Lead - (June 2013- present)

- Conducted fit gap analysis work sessions
- Developed functional specifications for modifications
- Configured and tested 100+ majors going back to 2010
- Trained faculty and staff on using Academic Advisement

Grant MacEwan –Edmonton, Canada
PeopleSoft Academic Advisement Lead - (June 2010- March 2011)

- Conducted fit gap analysis work sessions
- Developed functional specifications for modifications
- Configured & tested approx.. 100 majors/certificates for five years of catalog data
- Analyzed, configured & tested pre-requisites and anti-requisites (1,000+)
- Facilitated testing and troubleshooting efforts of configured data

May 2008-January 2011 VB Consulting- Subcontractor, Assisted with following accounts:

Benedictine College- Lisle, Illinois

- Configured over 20 Graduate plans and 42 Undergraduate Plans
- Developed substantiating configuration documentation
- Maintained project plan of updates and issues

University of St. Thomas– Saint Paul, Minnesota

- Configured over 5 Graduate plans and 20 Undergraduate Plans

- Developed substantiating configuration documentation
- Created test scenarios in demo database

Syracuse University– Syracuse, New York

- Assisted with the configuration of over 30 Graduate plans
- Developed substantiating configuration documentation
- Created test scenarios in demo database
- Maintained project plan of updates and issues

Feb 2008- Dec 2010 Los Rios Community College-Sacramento, CA

Academic Advisement Module Lead

- Served as lead technician in the implementation and maintenance of the Degree Audit/Academic Advisement module within PeopleSoft for Cosumnes River College.
- Led Academic Advisement Post Production support effort
- Worked closely with the IT department and district to coordinate the testing and training effort of the Academic Advisement module
- Assisted with the development and deployment of Academic Advisement training for all four colleges in the Los Rios consortium
- Facilitated Public Relations campaign to increase awareness of new Academic Advisement module
- Functioned as lead for coding student exceptions for Cosumnes College

Feb 2008- Dec 2010 Cosumnes River College – Sacramento, CA

Degree Evaluator

- Worked closely with special student populations including provisionally/conditionally admitted students, probationary students, transfer students, and freshmen
- Informed students of graduation requirements
- Assisted students in developing academic goals, career goals, and course scheduling
- Communicated with students, staff, and other individuals to disseminate or explain information regarding graduation and admission requirements.
- Assisted students in registration and admission procedures
- Evaluated student transcripts for credit acceptability, admissions to university and graduation

Jan 2004- Dec 2007- California State University, Sacramento – Sacramento, CA

Veteran's Affairs Counselor

- Assisted Veteran students with enrollment and certification to the VA regional processing office.
- Updated student information in SIS+ as well as PeopleSoft.
- Input student data into VAONCE and update "Vet Database" as needed.
- Resolved and responded to inquiries from veterans, active duty military and the general public regarding general academics, VA educational benefits and programs.
- Served as first point of contact for students and other staff entering the VA office.

EDUCATION

B.A in Sociology (Planning & Development) – **California State University, Sacramento**-Sacramento, CA

NOTABLE SKILLS

Oracle/PeopleSoft: Admissions, Academic Structure, Student Records, Academic Advisement

Oracle Partner Consultant Skills Training-Certified

VB CONSULTING

Erin Bettis

SUMMARY OF QUALIFICATIONS

- 7+ years experience working as an Admissions and Records Evaluator assisting students in
- completing degree or certificate objectives
- Knowledge of PeopleSoft and the Academic Advisement/degree audit module/DARS/Red Lantern Degree Audit systems
- Skilled in using MS Office software applications and familiar with various Internet browsers such as IE Explorer, Chrome, Firefox, Safari. Also familiar with an online presentation application called Prezi , and Camtasia.
- Ability to relate to people on various levels, excellent communication skills, detail oriented, professional, and creative
- Oracle Partner Consultant Skills Training-Certified

SUMMARY OF PROJECTS

Academic Advisement/Student Exceptions Lead

University of Central Florida Graduate Studies Department

- Managing the posting of over 9,000 student exceptions from the legacy DARS system
- Supervised and trained a team of four student exception coders
- Facilitated extensive testing and troubleshooting of graduate programs and certifications
- Created a user friendly training manual for posting student exceptions

Academic Advisement Consultant

Walla Walla University

- Researched and assisted with Academic Advisement configuration
- Analyzed conversion from legacy system, Degree Works to Academic Advisement for Walla Walla University to verify accurate set up
- Facilitated Data Verification of Degree Audits in DegreeWorks vs. Academic Advisement
- Provided student exception training and documentation

Academic Advisement Consultant

St. Petersburg College

- Developed presentation for 9.0 fit/gap analysis
- Updated Advisement for common uniform standard
- Provided recommendations for complex requirement setup
- Queried students and provided test scenarios for 4 catalogs

Academic Advisement Consultant

Catholic University of America

- Researched and assisted with Academic Advisement configuration and tested of over 100 majors
- Performed quality assurance tests on all majors/minors/second major combinations setup

OTHER HIGHER ED WORK EXPERIENCE

Admissions and Records Evaluator – (2005-2012)

American River College

- Maintained PeopleSoft Academic Advisement daily to check for completion and accuracy of graduation requirements.

VB
CONSULTING

- Researched and analyzed complex policies, regulations, procedures and guidelines related to transfer credits and graduation.
- Managed and ordered diplomas and certificates for American River College graduates each semester
- Lead for American River College Academic Advisement implementation
    - Analyzed, built and tested degree and certificate programs using Academic Advisement.
    - Updated and interpreted changes to the catalog relative to the degree audit system.
    - Researched and resolved errors in degree audit program formatting.
    - Trained coworkers, faculty and students on how to use the degree audit system

VB
CONSULTING

Tram-Anh Pham

SUMMARY OF QUALIFICATIONS

- Involved in all phases of Academic Advisement life cycle: including fit/gap analysis, configuration and setup, testing, training and post production support
- Ability to work in a fast paced environment with timelines and changing deadlines
- Extremely organized and exceptional attention to detail

SUMMARY OF PROJECTS

VB Consulting- *(August 2012-Present)* **Assisted with following accounts:**

PeopleSoft Academic Advisement Consultant on Site- (August 2012- Present)

University of Central Florida (Graduate School) –Orlando, Florida

- Conducted testing and troubleshooting of configured data
- Led student exception processing of data from DARS Legacy system over 8,000 exceptions posted.
- Assisted with End-User training documentation (Student and Staff)
- Assisted with Kick-Off (Go-Live) efforts for UCF College of Graduate Studies
- Supported successful transitional support phase for UCF College of Graduate Studies

PeopleSoft Academic Advisement Consultant- (February 2013- March 2013)

University of Puget Sound – Tacoma, Washington

- Tested approx. 100 programs and plans setup
- Analyzed and tested data after migration to production environment
- Assisted in troubleshooting efforts of configured data from CASCADE legacy system
- Assisted in end user training documentation

Au Chau Fashion & Cosmetics-Calvin Klein Brand Manager – (March 2010- December 2011)

Work Experience Abroad- Ho Chi Minh City, Vietnam

- Rebuilt and reorganized operation structure of 20 boutiques in Vietnam; including hiring staff, setting sales targets, training staff, etc.
- Calculated budget and buy pre-launch merchandise for upcoming seasons

Brand Manager

Maison Joint Stock Company- Versace, Jimmy Choo, and Mango

- Motivated staff to meet or exceed sales targets, coordinated marketing plans, lead staff training and informational product knowledge sessions of international fashion brands in Vietnam
- Accurately reported financial and sales details to corporate offices
- Managed suppliers for marketing events, lead IT support, organized successful opening launches
- Created sales goals and incentive programs to increase sales

Realtor/Training Specialist- (February 2005-June 2006-)

Metro Area Realty- Orlando, Florida

- Lead sales associates: Presented up to date state's and company's policies to team; encourage sales with different strategies
- Utilized MLS (Multiple Listing System) to analyze market home inventories, compare pricing, and compare specific home features to determine competitive pricing, then present to prospective clients
- Made recommendations to sellers/buyers regarding investing in certain home improvements to get the best return for their money

VB
CONSULTING

District Environmentalist/Designer – (September 2001-March 2004)

Georgia Department of Transportation - Chamblee, Georgia

- Designed urban roadway systems: work with other engineers, CAD specialists, Right-of-Way specialists, and environmentalists to design urban roadway projects
- Responsible for the approval of the environmental documents for the preliminary design process within the Department and from the consultants
- Attended project meetings to determine and answer questions regarding potential environmental impacts of each proposed project
- Operated communications with the FHWA (Federal Highway Administration) to avoid and resolve environmental impacts to projects

EDUCATION

B.S in Civil Engineering Technology- Southern Polytechnic State University- Marietta, Georgia

NOTABLE SKILLS

Oracle/PeopleSoft: Admissions, Academic Structure, Student Records, Academic Advisement
Oracle Partner Consultant Skills Training-Certified

VB
CONSULTING

Steffen Deonanan

SUMMARY OF QUALIFICATIONS

- Involved in all phases of Academic Advisement life cycle: including fit/gap analysis, configuration and setup, testing, training and post production support
- Ability to work in a fast paced environment with timelines and changing deadlines
- Exceptional communication, interpersonal and organizational skills

---

WORK EXPERIENCE

Advisement Consultant- Post Production
St.Petersburg College

- Troubleshooting outstanding post production issues
- Providing training documentation for employees
- Providing recommendations regarding best practices
- Helped configure over 200 Undergraduate plans
- Developed substantiating configuration documentation
- Maintained project plan of updates and issues

Trainer and Tester
University of Central Florida Graduate Studies Department

- Helped facilitate change management for Graduate School
- Created press releases for release of GPS Advising system
- Coordinated training for faculty and staff introducing GPS system
- Created camtasia videos for faculty and staff
- Assisted team with testing Advisement reports

VB Consulting- (January 2012-present)
Catholic University of America

- Configured over 100 Undergraduate plans
- Maintained project plan of updates and issues

EDUCATION

B.S. in Psychology – **Kennesaw State University, Kennesaw GA**
B.S. in Psychology – **Oxford College, Oxford, GA**
J. D. Candidate – **GSU College of Law, Atlanta, GA**

NOTABLE SKILLS

Oracle/PeopleSoft: Admissions, Academic Structure, Student Records, Academic Advisement

VB CONSULTING

Leigh Hopf

SUMMARY OF QUALIFICATIONS

- Over 10 years of experience in designing, implementing, analyzing, and coordinating projects needed for data driven decision making.
- Strong leader in performance improvement methodology to increase efficiencies.
- Excellence in working in a team environment where multiple tasks and/or projects are simultaneously managed and accomplished.

WORK EXPERIENCE

PeopleSoft Curriculum Management Lead
Director of Institutional Effectiveness
Managed the update and retooling of the PeopleSoft Student Records Module-Curriculum Management for ***St. Petersburg College*** –St. Petersburg, FL

- Lead the initiative of a college wide retooling of the PeopleSoft Course Catalog and Degree Audits
- Resolved and researched problems/issues and developed best practices with the implementation of an updated course catalog and Academic Advisement reports
- Lead discussions and analysis with academic stakeholders to ensure quality control of the course catalog and degree audits
- Technical Curriculum Services Representative on College-Wide Committees as it relates to modifications and new developments in PeopleSoft
- Project management of the design and implementation of a new web-based curriculum software product and workflows
- Proficient team member who helped successfully roll out a cross-divisional business intelligence system in-house built system in less than one year from project start up
- Provided custom data analysis support to Board of Trustees, President, and other senior leaders

Director of Baccalaureate Program Support Services
Lead for PeopleSoft 3C Testing of Upgrades and Modifications for ***St. Petersburg College***

- Provided mid-level support to ensure initiatives were enhanced and supported through clear communication and streamlined processes
- Liaison to the College community concerning all baccalaureate institutional effectiveness outcomes for all PeopleSoft student database activities
- Manage PeopleSoft 3C's Upgrades and Modifications as they relate to admissions and advising and coordinated testing
- Troubleshoot and manage the 3C and degree audits operations for 24 BS and BAS degree programs
- Lead point person with Central Records to troubleshoot transfer credit and admissions issues rent and track current and prospective admissions numbers within PeopleSoft
- Project manager that helped to establish 12 new baccalaureate programs from concept through to start-up which included set up of programs in PeopleSoft set up tables, curriculum development, advising materials, initial student enrollment, and specialized accreditation requirements

Coordinator of Baccalaureate Program Research and Reports
Baccalaureate Representative on the PeopleSoft Upgrade Team for ***St. Petersburg College***

- Developed an integrated system to collect, manage, analyze, and report program data to respond to

state, legislative, & other stakeholders
- Coordinate all set up and management of the Baccalaureate PeopleSoft 3C System
- Served as the Baccalaureate representative on the PeopleSoft Upgrade Team, including testing all related queries, 3C set-up and functionality, and new program set-up
- Collaborated with stakeholders to develop survey and other quality control documents to monitor and collect data needed for program improvement initiatives.

TECHNOLOGY, SOFTWARE, & TRAINING AND PROFESSIONAL AFFILIATIONS

- PeopleSoft Student Data System Functional User: Academic Advising, Curriculum, & Queries
- PeopleSoft Student Data System Set Up and Testing: 3C, Course Catalog, Degree Audit, Program/Plan, Queries
- Crystal Reports
- Lean Six Sigma Expert Certificate
- SPSS Data Analysis
- SQL Programming (Basic Programming Skills)
- Florida Associate of Institutional Research (Fair) Presenter 2011-*The Evolution of the Comprehensive Academic Program Review*
- Florida Associate of Institutional Research (Fair) Presenter 2012-*Leveraging Technology to Increase Student Response Rates*
- Florida Associate of Institutional Research (Fair) Presenter 2012-*Using Business Intelligence to Improve Student Success*

EDUCATION

The Ohio State University – Columbus, OH
Masters in Educational Policy and Leadership Emphasis in Quantitative Research, Evaluation, and Measurement in Education (2002-Summa Cum Laude)

University of Tennessee– Knoxville, TN
Bachelor of Science in Psychology (2000-Summa Cum Laude)

PRJ Consulting Inc.
PeopleSoft Solutions Advisors

Cathy Schmeltz
MANAGING CONSULTANT

PROFESSIONAL SUMMARY

Cathy is a Managing Consultant with over seventeen years of software implementation, training and maintenance experience. Over twelve years have been spent working with PeopleSoft financials modules. In addition to her software skills, Cathy has also received training as a business and personal coach from iPEC (Institute for Professional Excellence in Coaching). This training has enhanced her already strong communication and problem solving skills. Cathy works very closely with the end users to ensure that their needs are understood and that they know how to efficiently utilize the system being implemented. Additionally, she is an invaluable member of the testing and troubleshooting teams.

Cathy has worked in several industries including Health Care, State Government, Insurance, Retail, Entertainment, Automotive Services, Advertising, and Consumer Electronics.

SKILL SUMMARY

Skill Group	Specific Skills
Project Management	Co Project Management
Business and Process	Business Process Design, Requirements Gathering and Analysis, Fit/Gap Analysis
ERP/Financial Packages	PeopleSoft v 7.5-9.1 including Accounts Payable, General Ledger, Asset Management, Purchasing, Projects, and Billing Dun and Bradstreet, Eagle, Proprietary Systems
Assessments	Business Case Justification including Roadmap documentation
Implementations	Financial Systems, ERP, Warehouse Management, Proprietary Systems

PROFESSIONAL EXPERIENCE

Training / Training Coordinator – Health Care

Responsible for identifying client training needs and tracking development of UPK materials.

- Coordinated with implementation team to identify training needs for end users, back office and UPK development.
- Identified training content for end users and reviewed related materials.
- Created training plan.
- Tracked development of UPK materials.

Training / Change Management Lead – Health Care

Responsible for creation and implementation of training and communication plans.

- Coordinated with implementation team to create training presentations and training guides.
- Responsible for final training documents.
- Organized training delivery and participated in delivery.
- Created and distributed communication materials.
- Coordinated development and deployment of client specific UPK materials.

Team Lead – Health Care

Responsible for payroll integration changes associated with financial implementation.

- Identified changes to be made to the eleven programs impacted by the financial implementation.
- Communicated needed changes to developers and users.
- Planned, coordinated and participated in unit and integration testing.
- Updated training materials for users.
- Provided post-implementation support.

Team Lead – Health Care

Responsible for PeopleSoft implementation to 9.1 for Accounts Payable and General Ledger.

- Organized meetings with users to gather business requirements.
- Conducted fit gap analysis, identified and resolved gaps.
- Designed future business process flows.
- Configured modules based on business requirements and design documents.
- Coordinated conversion of legacy data and verified data accuracy.
- Planned, coordinated and participated in unit, system and integration testing.
- Resolved issues as part of production support

Consultant – Health Care

Responsible for PeopleSoft upgrade to 9.1 from 8.8 of Accounts Payable, General Ledger and Asset Management.

- Met with financial users to document business processes and gather business requirements.
- Conducted knowledge transfer sessions to highlight new features of PeopleSoft and recommend additional functionality to improve business processes.
- Created fit gap analysis to identify business process reengineering.
- Configured modules based on business requirements.

Consultant – State Government

Responsible for development and delivery of PeopleSoft 8.9 Financial training to State employees. Additionally, provided consulting assistance with testing, business process development and go-live readiness.

- Developed Asset Management training materials and job aids.
- Contributed to Accounts Payable and General Ledger training materials and job aids.
- Delivered full-day training on Asset Management, Accounts Payable and General Ledger.
- Participated in system testing and issue resolution.
- Worked with Auditors office to understand current system processes to develop PeopleSoft business procedures.
- Interviewed key agencies to determine go-live readiness and areas of concern. Findings were documented and distributed to key decision makers.

Team Lead – State Government

Assumed responsibility for PeopleSoft 8.9 implementation of General Ledger, Asset Management and limited Accounts Receivable after departure of original Team Lead.

- Participated in creation of training materials and classroom training.
- Created test scripts and participated in system testing.
- Converted General Ledger and Asset data and reconciled to Book of Record.
- Documented procedures.
- Provided post-implementation support.

Consultant – Insurance Industry

- Responsible for analyzing current financial systems and processes to determine if an Enterprise Financial System would be worthwhile to implement.
- Interviewed key financial stakeholders to determine user pains and improvement opportunities with current financial systems. Findings were documented and distributed.
- Developed high-level business case to support recommendation for client to progress with selection and implementation of an enterprise financial system.
- Created roadmap document outlining findings, recommendations and implementation timeline.

Team Lead – Retail Industry

Responsible for PeopleSoft upgrade to 8.4 from 7.5 of Accounts Payable, General Ledger and Asset Management modules utilizing a re-implementation approach.

- Organized meetings with users to gather business requirements.
- Conducted fit gap analysis to identify business process reengineering.
- Configured modules based on business requirements.
- Coordinated conversion of legacy data and verified data accuracy.
- Planned, coordinated and participated in unit, system and integration testing.
- Developed and delivered training for end users.
- Provided post-implementation support.

Co Project Manager – Entertainment Industry

Assisted with project management for PeopleSoft 8.3 implementation of Payroll and Time and Labor modules.

- Assisted with development and execution of implementation plan.
- Tracked project progress to implementation plan and made adjustments as required.
- Coordinated parallel testing and compiled results.
- Conducted status meetings and created status reports.

Team Lead – Automotive Services Industry

Responsible for PeopleSoft 8 implementation of Accounts Payable and Cash Management modules.

- Gathered business requirements, conducted fit gap analysis, identified and resolved gaps.
- Configured modules based on business requirements.
- Planned, coordinated and participated in unit, system and integration testing.
- Developed training materials.
- Coordinated and delivered end user training.
- Provided post-implementation support.

Team Lead – Retail Industry

Responsible for PeopleSoft 8 implementation of Accounts Payable and Purchasing modules.

- Coordinated focus groups for set-up of Purchasing and Accounts Payable.
- Conducted fit gap analysis to identify business process reengineering.
- Coordinated conference room pilot and user acceptance testing.
- Assisted in end user training.
- Provided post-implementation support.

Business Unit Team Lead – Advertising Industry

Lead four-member project team through PeopleSoft 7.5 implementation that included Projects, General Ledger, Accounts Payable, Purchasing, and Billing modules.

- Acted as a liaison between users, local implementation team and project management team.
- Conducted fit gap analysis, identified functional gaps and developed and communicated resolutions.
- Coordinated conversion of legacy data and verified data accuracy.

- Coordinated parallel processing of pilot data to ensure system functionality and provide training and "hands-on" experience to user group.
- Researched problems and proposed solutions.
- Identified and assisted with resolution of business practice issues.

On-Site Production Support – Advertising Industry

Provided on-site production support for PeopleSoft 7.5 Billing and Project modules.

- Researched problems reported by users and proposed solutions to fix immediate problem and to prevent problem reoccurrence.
- Communicated issues to technical team and project management.
- Tested problem resolutions.
- Developed and delivered user training.
- Created system documentation.

Testing Team Member – Advertising Industry

Tested customized PeopleSoft 7.5 software to confirm functionality requirements for Projects, Billing, Accounts Payable, Purchasing and General Ledger modules.

- Interviewed users to determine unique testing conditions for each Business Unit.
- Developed and executed test scripts based on interviews.
- Identified system problems and communicated issues to development team.

Implementation Team Member – Consumer Electronics Industry

Full implementation and maintenance of General Ledger module for all Business Units in North America.

- Interviewed future system users to assess system needs.
- Participated in system design.
- Researched problems, assisted with resolution, and implemented solutions.
- Developed training materials.
- Delivered training to end users in multiple locations and countries.
- Managed employees whose responsibilities were the maintenance of the system.

Implementation Team Member – Consumer Electronics Industry

Responsible for financial integrity of inventory during Warehouse Management System implementation (Eagle packaged software).

- Contributed to system design.
- Performed user testing.
- Identified and contributed to resolution of issues that arose during testing and implementation.
- Resolved inventory problems after implementation.

Implementation Team Member – Consumer Electronics Industry

Member of implementation team to automate the ordering, shipping and financial tracking of product movement from one country to another (US, Canada, Mexico).

- Analyzed and documented existing processes and contributed to system design.
- Conducted user testing.
- Identified and contributed to the resolution of issues that arose during testing and implementation.

Implementation Team Member – Consumer Electronics Industry

Served in an advisory function and acted as a liaison between financial and information systems personnel with a Foreign Payables System implementation (Proprietary software).

- Assisted with system design, testing, and implementation of system.
- Developed documentation and trained users.
- Provided follow-up consultation for problem resolution.
- Offered suggestions for increased productivity after implementation.

EDUCATION AND CERTIFICATIONS

Education

- B.S. Accounting, University of Indianapolis, Indianapolis, IN
- A.S. Computer Science, University of Indianapolis, Indianapolis, IN

Certifications

- PeopleSoft 8 Certified Financial Management Consultant
- State of Indiana, CPA

PRJ Consulting Inc.
PeopleSoft Solutions Advisors

Robert Carroll

Consultant, Trainer & Developer Lead

AREAS OF EXPERTISE

Extensive experience in the areas of Corporate Training, Training Needs Analysis, Instructional Design, Business Analysis, Organizational Development and Change Management for large scale ERP Financials and Human Resources systems implementations for public and private sector clients.

Training and Development

- Instructional Design and Development of ERP course content utilizing User Productivity Kit (UPK) and Adobe Captivate
- Instructor Led Training (ILT) for classroom and On-Line audiences
- Adult Learning Theory Principles
- Employee Training and Development

Project Implementation

- End User Needs Analysis, Reporting and Tracking
- Change Management
- Corporate Communications
- Policy and Procedure Development
- Management Consulting

Work Experience

01/13 – Present
Higher Technology Solutions
Chicago, IL
Senior Training Consultant
And
Curriculum Developer

Delivers Oracle/PeopleSoft private event classes and develops course content for Higher Education clients at the university and high school level as a subcontractor for HTS.
Performs training needs analysis and advises clients on best practice methodologies.
Develops training plans, curriculum outlines and creates on line and instructor led classroom training materials using the Oracle User Productivity Kit (UPK) as the primary authoring tool.
Involved with the system testing from a training development perspective.
Clients include: The Ohio State University and the Kamehameha Schools, Honolulu, HI

07/10 – 01/03
The Campus Guild
Indianapolis, IN
Senior PeopleSoft Training
and
Business Development
Consultant

Served as a consultant for ERP training implementations and system upgrades of PS Human Capital Management (HCM) and PeopleSoft Financials v. 9.1, v. 9.0, v.8.9
Areas of concentration for PS HCM: eRecruit, Talent Acquisition Manager (TAM),ESS, MSS, Human Resources (Position Management, Administer Workforce), Payroll, Time and Labor, Benefits Administration and Approver Workflow modules.

Areas of concentration for PS Financials: Accounts Payable (Requisitions, Purchase Orders and Vouchers), eProcurement (ePro), General Ledger, Asset Management, Project Costing, Budgets/Commitment Control, Accounts Receivable, Supply Chain Management, and Approver Workflow modules.

Responsible for developing and editing instructor led (ILT) classroom and on - line interactive training materials utilizing the Oracle User Productivity Kit (UPK) and Adobe Captivate.

04/12 – 05/12
State of North Dakota
Bismarck, ND
Senior PeopleSoft Training Consultant

Taught PeopleSoft HCM v 9.1Talent Acquisition Manager to Human Resource administrators and agency managers.

Areas of concentration included: eRecruit, ePerformance, Talent Manager, Employee Self Service (ESS), Manager Self Service (MSS) and Approval workflow.

Assisted the client's Subject Matter Experts in identifying and resolving functional issues during the User Acceptance Test (UAT) process.

Edited and updated training materials utilizing the Oracle User Productivity Kit (UPK).

09/11 – 12/11
The United States Senate
Capitol Hill
Washington, D.C
Senior PeopleSoft Training Consultant
HCM/ Financials 9.1
Senate Payroll System Implementation

As the training lead for the U.S. Senate PS v.9.1 Payroll and HCM System implementation project; my primary responsibility was as the liaison between the project and the Offices of the Senate Sergeant at Arms and the Senate Disbursement Officer for development, testing and delivery of the for PS Payroll and HCM v9.1 modules.

Develop training strategies, training plans and schedules.

Responsible for the development and publishing of the training materials, resource guides and job aides for the customized PeopleSoft 9.1 Human Resources, Payroll, Benefits Administration and Retirement modules in the User Productivity Kit (UPK).

Worked with the technical and functional resources in resolving errors that occurred during the testing process.
Ensured that strict adherence to the Senate's business policies and procedures were adhered to.

03/05 – 09/11
The FilAm Global Group, LLC,
Boston, MA and Manila, Republic of the Philippines
Owner and President

The FilAm Group, LLC was created to be a liaison for creating business alliances with U.S. and Canadian companies in partnership with public and private sector clients in the Philippines.
Involved with strategic planning and business development.
Provided educational consulting services in the areas of change management, curriculum development and training deployment for PeopleSoft HMS and Financials.
Recruited IT professionals for large scale implementation projects in the U.S.

09/10 – 01/11
The Food and Drug Administration (FDA)
Rockville, MD
Oracle Training Consultant

Conducted end-user training for FDA employees in the areas of iProcurement (procure to pay process), Document View (Oracle customized Query reporting tool) and Budget Execution.

Created training materials utilizing the Oracle User Productivity Kit (UPK) as the primary development tool.

09/10 – 01/11
The Food and Drug Administration (FDA)

Worked with subject matter experts to define and integrate the agency's policies, procedures, and best practice methodologies into the curriculum.

Rockville, MD
Oracle Training Consultant
(continued)

Revised and edited training manuals and created job aids as needed.

03/10 – 09/10
State of Delaware
Dover, DE
Senior PeopleSoft Consultant

Responsible for delivering the end user training of the PeopleSoft Accounts Payable P2P process (Requisitions, Purchase Orders and Vouchers), eProcurement (ePro), Supply Chain Management, General Ledger, Asset Management, Project Costing, Budgets/Commitment Control and Accounts Receivable modules.
Edited training materials in the Oracle User Productivity Kit (UPK) format.
Served as a functional resource in assisting the client in resolving post implementation issues regarding the Payroll and Time and Labor modules.
Provided post-production support (including configuration review)

10/07 – 12/09
State of Indiana
Indianapolis, IN
Senior PeopleSoft Consultant

Responsible for delivering the end user training of the PeopleSoft Accounts Payable (Requisitions, Purchase Orders and Vouchers), Supply Chain Management, eProcurement (ePro), General Ledger, Accounts Receivable, Project Costing and Asset Management modules.
Served as a functional resource in assisting the client in resolving post implementation issues regarding the HR, Benefits, Payroll, and Time and Labor modules.
Developed and edited training materials utilizing the Oracle User Productivity Kit (UPK) as the primary development tool.
Provided post-production support (including configuration review).

04/07 – 10/07
Pacific Gas and Electric
San Francisco, CA
SAP Change Management/ Training Consultant

Served as a change management and training lead for a major corporate training deployment for over 9,000 end users.

Modules included: New Business, Technical Design, Estimating, Long Lead Time Materials (Supply Chain Processing) and Project Costing.
The audience consisted of job owners, design engineers and senior management.

01/07 – 04/07
University of Pittsburgh Medical Center
Pittsburgh, PA
PeopleSoft Financials Training Consultant

Conducted eProcurement training classes for over 300 end users for the University of Pittsburgh Medical Center's PS Supply Chain Management system.
Edited and updated training materials as required by changes to the client's business processes.
Conducted post production labs and workshops.
Trained Help Desk staff and assisted in post-production support.

03/06 - 01/07
State of Indiana
Indianapolis, IN
PeopleSoft Payroll/
Time & Labor Consultant

Served as the Functional Implementation consultant for the PeopleSoft Time and Labor v.8.9 module.

Assisted with the development of the PeopleSoft Time and Labor implementation plan for the State of Indiana's Family Social Services Administration (FSSA).

Worked closely with the agency's change management resources offices and state hospitals in preparing agency personnel for the implementation of the new software system.

Assisted with the configuration and setup of specific rules governing Role Security, Permission Lists, Workgroups, and Task groups, Holiday and Comp Time Plans and Leave Plans for employees in both agency and hospital roles.
Served as a training resource for the HR, eRecruit, Benefits, AP, GL modules.

05/03 – 03/06
State of Connecticut
Hartford, CT
PeopleSoft Payroll &
Time & Labor Consultant/
Senior Training Consultant

In 2005 assumed a change management role in the PeopleSoft 8.9 upgrade of Human Resources Management Systems (HRMS/PeopleSoft) with emphasis in HR, eRecruit, Base Benefits, Benefits Administration, Payroll and Time and Labor modules.

Served as project liaison for the Payroll Services Division, Office of the State Comptroller.

Primary role was to assist the auditors and payroll staff in resolving payroll issues specific to the software.

In 2003, joined the project team as a senior training consultant on the Human Resources Management Systems (HRMS/PeopleSoft)v.8.3 implementation project.

Assisted in the training and development of trainers from various state agencies and departments for the customized PeopleSoft/Core CT software.
Provided functional consultation to the project and served as a training liaison between the project and various agencies throughout the State of Connecticut.

Developed and edited training materials for core courses and workshops.

11/01 - 05/03
University of Massachusetts

Dartmouth, MA
PeopleSoft
Training Specialist

Responsible for the training and delivery to approximately 350 end users of the customized PeopleSoft 7.5 version for the Financials (AP, GL and AR), HR, Payroll and Time and Attendance modules.

Provided PeopleSoft Query and Report Distribution classes to the Dartmouth campus end users.

Assisted in the upgrading and realignment of the change management components relative to the university's implementation of the new PeopleSoft/EMPAC process.

Served in an advisory capacity to the Director of Human Resources and the Vice-Chancellor for Business Affairs in matters relating to change management and the university's business process.

06/99 – 11/01
Commonwealth of Massachusetts, Boston, MA
PeopleSoft Trainer

2000-2001: Assisted in the system upgrade to version 8.0 for the customized PeopleSoft HR, Payroll and Time and Attendance application.

Served as project liaison supporting the Governor's Office, the Constitutional and Independent offices of the Commonwealth during the system upgrade.

From **1999 to 2000**: served as a PeopleSoft trainer in a major state wide training deployment of over 1800 employees on customized PeopleSoft 7.5 HR, Payroll, Benefits and Time and Attendance modules.

Provided PeopleSoft and data warehouse consulting support to multiple state agencies that had recently implemented the PeopleSoft applications.

Responsible for maintaining change management initiatives related to the Commonwealth's implementation of its new PeopleSoft program - Human Resource and Compensation Management System (HR/CMS).

2000-2001: Assisted in the system upgrade to version 8.0 for the customized PeopleSoft HR, Payroll and Time and Attendance application.

Served as project liaison supporting the Governor's Office, the Constitutional and Independent offices of the Commonwealth during the system upgrade.

Education

Oracle University, Chicago IL

- PeopleSoft Time and Labor for North America
- PeopleSoft Payroll for North America
- PeopleSoft Base Benefits
- PeopleSoft Benefits Administration

Suffolk University, Boston, MA,

- Bachelor of Science in English and Government

ataway
People | Process | Systems

ı Travis

lifications Summary

over twenty years experience in public sector education and government, Tina is a ly trained, hands-on, individual, experienced in all phases of a project's full system life e; stemming from initial project planning and client coaching to post go-live system ntenance/support and enhancements. She has estimated and developed project work ıs, mitigated risk, supervised and monitored tasks, performed functional trouble-shooting, lved production problems, interviewed and matched consultant skill sets, built and luated project teams, reported status on progress to all levels of management and ect leadership.

ditionally, Tina has interviewed stakeholders and business process owners, gathered uirements, facilitated design sessions, developed fit/gap analysis, process flow diagrams l supported fellow team members in all aspects of design and project execution. Further, has created formal, executive-level progress reports, participated on project steering nmittee meetings including strategy and project approach presentations.

ı is a highly motivated and positive individual, experienced in many aspects of system lementation including the following; project start-up/close-out via formal methodology, ckage selection assessments, technology and road map assessments, ERP readiness and nefits assessment/analysis, impact analysis, formal system upgrades, process ngineering, business transformation/implementation, system integration, system ıancements, quality assurance, unit testing, parallel testing, integration testing and user ceptance testing. She has performed and supported on-going production maintenance all pre and post go-live activities, developed business process and system documentation d performed hands-on knowledge transfer to both the user community and fellow project ım members. Overall, Tina has led and participated in successful projects within tight adlines, competing priorities, and fixed budgetary constraints.

fessional Experience

obal Director of Campus Solutions Practice

Ataway, US LTD. **9/13 – Present**

- Define the strategic direction for Ataway's global CS practice
- Assist in business development for consulting services (proposal content)
- Assist in the staffing acquisition for current and future projects
- Foster strategic relationships with key partners (VB Consulting, BASH Mobile, HTS)
- Supported City of Hope hospitals and HTS for admission/campus community
- Supported Mass Bay Community college and HTS for admission upgrade
- Provided post-production supported University of Miami International Admissions
- Provided training on Admissions and Campus Community with BallisticCell Consulting in Bulgaria

ataway
People | Process | Systems

er Technology Solutions, Inc. – Director of Strategic Consulting & Resourcing

TS Global, Inc. **11/12 – 9/13**

Assist business development of consulting services (writing proposal responses)
Assist in the staffing acquisition for current and future projects
Manage independent resources for all staff augmentation engagements
Client liaison /first contact issue escalation for staff augmentation engagements
Configure, populate and manage staffing resource database
Lead Admission implementation City of Hope Hospitals
Lead Admission upgrade for Mass Bay Community College
Act as on-call post-production support resource for Cornell for Admissions and Recruitment
Lead functional analyst for and production support / enhancement efforts of PeopleSoft Admissions and Recruitment for Bloomsburg University
Lead functional analyst for and production support / enhancement efforts of PeopleSoft Admissions and Recruitment for University of North Texas System.

npus Guild Consulting, Inc. – Owner

3ASH Mobile, Inc. **07/12 – 11/12**

- Assist in the business development of application and services that provide delivery of PeopleSoft Campus Solution Self-Service functionality via mobile devices.

?RJ Consulting, Inc. – HCM 9.0 Upgrade **12/11 – 5/12**

California State University – Dominguez Hills, CA

Managed a team of twenty lead individuals for both the Human Resource and Campus Solutions functional teams. Organized and planned delta workshop sessions. Defined project tasks for functional tracks. Spearheaded the effort to define and mandate a testing and sign-off schedule. Identified and assessed project high risks factors as well as proposed solutions to project and University leadership. Facilitated meetings with major stakeholders and business process owners. Conducted on-site client interviews with business process owners, gathered business requirements, performed fit/gap analysis, and documented requirements and findings. Coordinated go live weekend system scouting activities, issue escalation and post-go live support.

tringCan, Inc. – Recruitment and Alumni Fund Raising **08/11– Present**

Indianapolis, IN

- Provide business expertise and interface development knowledge for StringCan fund raising/campaign software for the higher education market space.

PRJ Healthcare, Inc. – ICD 10 Change Mgmt Anly **08/11– 05/12**

- Perform business process review and redesign to maximize both system and process efficiencies across the organization.
- Assist in the analysis of current ICD 9 code processing to determine revenue recovery.

Perform data analysis, provide and present reports regarding significant business impacts due to ICD 9 – ICD 10 conversion such as outlining revenue discrepancies, potential resource loss and training needs.

ITS Global – Admissions 9.0 Enhancements **05/12 – 08/12**
Bloomsburg University, Bloomsburg, PA

- Assess and configure PeopleSoft Campus Solutions Admission and Recruitment modules to accommodate newly implemented business initiatives. Specifically, region, recruiter, auto-evaluation, population selection and update functionality.

ITS Global – Admissions 9.0 Implementation **07/11 – 07/12**
East-West University, Chicago, IL

- Led, configured and tested 9.0 functional Admissions database for a "best-practice" scenario lab environment.

Cedar Crestone – Campus Community and Admissions 9.0 Upgrade Fit/Gap
Central Washington University, Ellensburg, WA **02/11 – 03/11**

- Led the Campus Solutions 9.0 functional team upgrade sessions for the Admissions and Campus Community teams. Demonstrated 9.0 system functionality, reviewed current customizations as well as business process optimization.

PRJ Consulting/IBM Canada – Campus Solutions Project Lead
Grant MacEwan University, Edmonton, AB, CAN **12/09 – 4/11**

- Utilizing the IBM Vision to Value implementation methodology, coordinated and presented all final project deliverables of the campus solutions 9.0 functional teams (Admissions, Campus Community, Student Records, Student Financials, Financial Aid and Academic Advisement) to project sponsors and executive leadership.
- Provided project leadership for enterprise integration during concurrent implementation of Campus Solutions, Human Resources and Finance projects.
- Led Campus Community team regarding all aspects of configuration, conversion, interfaces and extensions.
- Transitioned to PS Campus Solutions Admissions & Recruitment Lead after losing consulting lead 6 weeks prior to go live. Completed configuration, testing of reports, interfaces, conversions and extensions, training and production support.
- Assisted AA Lead wth Advising decisions and configuration / build.

ENTAP, Inc. – Project Manager
State of Indiana – Auditor of State's Office **8/07 – 11/09**

- Provided project management for the delivery of a state-wide system standardization of PS Finance 8.9 training for over 2000 agency end-users.
- Developed project plan and training schedule for the roll-out of training to over 2000 users state-wide
- Managed training and quality-assurance team in a post-production support
- Managed all logistical aspects of the content development, material creation and daily delivery of a state-wide, instructor led and online multi-class curriculum.

Specifically training on Project Costing, Accounts Payable, General Ledger, Billing, and eProcurement

andra Dunson, LLC /Oracle University – Trainer
Iniversity of Texas Health Science Center **05/09 - 05/09**
Provided Admissions training.

Anderson University – Consultant
Office of Admissions **10/09 - 12/09**
Provided post-production support for Admissions and Campus Community.
Provided upgrade assessment from 8.9 to 9.0.

Emory University – Consultant
Office of Graduate Admissions **1/09 – 12/09**

- Led fit/gap analysis sessions for deployment of the PeopleSoft Student Campus Community, Admission and Recruitment modules.
- Identified system gaps, and designed functional specifications to tailor functionality towards university needs and requirements.
- Provided planning/implementation strategy support to the internal project management team. Specifically, facilitated cross-functional meetings, prepared and maintained project task, timeline and schedule documentation as well as managed resource planning.
- Provided project planning, customization analysis/design, conversion planning, interface design, testing, scope definition, reporting and training strategy development for both traditional and non-traditional academic structures.

Prairie Quest Consulting – ERP Practice Director
State of Indiana – Family Social Services Administration (FSSA) **5/06 – 9/06**

- Developed training documentation for Project Costing and General Ledger reconciliation processes.
- Provided business process expertise for redesign and development of business process documentation and queries to support process changes for accounting end-users for PeopleSoft Finance 8.4.
- Provided documentation and training to end-users regarding AOS reconciliation processes.

University of Houston Systems **3/06 – 6/07**

- Provided PeopleSoft functional lead support for Admissions and Campus Community for University of Houston System for implementation of 8.9 Campus Solutions.

Carnegie Mellon University **2/06 – 2/06**

- Provided ERP selection feedback and assistance for Carnegie Mellon University.

Kansas State University **9/06 – 12/06**

Provided Campus Solutions 8.9 integration assessment for project management for Kansas State University.
Provided overall implementation timeline and implementation schedule for 8.9 Admissions for Kansas State University.

› Consulting, Inc, - Senior Consultant/Project Manager
:alifornia State University: **1/02–12/06**
:alifornia Maritime Academy
:SU – San Bernardino
:SU – Channel Islands
:SU – Chico
:SU – Sacramento
:SU - Fullerton

Provided Project Management, Campus Community, Admission and Recruitment consulting support for the implementation of PeopleSoft Student Administration at multiple California State University Campuses.
Led fit/gap analysis sessions for deployment of the PeopleSoft Student Campus Community, Admission and Recruitment modules.

- Identified system gaps, and designed functional specifications to tailor functionality towards university needs and requirements.
- Provided planning/implementation strategy support to the internal project management team. Specifically, facilitated cross-functional meetings, prepared and maintained project task, timeline and schedule documentation as well as managed resource planning.
- Provided backup assistance on academic advising build for California Maritime Academy.

PeopleSoft, Inc USA – Process Specialist/Project Manager
Emory University **3/99 – 12/09**
Oxford College of Emory University
Nell Hodgson Woodruff School of Nursing
Rollins School of Public Health
Goizueta Business School
Candler School of Theology
School of Medicine

- Led fit/gap analysis sessions for deployment of the PeopleSoft Student Campus Community, Admission and Recruitment modules.
- Identified system gaps, and designed functional specifications to tailor functionality towards university needs and requirements.
- Provided planning/implementation strategy support to the internal project management team. Specifically, facilitated cross-functional meetings, prepared and maintained project task, timeline and schedule documentation as well as managed resource planning.

Provided project planning, customization analysis/design, conversion planning, interface design, testing, scope definition, reporting and training strategy development for both traditional and non-traditional academic structures.

os Rios Community College District **3/01 – 6/01**

Led fit/gap analysis sessions for deployment of the PeopleSoft Student Campus Community, Admission and Recruitment modules.
Provided planning/implementation strategy support to the internal project management team. Specifically, facilitated cross-functional meetings, assisted client project manager with preparing and maintaining project task, and timeline.

.eland Stanford University **1/01 – 3/01**

- Provided functional lead expertise for the development of the PeopleSoft Reporting Data Store product for Student Administration/Campus Solutions Admissions, Recruitment and Campus Community.

Jniversidad PanAmericana **9/00 - 9/00**

- Created an Admissions and Recruitment prototype.

Central Queensland & Griffith University – Australia **9/00 – 9/00**

- Delivered Academic Advising training

Christopher Newport University **5/00 – 7/00**

- Led fit/gap analysis sessions for deployment of the PeopleSoft Student Campus Community, Admission and Recruitment modules.
- Identified system gaps, and designed functional specifications to tailor functionality towards university needs and requirements.
- Provided planning/implementation strategy support to the internal project management team. Specifically, facilitated cross-functional meetings, prepared and maintained project task, timeline and schedule documentation as well as managed resource planning.

Oklahoma University Health Science Center **11/99 – 11/99**

- Delivered preliminary campus community sessions with various campus users to discuss shared data standards, data stewardship, business rules and best practices
- Assisted in the timeline and schedule for Campus Community data conversions.

Virginia Community College System **5/00 – 5/00**

- Assisted with building an Admissions prototype in a multi-institution academic structure.

University of Central Florida **8/99 – 4/00**

- Provided post-production support for Admissions report development.
- Led sessions across all functional areas for 3C development.

ataway
People | Process | Systems

allaudet University **10/98 – 3/99**

Led fit/gap analysis sessions for deployment of the PeopleSoft Student Campus Community, Admission and Recruitment modules.
Identified system gaps, and designed functional specifications to tailor functionality towards university needs and requirements.
Provided planning/implementation strategy support to the internal project management team. Specifically, facilitated cross-functional meetings, prepared and maintained project task, timeline and schedule documentation as well as managed resource planning.

urdue University - Admission Counselor/Business Analyst

)ffice of Admission **1/95 – 4/98**

- Served as an analyst for the custom built Student Contact System (SCS)
- Developed training materials and trained Admission staff on the SCS system
- Developed and executed ad hoc as well as summary level queries and reports
- Maintained the Office of Admission website
- Assisted in the development of an experimental database to collect and use geo-demographic software to be used for future efforts regarding prospective student choice modeling, targeted recruitment and marketing.

cation Achieved

---

due University
:helor of Arts, English (Professional Writing for the Computer Industry)

Professional References upon Request

ataway
People | Process | Systems

GIRISH PRABHU

PROFESSIONAL SUMMARY

Over 12 years of experience in managing complex, multi-million dollar IT projects on time, and under budget constraints. Extensive experience in assisting and advising executive stakeholders, and helping them plan their company's technology needs with long term and short terms IT goals.
Implementation experience, managing the entire SDLC, with specific hands on knowledge in PeopleSoft CRM and Campus Solutions.
Worked with diverse team that included off shore global support team, employees, contractors and third party vendors to develop project plans, execution tasks and code.
Business process re-engineering and IT implementation experience in the Manufacturing, Public Sector, Financials, Commercial, Health care, Higher Education, Supply chain (40 US States) and Consulting

Experience Summary

Project Management- Project strategy, Team Leadership and Functional lead on six PeopleSoft implementations for major organizations. Outlined project plans and monitored on a day-to-day basis, the critical path and milestones.

PeopleSoft Applications and Tools-Hands on configuration and strong knowledge of PeopleSoft CRM up to 9.2, CAMPUS Solutions (Admissions and Enrolment) Integration broker and row level security

Training and Initiation- Sales force (Service, Cloud, Admin) and Oracle on Demand

Process Management-Highly experienced in requirements definition, gap analysis, functional analysis and design, development, system configuration, process design, unit testing, system integration testing, user acceptance testing, quality assurance testing, training, and post-production support.

Reporting- Reverse engineering of contract and operational reports, analyzing the ETL's (SSIS packages, stored procedures) to determine the data mapping. Road map to determine the future state of reporting with reference to source systems and data warehouse. Requirement gathering to meet the client expectations for reports and data field definitions

PROFESSIONAL EXPERIENCE

Industry-Consulting

#	Company Description	Role & Clients	Modules
1	Exeter Group 2011Oct-Present	Higher Educations and Health care Project Management, CRM~ Admissions Process design and implementation	Marketing, Event Management, Online Marketing, Email Response Management, Correspondence, Recruiting and Admissions
2	Cedarcrestone 2010Mar-2011Oct	Higher Education, Commercial, State Program Manager, CRM Project Manager and Implementation Lead	Marketing, Sales, Correspondence, Recruiting & Admissions
3	Ciber Inc 2008Feb-2010Feb	Higher Education CRM Project & Functional Lead	Marketing, Online Marketing, Multichannel communications, Correspondence, Case Management, Sales, Recruiting & Admissions

Clients

Higher Education Institutions-Project Implementation	
1	**Vanderbilt University-Undergraduate and Medical School** **PeopleSoft CAMPUS 9.0 and CRM 9.1 (Admissions, Academic Lifecycle) and Nolij Imaging** Vanderbilt is now managing million+ person record using the PeopleSoft CRM and CAMPUS solutions including 700,000+ suspects/prospects as well as nearly 200,000 applicants, students, and alumni synchronized using the delivered integration with Campus Solutions. Recruitment communication and event and travel management is in full swing. Vanderbilt expects to process upwards of 30,000 applications through Campus Solutions/Nolij over the next 6-7 months and we've removed the need to print ~ 500,000+ sheets of paper, manage 30K physical application folders
2	University of Northern Iowa-PeopleSoft CRM 9.1
3	University of Nebraska-PeopleSoft CRM 9.1
4	Bellevue University- PeopleSoft CRM 9.0 and Admissions

Higher Education Institutions consulted-

1) AZUSA Pacific University
2) Buffalo State University
3) University of Texas, Arlington
4) University of Baltimore
5) Ball State University
6) Akron
7) American College-PA
8) Towson

Work Details

Project Management

- Assisted senior leadership in outlining the strategy behind IT directives and helped to set up the Strategic direction for the PeopleSoft Customer Relationship Management and PeopleSoft Admission platform
- Maintained strong communications between the executive team and project team on the health of the project. Outlined communication norms and practices to ensure smooth flow of communications during the entire project.
- Created the road map for the PeopleSoft CRM and Admission implementation based on their objectives that included

- Business process re-engineering
- Process enhancement
- Retire legacy CRM and Admission system
- Evaluating and tracking applications online
- Implementing the new CRM and admission system
- Continue Recruiting activities
- Expand reporting and analytics

- Outlined the CRM and Campus Solution project baseline with an high level schedule and a detailed project plan with the WBS that involved the milestones and the concurrent activities/tasks with resource allocations
- Created a day to day task based plan that mapped to the milestones which were a part of the critical path on the overall project plan,
- Maintained weekly status reports with the team, which included project based activities along with personal issues if any,
- Focused more on the "change of scope" by using tools like the JIRA system extensively for –Change management, ticketing, work break down, task assignment and technical development iterations
- CRM and CS Admission product evaluation which was a part of the fit and gap analysis with the key stake holders

Business Process and Technical Hands on Implementation

- Lead the business process requirement gathering sessions and documented the pain points, gaps-system and process based,
- Designed, developed, implemented PeopleSoft CRM9.1 modules-Marketing, Event Management, Online Marketing, ERMS, Correspondence, Academic enrolment, Case Management set up
- Assisted hands on for the PeopleSoft Admissions, on the fit gaps, set up of the core tables, process documentations, testing and training

  - Set up the Event management module to manage
    - Travel and High school trips
    - Sessions within an event
    - Conferences
    - On campus events
  - Set up the online marketing modules to manage the communication flow for different target groups like
    - Freshmen Junior/senior
    - Applicants
    - Enrolled students
    - Spread out the specific communication templates/letters based on date and time triggers
  - Set up the Email Response Management system to track
    - All inbound and outbound emails
    - All print correspondence
    - Email assignment to counselors

- Set up Integration between HR ~ CRM and Campus Solution ~ CRM.Trouble shoot issues at the IB level,
- Data load and management of prospects in the new CRM System,
- Recruiter Assignment and prospect management
- Wait list process
- Set up admissions for Application entry and maintenance
- Duplicate record management and search match
- Check list assignment and processing
- Nolij process and file flow
- Managing and tracking Marketing Events and campaigns with the cost of collateral attached to each campaign,
- Prospect management by logging all interactions so as to view a complete 360 degree view of the prospect,
- Set up the case management process of creating the quick code for case creation, solution libraries, AAF's,
- Associate budget and costs with each objects involved in the process so as to get the yield of recruiting
- Set up and executed the Online Marketing dialogs for the automated communication flow
- Set up row level security based on the roles of the users in the system for CRM and CS

Data conversion and Load

- Assisted in the data mapping between the legacy source system to the current PeopleSoft CRM system
- Mapping between the CAMPUS SOLUTION system and CRM system
- Outlined the field descriptions and definition
- Demonstrated the delivered tools of Data Import, Prospect import
- Purchased lists, test scores

Integration

- Created the road map to set up the integration between CS ~ CRM
- Assisted in setting up the services operation and the messages in CS and CRM using Integration broker
- Trouble shoot issues in the sync between the 2 databases

Testing, Training and Support

- Outlined the approach to the CRP (Conference Room Pilot) sessions and system testing with the internal team
- Assisted in writing and executing the test scripts
- Maintained a very good project repository that would eventually act as post implementation support to the client. This involved issues, solutions, training docs, process docs, lessons learnt

CRM Metrics(Most recent project)

- 700,000 + records converted
- 1.5 million person records managed in CRM

- 2.8 million outbound emails sent
- 25k marketing events
- 100k parent help desk cases managed

Industry Health Care

Diplomat Specialty Pharmacy
Reporting-Contract and Operational

- Assisted in creation of the road map to assist leadership on planning the reporting structure in future state
- Reverse engineering of existing reports-contract and operational, analyzing existing mapping between source system and legacy data warehouse
- Lead a team that analyzed the ETL's that included stored procedures to generate reports
- Requirement gathering initiatives to determine client requirements

Industry-Commercial

Blackboard Inc **2007Aug-2007Nov**

Business Analyst, System Audit and CRM Functional Lead

- Audited the existing CRM implementation for Sales force automation
- Carried out a diagnostic study of the CRM processes focusing on increasing productivity of Sales Force by looking at SFA component
- Analyzed and prepared reports on areas to modify/change as enhancements
- Defined new processes to streamline existing processes to optimize time/revenue
- Evaluated the entire Sales flow right from generation of the Lead, opportunity and order in CRM to order fulfillment in the FSCM

Industry-Public Sector

Philadelphia Housing Authority **2006Nov-2007Aug**

Business Analyst and CRM Functional Lead –
PeopleSoft Modules- Help desk, Marketing, Correspondence, Strategic Account planning, Field service,CTI

- Business process analysis of the existing process and pain points
- Led the team for estimation, prioritization, scoping of the project for Marketing, Correspondence and Strategic Account Planning
- Designed a system where their marketing campaigns were tagged with their partners in their system, which had accounts plans that included certain metrics that reflected their contributions in terms of finance, service or material. At the end of the campaign we had an holistic view of their commitments versus actuals.
- Part of the implementation of their Call center applications like Case Management for Customer and Employee support. Extensive work shop sessions with stakeholders from different departments to help understand the marketing campaign process for Fund raising & Service, Rental and Homeownership Campaigns, Informational Campaigns
- Define Marketing campaign execution and management process, to monitor budget spent versus revenue generated at each events. Assisted IT to set up the marketing database by capturing customer information from the various sources of information
- Analyzed the data to create target groups for database marketing based on business user criteria. Streamlined and defined the correspondence process to communicated with some

of the most important dignitaries like **Senators and White House using** CRM Correspondence. Defined the process of generating the correspondence list for Marketing campaigns for email, print, radio, magazine and so on,

- Developed reports to capture costs versus budget used for all the Marketing collateral to get a sense of the campaign success rates Used the Strategic Account Planning module to help gauge the success of their relationship with corporate companies
- Part of the Steering Committee to take critical decisions on IT systems and CRM Project Plan

Industry-Finance

Ameriprise Financials **2006Sept-2006Nov**

Business Analyst and CRM Process/product Evaluation
PeopleSoft CRM HR Helpdesk

- Led the team for estimation, prioritization, scoping of the project
- Developed the project plan with resource allocation for the CRM HR Helpdesk
- Analyzed the current needs of implementing CRM HR Helpdesk for their benefit enrollment to start in November 2006 on Process/Medical/LLD/Vision etc. Defined processes to meet the pain points with reference to agents that were taking calls on HR related issues and resolving them by referring to paper manuals and files.
- Explained the knowhow of the knowledge management system to create the Problems-Resolutions in the CRM system. Defined the process flow using data modeling tools like Visio
- Presented as to how, with Helpdesk for Human Resources, the value is beyond just the cost savings for resolving workforce issues. There is strategic value in increasing employee satisfaction through reduced processing times and an improvement in the quality of service delivered.
- Set up the solution libraries, FAQ's, case quick codes, case relationships and related core set up tables for case management
- Set up AAF's policies that triggered based on criteria of the case priority
- Assisted in the integration set up between CRM and HR for syncing the worker records over to CRM

Industry-Supply Chain and Manufacturing

Clymer Advanced Technologies **1998Aug-2005Nov**

Project Manager-ERP / CRM Manager

- Major factor for the increase in business from $5 million to $ 15 million from 2001 to 2005.
- Defined the inbound marketing process that involved creating offers to existing customers on cross sell opportunities
- In charge of a satellite Sales Rep team located across the country. Outlined the sales plan that included the targets for the month, sales offers and target based incentives for the team
- Defined the demand generation content based on the client profile so as to target and invoke the right product interest

- Working with Business teams gathering requirements and evaluating the need for customization. Outlining Process Diagrams to help team members understand the PeopleSoft system easily
- Understanding and brain storming with business on the manufacturing challenges, product development challenges and pain points that impact the entire manufacturing process
- Managed the entire cycle of Sales to Order Capture to Order Fulfillment to Financial Supply
- Set up the correspondence management system to enhance customer retention
- Liaison with the off shore vendors to manage the product development and supply for more than 100 product items
- Assisted manufacturing team to evaluate the product for reverse engineering by facilitating the drawings, reports and other product attributes/current paint point info gathered from client

EDUCATION/certifications

Graduate Certificate, Physics, Bachelor of Science-Dhempe College of Science-India
Master in Business Management,(M.B.A) Goa Institute of Management, India(1 year course work)

Project Management-Tools & Techniques – Certificate of Achievement

Application Skills/Training

CRM Processes:	Marketing(B2B,B2C,Database,Direct,Channel) Online and Tele-Marketing,, Partner Management, Case/Incident Management, Sales/Channel Sales, Help Desk, Computer Telephony Integration (CTI),Recruiting & Admissions Online App, Multichannel Communications, ERMS(Email Management Response System)Order Management, Order Capture, Strategic Account Planning, Workforce Communications Security roles and Admin
Higher Education Processes:	Application entry, processing, evaluation and maintenance, Checklist assignments, waitlist tracking, Alumni outreach and interviewing,
CRM Applications:	PeopleSoft, Talisma, Hobson's, EMAS, Microsoft Dynamics, Sales force and Oracle on Demand
Testing Methods/Levels	Static + Dynamic testing, Black- box, Grey Box, White box testing. Unit testing, Integration testing, System test and UAT
Other Software/ Tools/Utility:	Data modeling applications like Visio, MS Project, Web services, SAAS applications, MS Project, operating systems(Microsoft Windows-NT,XP,2000 &7,Mac OS X,UNIX, Linux, Sun Solaris, SharePoint, JMeter, JIRA

ataway
People | Process | Systems

LAURA BETH "LB" ROBBINS

Ataway US, LTD, April 2014 – present

Functional Lead Consultant, Campus Solutions, Admissions and Campus Community – Delivered education and training on system configuration and business best practices to multiple International clients.

CedarCrestone Consulting Inc., November 2007 – present

- **Functional Lead Consultant, Campus Solutions, Admissions and Campus Community –** Delivered education and training on how to set up and maintain the Oracle Campus Solutions Admissions and Campus Community modules according to an institution's business needs, primarily through fit-gap sessions or ongoing sessions throughout an implementation cycle. Managed milestones or phases through a project plan. Produced test scenarios, scripts and scheduled sessions for end user testing. Documented identified business processes within Admissions or campus wide. Created reports to ensure set up and edit check data entry. Provided production support to admissions staff once the new system went live.

Emory University, Oxford College, September 1995 – November 2007

- **Associate Dean of Enrollment Services/Director of Operations, Enrollment Services –** Provided production support for the Admission and Financial Aid module of PeopleSoft 8.0 Student Administration, including testing of regulatory releases and bundles as well as the testing and maintenance of customizations. Drafted functional requirements and oversaw the development of customizations and modifications. Developed an undergraduate report concerning the status of enrollment and recruiting strategies to the dean. Created documentation defining the system configuration and annual setup values. Provided leadership for a staff of five coworkers and supervised the operations of the enrollment services office which includes admission, financial aid and student records. Designed a student employment website to serve Oxford's student employees, supervisors and timekeepers. Proposed and implemented a staff restructuring of the operations staff to a customer service unit. Supported event planning efforts for information sessions, open houses, preview days, scholar weekend and orientation. Reviewed admission and financial aid applications. Maintained contact with prospective students, incoming and enrolled students regarding admission and/or financial aid.
- **Assistant Director of Admission Operations** – Served as the functional lead for Oxford College and its implementation to the PeopleSoft 8 Admissions module of the Student Administration suite. Performed an assessment and identified the parallel functionality of the system, determined the revised business process, mapped a new workflow for the office, and developed all appropriate field and setup values as needed. Proposed common fields for recruiting centers, referrals sources, as well as new reporting functionalities that can be utilized by all Emory University admissions offices. Developed, designed, and published all project documentation including a comprehensive training manual. Conducted end-user training sessions. Served as a member on the Admissions work group, functional leads and production team for the PeopleSoft project. Assisted financial aid director in the processing of financial aid in PeopleSoft 7.6. Coordinated recruitment publication cycle and approved annual edits. Served as the travel coordinator for recruitment staff. Proposed and implemented a travel website for recruitment staff to track travel statistics. Recruited students by traveling to high schools and college recruitment fairs in South Florida and metro Atlanta areas.

- **Assistant Director of Admission** – Recruited students by traveling to high schools and college recruitment fairs in the Southeast and Midwest. Reviewed, analyzed, and rated applications of students applying for admission. Conducted information sessions for visiting students and parents, and conducted campus tours. Managed the campus tour guide program. Reviewed and packaged financial aid for current students through College Board Powerfaids. Composed correspondence and generated reports.
- **Admission and Financial Aid Advisor** – Recruited students by traveling to high schools and college recruitment fairs in the Southeast. Reviewed admission applications as a first reader. Coordinator for scholar weekend for incoming students. Reviewed and packaged financial aid for current students through College Board Powerfaids. Maintained communication via telephone, correspondence, and/or electronic mail with prospective students through all stages of the recruitment and admission process.

Mercer University, Admissions Advisor, September 1993 – August 1995 – Provided admissions counseling and advisement to prospective students about the admissions process at the undergraduate and graduate level through recruiting events and in one-on-one meetings. Reviewed applications, evaluated transcripts and other supporting materials. Recruited students by traveling to high schools and college recruitment fairs in the mid-Atlantic region. Served as a financial aid liaison.

Summary of Professional Experience

Client Name	Project Type	Modules	Role
BallisticCell – Bulgaria	Training	Admisisons and Campus Community	Functional Trainer
Ontario Universities Application Commission - Canada	Implementation	Admissions and Campus Community	Functional Lead
Penn State – beginning March 3	Implementation	Admissions	Functional Lead
University of Miami	Implementation	Admissions and Campus Community	Functional Lead
University of Texas Health Science Center at Houston	Implementation	Admissions and Campus Community	Functional Lead
University of Nebraska	Training	Communication Generation, Population Selection	Trainer
University of Maryland–Eastern Shore	Production Support	Admissions, Campus Community	Functional Consultant
Bryn Mawr College	Training	Communication Generation, Population Selection	Trainer
University of Nebraska–Medical Center	Production Support	Admissions, Campus Community	Functional Consultant
Frederick Community College	Training	Population Selection	Trainer
Heartland Community College	Fit/Gap Session	Admissions, 3Cs (Communications,	Functional Consultant

ataway
People | Process | Systems

Client Name	Project Type	Modules	Role
		Checklists, and Comments)	
Westchester Community College	Implementation	Admissions, Campus Community	Functional Lead
Southwestern Illinois College	Implementation and Production Support	Admissions, Campus Community, Student Records	Functional Consultant
Emory University, Oxford College	Production Support	Admissions, Financial Aid	Associate Dean of Enrollment Services/Director of Operations, Enrollment Services
Emory University, Oxford College	Implementation and Upgrade	Admissions	Assistant Director of Admission Operations,
Mercer University	Admissions/Recruiting	N/A	Admissions Counselor

Education

- Mercer University – Bachelor of Arts, Education; Minor, Communications

Professional Training, Certifications, and Affiliations

- Emory University Award of Distinction, 2001
- Enrollment Services Exemplary Award, 2007
- Chair, Enrollment Services Metrics and Measurement Committee, 2005
- Member, Enrollment Services Advisory Committee, 2005 to 2007
- Member, Enrollment Services Advisory Council (upper Administration), 2006 to 2007

Technical Skills

Other Software, Tools, and Utilities

- Microsoft Office
- User Productivity Kit (UPK)
- Visio
- Peoplesoft Query (Reports)
- Meeting Maker
- Internet Explorer
- Microsoft Excel
- Microsoft Project
- First Class
- Microsoft Outlook

References

Available upon request

ataway
People | Process | Systems

Ryan Downham

OBJECTIVE

Detail-oriented professional seeks to utilize education, 12 years of information technology experience, and proven capabilities to benefit an organization.

SUMMARY OF QUALIFICATIONS

More than 12 years experience in business requirements, application development, customization and user support. Background includes programming, analysis, and systems development on mainframe and client-server environments. Major strengths include:

- High degree of functional and technical expertise combined with business knowledge
- Strategic planning and design
- Leader and self-starter
- Trouble-shooting and problem solving
- Ability to convey rationale to technical and non-technical participant
- Detail oriented with strong organizational and communication skills

EXPERIENCE

Data Warehouse / Transparency Analyst 2011-Present
Auditor of State of Indiana

- SSIS ETL coding and documentation
- Interact with Agency/BAs to further refine and understand data specifications
- Work with DBA(s) in creation/review of supported data models and structures
- Report and interact with project team on progress and data issues
- Website Development and maintenance/support

PeopleSoft Functional Analyst / Technical Developer 2007-Present
Auditor of State of Indiana

- Examine systems applications issues, problems, improvements and present options for resolution
- Document all change and enhancements
- Make test material/plan to validate development and modification of code
- Carry out testing according to the test standards and procedures
- Review test results and present for sign-off
- Assist other team members and provide on-call support
- Formal Training in PeopleTools 8.48, Application Engine 8.5, PeopleCode 8.5, PS Query 8.5, SQR, XML Publisher

Director of Information Technology 2005-Present
Auditor of State of Indiana

- Establish current and long-range direction of technology in accordance with the direction of the agency
- Actively involved in the budgeting process with agency senior management for the information technology division
- Works with Procurement department concerning IT projects and budget impacts
- Participate in overall planning for the agency bringing current knowledge and future vision of technology and systems as related to the agency's operations
- Identifies and bridges gaps in business functions with technology solutions, analyze new technologies, and make recommendations to agency senior management
- Coordinates and prioritizes projects with other departments or agencies within the State.

- Leads efforts in disaster recovery and IT continuity planning and testing
- Works 'hands on' completing assigned projects in Payroll, Finance, and LAN
- Represent the agency's information technology division at events and meetings that are within and outside state government

Senior Systems Analyst 2001-2005
Auditor of State of Indiana

- Transformed client requests into detailed system specifications
- Developed and enhanced complex systems and/or software from general requirements
- Responsible for systems testing including the development of systems testing strategies
- Coordinated Implementation of project with Operators
- Provided user support and resolved problems by answering questions for Internal/External Users
- 12+ years of COBOL programming, MVS, Z/OS JCL, VSAM, Databases
- Ability to quickly master new technology and related development tool sets

EDUCATION

Indiana Wesleyan University 2006
Indianapolis, Indiana

- B.S., Business Information Systems
- GPA: 4.0

International Business College 2000
Fort Wayne, Indiana

- A.S., Computer Programming and Applications Specialist
- GPA: 3.99

ataway
People | Process | Systems

MOHAMMAD MUDASSAR

Objective

Pursuing a career growth as Oracle **PeopleSoft Campus Solutions Consultant.**

PeopleSoft Application Skill

As Oracle PeopleSoft Campus Solutions functional Consultant, I am involved in configuration, maintenance, and post implementation support. During this short period of time I have gain considerable exposure in core module of campus solutions, UAT testing, requirement analysis & end user training.

- Requirement gathering (Fit Gap Analysis)
- Mapping of the product.
- Academic Structure
- Campus Community (Bio/Demo, Service Indicators, 3C's)
- Student Records
- Grade Book
- Security Administration (User Profile, Permission List / Role's)
- Self Service (Faculty & Student)
- BI Publisher.
- Worked on UAT and Support. UPK's
- Tree Manager.

Education

Masters in Business Administration (MBA) - IT *2004*
SZABIST, Karachi
Concentration in: Supply Chain Management, Operations Research, IS Audit, Business Process Reengineering with ***CGPA****: 3.22*

Post Graduate Diploma, Computer Science & IT *2001*
NED University of Engineering & Technology, Karachi
Concentration in: MS Office Package, Windows NT, VB, Intro to Programming, COBOL/400, and Project. ***CGPA****: 3.35*

Bachelors of Commerce (B.Com) *1999*
DHA Degree College for Men, Karachi
Second Division

Work Experience

ataway
People | Process | Systems

Sapphire Consulting Solutions, *PS Campus Solutions 9.0 (Functional Consultant)* — *Feb 2013 to-date*
(Oracle Gold Partner in ERP implementation)

***Project Implementation*: IoBM (full cycle implementation)**

Deputed at Institution of Business Management (IoBM), Karachi, Pakistan for the implementation of campus solutions

Actively involved in the configuration of academic structure, student records in support with team lead, Security & permission list, requirement gathering, UAT, & support to client. (Skills detail in profile summary above.)

Ability to conduct training sessions for end users, Also possess good report writing skills.

SBT Japan Ltd (Pakistan Office), Tele-Sales Executive — *Nov 2010 to Sept 2011*
(Multinational Japanese Automobile Exporting Company)

The work involved selling all types of Japanese used cars in the International market. Ensure timely shipment of customer orders and frequent follow-up and complaint resolution

Advance Cell Phones L.L.C, Dubai, UAE. General Administration. — *May 2010 to Oct 2010*
(Nokia Mobile Franchise Company)

Oversee all administrative matters relating to cash transaction, sales report, and conduct market survey.

Oman International Bank S.A.O.G, ***Dealer Treasury.*** — *Apr 2007 to July 2007*
(Oman based Commercial Bank)

Handle all money market and FX transactions. Responsible for managing the banks liquidity and plan maximum yield on Treasury assets. Maintain CRR & SLR.

Akhai Capital Management ***Dealer Money Market*** — *Jan 2007 to Mar 2007*
(Brokerage House -FX & Money Market)

Match and structure inter-bank treasury deal so that it results in a profit. Prepare and maintain liquidity positions.

Al-Zamin Leasing Modaraba, ***Finance Officer*** — *May 2006 to Jul 2006*
(Islamic Leasing Company)

Manage a portfolio of 100 million in equity and also involve in repo against TFC's. Manage and reconcile equity transactions.

Metropolitan Bank Limited, ***Officer Grade II (Credit Analyst)*** — *Oct 2004 to Jan 2006*
(Top 5 Commercial Bank in Pakistan)

Analyze client's balance sheets and prepare credit proposals for their limits and present to the management. Also prepare credit analysis report. Liaison with branch for enhancement of credit limits and other query.

IT Skills

- One Year Post Graduate Diploma in Computer Science (NED University), 2001-2002
- MS Office 2000 for Professionals from Petroman. (Word, Excel, PowerPoint, Access)

nces

References furnished upon request.

ataway
People | Process | Systems

Norman Tao

r Functional Consultant, Project Manager

ackground

Norman has about 10 years of CRM experience with ataway, PeopleSoft China Development Center and arvato services China as consultant, project lead, delivery manager and Sr BD manager ever since 2003. His areas of focus are PeopleSoft/Siebel consulting service, CRM operation and BPO, Member club consulting and database marketing etc. His personal strengths are Project Management (PMP), sales and presales support.

orking History

- **2009/12 – Present**

Project Manager – ataway Info. Technology Co., Ltd

- Full life-cycle project management for both CRM and non-CRM projects
- Presales support

- **2008/06 – 2009/12**

Senior BD Manager - arvato services (China)

- Senior BD Manager in China HQ, In charge of corporate level business development and project setup;
- Executive Assistant to VP, assisting VP for key accounts relationship development and maintenance.

- **2003/11 – 2006/12**

Delivery Manager/Sales Manager – PeopleSoft China Development Center

- 4 years as Project Manager and Delivery Manager at PeopleSoft China Development Center, be responsible for department-level daily operation and the delivery of important projects;
- 1 year sales manager for selling PeopleSoft and Siebel implementation and support service.

- **1997/10 – 1999/08**

IT Specilist – Yantai Archive Bureau

- Computer Hardware and Software maintenance
- Archive Management Database development and maintenance

ystems and pplications kills

PeopleSoft CRM(Functional)

- Customer data model, Product data Model, Marketing, Online Marketing, Event Managerment, Sales, Support and Helpdesk, for version 8.8 – 9.2

Siebel CRM(Functional)

- Basic concept on Siebel Marketing, Sales, Loyalty engine, customer service etc.

PeopleSoft HCM(Functional)

- HCM Workforce Administration, Compensation, Global Payroll, Workforce Development, Enterprise Learning and Workflow

PeopleSoft (Technical)

- Application Designer, Data Mover, SQR, Query, PL/SQL, Crystal Reports, Nvision Reports

Microsoft Office

- Execl, Word, Access, Project, PowerPoint, Visio

Operating systems

- Windows
- DOS

DataBase

- ORACLE
- SQL Server 2003

Education and Training

Education

- **China Ocean University**
  (Sep 2000 – Jul 2003)
  Master of Computer Control
- **Ocean University of Qingdao**
  (Sep 1993 – July 1997)
  Bachelor of Engineering, Industrial Automation

Training

- **2006/12 -- 2007/03: CPMI**
  Certificate: PMP
  Training Location: Beijing
  Description in Details: PMP Number: 460328
- **2005/03 -- 2005/05: VanceInfo**
  Advanced Project Management
- **2004/12 -- 2005/03: PeopleSoft Inc**
  PeopleSoft CRM Fundamentals
- **2004/12 -- 2005/03: PeopleSoft Inc**
  PeopleSoft HCM Fundamentals
- **2004/10 -- 2004/12: PeopleSoft Inc**
  PeopleTools I&II

Languages

Languages

- **Chinese** - Native

- **English** - Fluent

ain Project :ferences

Project 1

2004/10 -- 2006/08 : PeopleSoft CRM 8.9, 9.0 R&D and System Test
Team Leader – China team

Description
- Involved in R&D activities by working with PeopleSoft global team;
- Manage Double-byte testing coverering all modules of PeopleSoft CRM, including but not limited to Customer Data Model, Product Data model, Sales, Order Capture, Marketing, Online Marketing, Support, Helpdesk, SmartView, Product advisor etc.
- Work on bug fixes;

Project 2

2010/10 -- Present : Lafarge CRM system Support (PeopleSoft)

Project Manager

Description
- Lead up the overall support process of the team for client PeopleSoft CRM system (version 8.8, mainly marketing and sales modules), including issue review/Evaluation, solution development, testing and migration;
- Take care of customer communication and account management;

Project 3

2010/04 -- 20010/12 : KIA CRM system implementation (Siebel)

Advisory and Supervision Manager

Description
- Acted as the project advisor, providing consultancy service to KIA ensures the project success;
-Siebel CRM training to business users;
-Monitor and Control the implementation process;
-Review and approve project plan and deliverables;

Project 4

2009/05 -- Present : CRM consulting and outsourcing for EVIAN China.

Project Leader

Description
Design member club (Strategy, Rules, Segmentations, Offers, Communication Plan, points and benefits etc);
CRM system development
Set up a call center for order-taking hotline and member services.
Responsibilities:
As sales manager and project leader, taking care of the overall pitch process and project setup.

Project 5

2009/05 -- Present : CRM outsourcing services for Accord Business Consulting.

Account Manager and Project Leader

Description
Reaching super market club members by DM & SMS campaigns then help the client to sell credit cards though Inbound and Outbound calls
Responsibilities:
Act as the account manager and project manager to understand the client's needs and delivery the services.

SUBBIAH DHARMAR

ORACLE
Certified Professional

SENIOR PEOPLESOFT ADMINISTRATOR (ADMIN) / ORACLE DBA CONSULTANT

Subbiah is a Senior Consultant with over **22** years of professional experience in the IT Industry (public and private sectors) as an **Oracle DBA, PS Admin, Architect, Upgrade and Infrastructure/Network Specialist** in Managed Hosting and in-house environments.

As a **PeopleSoft DBA, Architect, Admin** and **Upgrade Specialist**, he has hands-on experience in PeopleSoft Installations, PeopleSoft Admin, Upgrades, Tuning, PIA Configurations and Load Balancing and Production and Project (implementation and upgrade) Support. He has configured and used PeopleSoft **Change Assistant** extensively for PeopleTools/Application Upgrades 9, 8 and 7, PeopleSoft Patches and Fixes, Service Packs and **TAX Updates**.

Subbiah manages PeopleSoft production and development environments (HCM, Financials, Student Admin, ELM, EPM, Portal, CRM and Distribution), Data Warehouse, Web and Client/Server Applications. He has extensive knowledge and experience in Migrations and Managing **Offsite Managed Hosting.**

Subbiah is a Certified Oracle DBA (**OCP**) with excellent experience as an **Oracle 11g, 10g, 9i, 8x and 7x DBA and PeopleSoft DBA (Oracle/SQL Server)** in Installation, Administration, Tuning, Maintenance, RAC, RMAN and Upgrade of Oracle 7x, 8x, 9i, 10g and 11g Databases on UNIX (HP, HP True64, SUN, AIX and OpenVMS), Red Hat Linux and Windows platforms.

Subbiah has involved in assessing customer requirements, recommending suitable options and providing technical customer support. He provides rapid responses to problems, determine next steps and provide remedial action plans to resolve the problem, recommending and implementing industry best practices.

Subbiah has excellent analytical, problem solving, communication and interpersonal skills and He works well with individuals at all levels, with great leadership and has mentoring abilities. He coordinates meetings, assign and follow-up on tasks and provides status reports to management.

Subbiah has designed, configured and installed Oracle RDBMS, created databases, demonstrating business analysis, data modeling and database design, and provide 24/7 production DBA /PeopleSoft Admin support (both on-site and off-site).

Subbiah has experience in migrating/upgrading databases from Oracle 7x to 8x, 8i, 9i, 10g and 11g and He has administered multiple database instances enterprise-wide on Cross-Platforms, Client/Server and Web Applications.

Subbiah has excellent skills in database backup and recovery, testing all the disaster recovery scenarios recommended by Oracle and designing and implementing database backup plans using RMAN, custom scripts and other third-party backup tools.

Subbiah has proficient in Oracle Database Tuning and PeopleSoft Application Performance Tuning with OEM and Trace and has performed database monitoring and reorganization for better performance.

SUMMARY OF PROFESSIONAL EXPERIENCE

CLIENT NAME	PROJECT TYPE	SOFTWARE VERSION	MODULES	ROLE
City Colleges of Chicago, IL	Production Support/Upgrade	Student Admin 8.x; HCM8.x; FIN8.9; Oracle 10g; PT8.22 & 8.48; WebLogic 5.x & 8.x	True 64 Unix (HP Alpha Servers)	Oracle DBA and PeopleSoft Admin
Chicago Public Schools, IL	Implementation	Oracle11g; Oracle10g (10.2.0.4); OEM; HCM; CRM; PORTAL 8.9 & 9.1; ELM 9.0; PT8.47; PT8.49; WebLogic 8 & 9	HCM, ELM, CRM & Portal	Oracle DBA, PeopleSoft Admin and Infrastructure Lead
IBM, CA	Implementation	HCM 8.8; FSCM 8.8; CRM 8.8; EPM 8.8; Portal 8.4; WebLogic 8.1; Oracle 9i		Oracle DBA, PSADMIN & Infrastructure Lead
City Colleges of Chicago, IL	Production Support/Upgrade	Student Admin 8.x; HCM8.x; FIN8.9; Oracle 10g; PT8.22 & 8.48; WebLogic 5.x & 8.x	True 64 Unix (HP Alpha Servers)	Oracle DBA and PeopleSoft Admin
IBM (Corio, Inc.), CA	Implementation, Upgrade and Support	HCM 8.9; CRM 8.8; EPM 8.8; FSCM 8.4; Portal 8.4; WebLogic 5.1, 6.1 & 8.1; Informatica 6.1; Cognos; Oracle 8x, 9i & 10g; SQL Server 2K		Oracle DBA, PSADMIN and Upgrade Specialist
Loyola University	Implementation	Student Admin & HRMS; Oracle9i; WebLogic 5.1 & 8.1	Student Admin & HR	DBA/PIA Tuning Specialist
Verizon, NY	Upgrade	FSCM 8.4; Oracle 9i	ALL FSCM Modules	DBA/Upgrade Specialist
HEB, TX	Upgrade, Implementation	Oracle 9i; HRMS 8.3 (80,000 Employees); WebLogic 5.1 & 6.1	HR, Base Benefits, Payroll, Recruit, eRecruit	Oracle DBA, PSADMIN and Upgrade Specialist
City of Tallahassee, FL	Upgrade	Oracle 8.x; HRMS 8.3; WebLogic 5.1 & 6.1	HR, Base Benefits, Payroll	Oracle DBA, PSADMIN and Upgrade Specialist
Northwest community Hospital, IL	Upgrade	Oracle 8.x & 9.x; HRMS 8.3; FSCM 8.4; WebLogic 5.1 & 6.1; True 64 Unix (HP Alpha Servers)	HR, Payroll, Time & Labor, General Ledger, Accounts Payable	Oracle DBA, PS ADMIN, Technical Architect True 64 Unix (HP Alpha Servers)
CAN Insurance, IL	Implementation, Production Support	Oracle7.x & 8.x; Financials	GL, AM & AP	Senior Consultant (Oracle DBA), PS Admin
Whitman-Hart, IL	Implementation	HRMS, EPM & Dist	HR, Payroll, GL & OM	Senior Consultant (PeopleSoft /Oracle DBA)
McLeod USA, IL	Implementation	Oracle	Oracle	Senior Oracle DBA
IBM, Atlanta,GA	Implementation	Training Administrator	TA	Oracle DBA
State of Bahrain	Implementation	Sr. System Analyst	Custom Apps	Oracle DBA

DETAILED PROFESSIONAL EXPERIENCE

City Colleges of Chicago, Chicago, IL **11/12 – current**
PeopleSoft Architect, Admin & DBA **01/05 – 11/05**

Environments - HP Alpha True 64 UNIX, PeopleSoft HCM 8.x, Financials8.x, Student Admin8.x

- Senior Peoplesoft Technical Staff for Infrastructure/Architecture/Admin and Oracle DBA for HCM, Financials and Student Admin Applications
- Installed and configured PeopleSoft HCM, FSCM and Student Admin
- Performed all PS Admin and DBA activities, including bundles, patches and tax updates
- Developed documents for standards and procedures

PeopleSoft Oracle DBA (Oracle 8x, 9x and 10g)

- Installed Oracle RDBMS
- Created database instances
- Cloned databases
- Sized and tuned production databases
- Developed and implemented backup and recovery procedures
- Tested all database disaster recovery procedures
- Involved in system stress testing using Mercury software

PS Admin/Web Server Admin

- Installed, configured, tuned and load balanced PeopleSoft PIA components
- Supported day-to-day operation of PeopleSoft environments
- Applied patches and bundles
- Upgraded PeopleTools
- Managed and tuned web servers, application servers and databases for maximum performance
- Wrote and automated UNIX shell scripts for backup and other batch jobs
- Supported developers and data conversion teams

Chicago Public Schools, Chicago, IL **12/05 – Present**
Oracle DBA, Infrastructure Lead and PeopleSoft Admin & Architect

Environments - SUN SPARC UNIX, Red Hat Linux, Oracle 10g and 11g, OEM, PeopleSoft HCM 8.9, ELM 9.0. Portal 9.1, TALEO and KRONOS

PeopleSoft Oracle DBA

- Installed/Upgraded Oracle10g, 11g, Tuxedo Application Server, PT8.47, PT8.49, PT8.51, PT8.52, HCM 8.9, Portal 9.1, ELM 9.1
- Created Oracle database instances for PeopleSoft applications
- Cloned databases
- Developed and implemented backup and recovery procedures
- Installed and created Oracle 11g RAC instances for KRONOS, DS2 and IVR applications
- Developed and implemented RMAN backup and OEM for DBA management
- Use OEM for various DBA activities

PS Admin (Oracle RDBMS, App Server, Web Server & Process Scheduler)

- Installed, configured, tuned and load balanced PeopleSoft PIA components
- Configured Single Sign On and Integration Broker
- Infrastructure lead for PeopleSoft environments

KRONOS

- Architected performance oriented system by evaluating space, memory, network firewall rules and OS requirements

Managed Hosting

- Migrated/Implemented PeopleSoft environments (over 25) to off-site managed hosting service - Cedar Crestone (CCI)
- Work on contracts, on-going support and act as client representative
- Work with CCI and CPS network on various network configurations, failover testing, certificates and licenses
- Attend weekly meetings to identify and resolve hosting issues with client service manager

Other Tasks

- Worked on setting up Data Guard and RAC environments
- Tuned database, PIA and PeopleSoft online and batch processes
- Configured SSO between PeopleSoft and other applications
- Managed 38 Oracle 10g database instances and supported Oracle 9i databases for Kronos application
- Responsible for database management, PeopleSoft architecture and PS Admin
- Use PeopleSoft Change Assistant extensively for tax updates, bundles and upgrades
- Upgraded Oracle 9.2 to 11g database for Kronos application
- Provide DBA support for day-to-day operation of PeopleSoft, DS2, IVR and Kronos applications
- Manage and tune web server, app server and database for maximum performance
- Refresh and clone databases
- Involved in stress testing
- Define standards for project migration, interfaces, database names and PIA
- Recommend and follow industry best practices for PeopleSoft implementations
- Coordinate meetings, prepare agendas before meetings and take minutes after meetings
- Manage project tasks and provide weekly status reports
- Support consultants and employees

IBM (CORIO, Inc. - ERP Hosting Co.), San Carlos, CA **10/03-12/04**
PeopleSoft Architect, Admin & Oracle/SQL Server DBA

PS Admin, PS DBA (Oracle 8x, 9x, 10g & SQL Server 2000) & Upgrade Specialist

- Worked on-site/Telecommuted to support clients all over USA and in-house support to their INDIA office in managed hosting setup.
- Configured Report Repository using HTTP and FTP
- Designed, developed and implemented backup and recovery procedures
- Copied databases and set up new PeopleSoft environments
- Architected PeopleSoft environments
- Installed, load balanced, configured and administered PeopleSoft PIA in multi-tiered environments
- Installed, configured and administered PeopleSoft EPM and Informatica 6.1
- Performed full upgrades of Financial and HR modules (7.5x to 8.8, 8.4 and 8.3)
- Downloaded and applied PeopleSoft bundles and patches using Change Assistant
- Wrote batch scripts for automation of job schedules on Unix and Windows environments
- Performed tax updates
- Worked on trouble shooting and performance tuning
- Ran compare reports, DDDAUDIT, SYSAUDIT and Review Reports
- Designed Security, Portal Security, Backup & Recovery Strategy, Patch Strategy and Procedures
- Cloned databases
- Managed cluster environments
- Created HR roles and customizations

- Integrated PeopleSoft EPM, HCM and FSCM with PeopleSoft Portal
- Created and modified Data Mover Scripts before executing

Verizon, New York, NY **01/03 – 10/03**
PeopleSoft Admin & Oracle DBA

- Provided PS Admin and Oracle 9i DBA support for PeopleSoft upgrade project
- Installed Oracle
- Created, migrated, backed up and restored database instance
- Coordinated with project team members
- Performed PeopleSoft upgrade from 7.5 to 8sp2
- Installed and created PeopleSoft Oracle databases and configured PIA
- Analyzed and planned for data conversion and merge
- Performed weekly migrations
- Applied bundles and patches
- Upgraded PeopleTools and application (initial & move to production) using Upgrade Assistant

HEB Supermarkets, San Antonio, TX **6/02 – 12/02**
PeopleSoft 8 Oracle DBA

PeopleSoft 8 Upgrade Specialist/Oracle DBA

- Configured and tuned PIA
- Installed Oracle and created multiple PeopleSoft 8 databases (HRMS, EPM and Financials)
- Cloned database and applied patches and fixes
- Involved in converting PeopleSoft data from Informix to Oracle9i
- Executed backup and recovery using RMAN
- Performance tuned PeopleSoft HRMS database
- Successfully completed the HRMS (HR, Payroll, Ben Admin, Pension Admin, Recruitment Workforce) upgrade from 7.5 to 8.3 (initial upgrade and move to production)
- Created and modified PS Query and Crystal Reports
- Worked on implementing eRecruitment Resume Processing
- Worked on financial upgrade plan from 7.5 to 8.41
- Set up report distribution, PS Admin, Web, App and Batch Servers for optimal performance and risk reduction
- Performed PeopleTools and Application upgrades using PeopleSoft Upgrade Assistant
- Experienced in all aspects of upgrade process
- Applied updates, fixes and tax updates
- Installed and configured Web Server, App Server (load balancing, fail over, etc.), Process Scheduler and Report Servers
- Involved in customizing Security upgrades and providing workarounds to meet the business process requirements
- Involved in problem solving and trouble shooting

City of Tallahassee, Tallahassee, FL **03/02 – 6/02**
PeopleSoft 8 DBA/Upgrade Consultant

Oracle DBA, PeopleSoft 8 HRMS Upgrade Specialist & Technical Lead

- Responsible for HRMS (HR, Payroll, Ben Admin, Pension Admin, T&L) upgrade from 7.5 to 8.3
- Involved in Technical Project Management
- Installed Oracle8i and created PeopleSoft 8 databases
- Performed PeopleTools and Application upgrades using PeopleSoft Upgrade Assistant
- Experienced in all aspects of upgrade process

- Installed and configured Web Server, Application Server, Process Scheduler and Report Servers

Northwest Community Hospital, Arlington Heights, IL **12/01 – 7/02**
PeopleSoft DBA/Technical Architect/Upgrade Consultant

Project: PeopleSoft Upgrade from Rel. 7 to Financial 8SP2 and HRMS 8.3

PeopleSoft 8 Upgrade Architect & Oracle DBA

- Architected PS8 environments for Financials & HRMS
- Recommended suitable infrastructure changes
- Managed Technical Project
- Installed and configured Oracle and PeopleSoft 8 software
- Created PeopleSoft 8 databases (demo, development and production)
- Migrated databases from one server to another
- Developed and implemented backup, refresh and recovery procedures and capacity planning for data storage and growth
- Applied database and application patches
- Performed PeopleTools and Application upgrades using PeopleSoft Upgrade Assistant
- Set up Web Server, Application Server, Process Scheduler and Report Servers under physical N-Tier environment
- Upgraded PeopleSoft HCM & FSCM from 7.x to 8x
- Provided on-going PeopleSoft support

CNA Insurance, Chicago, IL **05/98 – 12/01**
Senior Consultant (PeopleSoft & Oracle DBA)

Oracle/PeopleSoft Database Admin for GL, AM, AP & PO

- Set up, maintained and administered multiple Oracle instances for implementation of multiple PeopleSoft Financials modules (Rel. 5, Rel. 7, 7.5 and Rel. 8)
- Created new instances of Oracle databases
- Performed PeopleSoft Data Management functions
- Installed and configured PeopleSoft 7 and PeopleSoft 7.5, including Application Server, Process Scheduler, JOLT and Tuxedo
- Involved in applying PeopleSoft patches
- Provided DBA support for upgrade of GL Module from PeopleSoft Rel. 5 to Rel. 7
- Responsible for performance tuning of the Databases and Application SQL
- Developed backup/recovery strategies, which included performing Cold Backups, Hot Backups and Exports
- Involved in the configuration of RMAN, EBU and DBBreez
- Involved in planning and maintaining PeopleSoft GL warehouse database (1.5 terra bytes)
- Worked on extremely large databases
- As part of the Oracle DBA rotation team, provided 24x7 support to the production applications involving Oracle databases
- Administered multiple database instances enterprise-wide on cross platforms and Client/Server Applications
- Created and maintained project plans, quality assurance plans, configuration management plans, test plans, tracking project progress and reporting the status to the client project manager

P2P-SmartSource Project
PeopleSoft Architect & Application DBA

This project used the latest Internet Technology Software, PeopleSoft 8 Portal, Payables, Purchasing, Ariba Buyer and T&E.

- Installed PeopleSoft 8 AP and Portal applications and created demo, development and production PeopleSoft 8 databases
- Configured PeopleSoft 8 PIA architecture in logical and physical N-Tier environments
- Worked on database sizing and space projections
- Installed and configured web servers (WebLogic, Apache, Netscape) and PeopleSoft application servers
- Designed server architecture and handled space management
- Performed PeopleSoft 8 upgrades and applied patches using PeopleSoft 8 Upgrade Assistant, Change Assistant and Data Mover
- Upgraded PeopleSoft 7.5 AP database to release 8 SP2
- Built P2P warehouse database
- Installed and configured COBOL, SQR and Tuxedo
- Coordinated stress and performance tests

PeopleSoft 8 GL Project

- Architected PeopleSoft environment and performed PeopleSoft DBA work
- Installed and configured PeopleSoft 8 GL modules and created PeopleSoft databases
- Performed PeopleTools7 and 8 upgrades - application updates from 7.00 to 7.02 and to PeopleSoft 8
- Ran and analyzed upgrade compare reports
- Worked on PeopleSoft database cleanup by running DDDAUDIT and SYSAUDIT
- Involved in project planning and estimation

PeopleSoft Technical Support

- Provided PeopleSoft 7, 7.5 & 8 technical support to financial applications
- Installed, configured and tuned Web Server and Application Server
- Managed space and space projection
- Successfully coordinated and led the Oracle 8.0.5 to 8.1.7 upgrade project

Whitman-Hart, IL **08/97 – 05/98**
Senior PeopleSoft Consultant /Oracle DBA

Purchase Order System (PeopleSoft) at UHC

- Responsible for design and development of Purchase Order System on PeopleSoft 6.0 (Financials, HR & Distribution) under Sun SPARC Station (SunOS 5.5.1), PCs, NT4.0, Oracle 7.3.2 and Enterprise Manager Environment
- Installed Oracle 7.3
- Created PeopleSoft database
- Performed daily DBA duties for five databases,
- Worked on performance monitoring, tuning and space recommendations for disk usage on the PeopleSoft applications
- Managed security in Oracle and PeopleSoft

- Provided support to PeopleSoft development team in synchronizing all database environments

Consolidated Communications Directory, McLeod USA **3/96 – 8/97**
Senior Oracle DBA

ADS SYSTEM & DPS PROJECT

Automated Directory System that published Yellow Pages. Directory Publishing System is Client-Server Integrated System to automate all the functions of CCD.

- Installed and upgraded Oracle products (Oracle7.x)
- Maintained Oracle products and application systems as DBA
- Worked on database sizing, space management and defragmentation
- Created logical and physical design and database using Designer 2000 case tool
- Controlled user access to the database
- Enrolled users with specific privileges/roles
- Altered and dropped user privileges/roles
- Created specific roles for different groups of users and assigned specific system and object privileges to user groups
- Designed and implemented strategies for database backup and recovery
- Used Oracle DBA tools, Adhawk Monitor, Spacer, SQL Lab
- Worked on performance tuning SQL (trace, explain plan, utlbstat/utlestat, optimizer), instance tuning, storage management (index, rollback, redo logs) and monitored database

IBM (Consultant), Atlanta, GA **7/94 - 3/96**
Database Admin/Systems Analyst

Training Admin System

Training Management Software at IBM to manage all the training activities and training resources. Apart from enrolling and scheduling courses, functions such as operators, instructors, equipment and rooms are treated as resources that can also be scheduled.

Environments - RS6000, PS2, AIX-Unix 3.2, OS/2, Oracle, DB2, ODBC, GUPTA-SQL-API and Crystal Report Writer

- Normalized up to 3rd normal form for Data Modeling
- Created physical design and database
- Modified database structure
- Controlled user access to the database
- Enrolled users with specific privileges/roles
- Altered and dropped user privileges/roles
- Created specific roles to different groups of users and assigned specific system and object privileges to user groups
- Worked on database backup and recovery and data load activities
- Performance tuned SQL (trace, explain plan, optimizer)
- Managed storage
- Monitored database using SQL DBA and Dynamic Statistics

Ministry of Housing, State of Bahrain **12/91 - 7/94**
Senior Systems Analyst

- Performed DBA activities
- Carried out a feasibility study
- Proposed suitable system and methods
- Provided functional specifications and design specifications
- Prepared reports
- Worked on system involving customization of various system operational activities, such as routine backup and recovery

ROLTA LTD, India **3/89 - 12/91**
Technical Manager

Responsible for system development and technical support in the areas of Oracle and Informix. Managed a team of 13 technical analysts and interacted with various clients.

DEPARTMENT OF SPACE, India **9/87 - 2/89**
Senior Scientist

Responsible for managing the Program Planning and Evaluation Department (PPED) and involved in various scientific projects.

HARDWARE/SOFTWARE

Databases: Oracle 11g, 10g, Oracle 9i, 8i, 8x and 7x, Informix, SQL Server and Access

ERP: PeopleSoft (9.x, 8.x, 7.5, 7 and 6), HCM, FSCM, SA, EPM, Portal, CRM and Distributions

DBA Tools: Oracle Enterprise Manager, Precise and TOAD

Platforms: UNIX (HP, SUN, AIX), True 64 (HP Alpha), Linux (Red Hat) and Windows

Software & Languages: PeopleTools 8.X, 7.5,7.0 & 6.0, WebLogic, Apache, Tuxedo, Data Mover, Import Manager Apps Designer, Application Engine, SQR, Query, Crystal Reports, Cobol, Silverstream, SQL, PLSQL, Shell scripts, Visio & MS office, TOAD, Vertex, Mohomine

EDUCATION

- Ph.D. (Computer Science) - Indian Institute of Technology, Kharagpur, India
- M.S. (Mathematics) - University of Madras, India
- Financial and Managerial Accounting - Harper College, Palatine, IL
- PeopleSoft Accounts Payable Course - PeopleSoft Corporation

ıdan Kumar

Skills

PeopleTools (6, 7, 7,5, 8.4, 8.49, 8.50,8.51 , 8.52)
PeopleSoft HCM (9.1,8.9, 8.8,7.5)
CRM (8.8, 8.9)
ELM(8.8,9.0,9.1)
Portal(8.8, 8.9, 9.1)
Xml Publisher
PeopleSoft Test Framework.
SQL
SQR
PeopleCode
XML/XSL
InfoPump
HTML/XHTML
Java
JavaScript
Shell scripting

MySQL
Oracle

;JECTIVE

king challenging opportunities in PeopleSoft HCM, ELM, Portal and CRM.

PERIENCE

opleSoft Consultant

August 2007 – Present

cago Public Schools, Chicago, Illinois

ate, update, and maintain site pages for SportsIllustrated.com and SIKIDS.com, using CSS, HTML, aScript, and XML/XSL. Coordinate with producers and designers for major site changes. Maintain ernal tools for managing site structure, news data, and sports photos, using Perl and Java. Work h third-party providers to ingest and integrate external sports data, and generate content feeds use on partner web sites. Assist with design efforts for site pages, content archival, photo leries, video features, mobile WAP site, and third-party gadgets. Provide technical support for ability issues and critical site problems, as needed.

chitect of numerous applications at CPS, Tenure tracking system, Union Contract implementations · Fiscal Year 07 & 13, Consulting Teacher Application, Summer School process, Charter School plication for No Child Left Behind, Race and Ethnicity per Illisnois State Board of Education ndards, are the prominent.

ayed key role in HCM , CRM, ELM implementations and upgrades.

eopleSoft Consultant

June 2007 – July 2007

egent Health, Austin, Texas

ad designer and developer for web sites and promotional media for small businesses. Utilized ntemporary design to create concise web sites for specific client needs. Site creation included use CSS, HTML, JavaScript, MySQL, Adobe Flash, Swish Max, PHP, online payment features, and form ocessing. Created and assembled web graphics, including logos and advertisements. Designed nail blasts and newsletters for site launches and event announcements.
rtfolio available at ***http://www.yourdomain.com/portfolio***.

eopleSoft Consultant/Architect

May 2006 – May 2007

ountrywide Home Loans, Pasadena, California

ead designer and developer for web sites and promotional media for small businesses. Utilized ntemporary design to create concise web sites for specific client needs. Site creation included use f CSS, HTML, JavaScript, MySQL, Adobe Flash, Swish Max, PHP, online payment features, and form

:essing. Created and assembled web graphics, including logos and advertisements. Designed
ıil blasts and newsletters for site launches and event announcements.
folio available at ***http://www.yourdomain.com/portfolio***.

›pleSoft Consultant/Architect August 2004 – May 2006
ntrywide Home Loans, Pasadena, California

d designer and developer for web sites and promotional media for small businesses. Utilized
temporary design to create concise web sites for specific client needs. Site creation included use
:SS, HTML, JavaScript, MySQL, Adobe Flash, Swish Max, PHP, online payment features, and form
cessing. Created and assembled web graphics, including logos and advertisements. Designed
ail blasts and newsletters for site launches and event announcements.
:folio available at ***http://www.yourdomain.com/portfolio***.

ıd Technical Analyst, I/T Specialist April 2004 – July 2004
sion People, Atlanta, Georgia

rked on team to develop next-gen prototype for IBM Intranet web portal, integrating several
acy sales/forecasting tools into a single application. Created Java-based portlets and Java Server
;es (JSPs) to build a unified user experience. Used WebSphere Content Manager suite to
›lement a document catalog, for storing and tagging thousands of user-generated reports. Used
/ Internal site standards for interface coding. Extensive use of Java, AJAX/JavaScript, SQL, and
ix shell scripting required. Assisted with proof-of-concept reviews and stress testing.

opleSoft Consultant October 1998 – March 2004
partment of National Defense, Ottawa, Ontario

mary technical contact for critical issues for a global IBM Intranet application used for
portunity management and global sales forecasting. Served as lead over team of six analysts
ated in other countries. Tasks included resolving technical failures in a timely manner,
tomating application monitoring tools, and providing technical expertise for application upgrades.
:pared technical training and process documentation for team, to aid with day-to-day support
ues. In-depth knowledge of AIX systems, DB2 databases, and WebSphere products required.

:search /Analyst May 1997 – September 1998
ıtional Institute of Materials and Chemical Research, Tsukuba, Ibaraki

rformed software and server support for an IBM Internal web site for the North and South
nericas geographies. Assisted with critical system outages, software upgrades, and capacity
ınning. Coordinated with business executives, software experts, help desks, and data source
ams in a 24x6 availability environment. Support tasks involved work with AIX RS/6000 servers,
32 databases, Web Sphere products, and Brio Enterprise reporting tools.

:cturer August 1994 – August 1996
ıwar-Ul-Uloom College, Hyderabad, AP

eated and maintained site pages for IBM Southeast Human Resources recruiting team, using

ML and web graphics. Developed animated presentations for use at college recruiting fairs.
omated SQL reporting for employee productivity metrics and billing rate optimization.

UCATION

olecular Orbital Simulations, PhD
nalia University, Hyderabad, India

ysical Chemistry, Master of Science
nania University, Hyderabad, India

athematics and Physical Sciences, Bachelor of Science
nania University, Hyderabad, India

Monarch Consulting

952 Willowood Lane
Atlanta, GA 30331
(678) 570-5383

Tracey Geary

Senior Consultant

Summary

Over 10 years of experience with the implementations and upgrades of PeopleSoft applications. Consulting support includes troubleshooting, development, customizations, integration, interfaces, monitoring and performance tuning, quality assurance, security and application technical support. I am a proven consultant with a wide range of experience in demanding environments and industries.

Products and Technical Skills

- Oracle Database Administration
- MS SQL Server Administration
- MS SQL Server Development
- Sybase Database Administration
- Windows Administration
- PeopleSoft Portal
- PeopleSoft Campus Solutions
- PeopleSoft Financials
- PeopleSoft HCM
- PeopleSoft EPM
- PeopleTools
- PeopleCode
- PS/nVision
- Crystal/Query
- SQL/SQR
- Upgrade Assistant
- Change Assistant
- Weblogic Web server
- US Citizen
- Application Messaging
- Integration Broker
- PeopleSoft Security
- HRMS/SCM/FDM Development
- Application Engine
- General Ledger
- Role Based Security
- Portal Packs
- Department Security Tree
- Workflow
- Campus Solutions
- Campus Solutions Security
- Dynamic Security

Summary

Over 10 years of experience with development, implementations, and upgrades of PeopleSoft applications. Consulting support includes troubleshooting, development, customizations, integration, interfaces, monitoring and performance tuning, role based security, quality assurance, and application technical support. I am a proven consultant with a wide range of experience in demanding environments and industries.

Professional Experience

PeopleSoft Security, Workflow, and Portal Lead – Campus Solutions

(April 2012 – Present) Tufts University, Boston, MA

I provide PeopleSoft technical expertise for Tufts University. Successfully implemented and integrated PeopleSoft Enterprise Portal 9.1 with Campus Solutions (Student) 9.0 with dynamic security.

- Performed security design for CS.
- Performed portal design (Look and Feel).
- Create custom XSLT.
- Create pagelets
- Technical Security Lead
- Developed roles and permission list.
- Developed complex role queries.
- Dynamic assignment of security.
- Develop Security tree.
- Designed row level security for Academic Structure.
- Integration Broker specialist.
- Troubleshoot integration, security, and portal issues.
- Non Federated Portal integration with Campus Solutions.
- PeopleCode development.
- Develop custom Integration Broker Service Operations.
- Integration Broker specialist.

PeopleSoft Security Lead (April 2011- Feb 2012) Ingersoll-Rand, Davidson, North Carolina

I provide PeopleSoft Security expertise for Ingersoll-Rand. I have successfully implemented dynamic security for all company roles in a PeopleSoft 9.x environment.

- Security Lead
- Fit-Gap analysis
- Security design
- Department Security Tree design
- Implement Security by Permission Lists
- Implement Security by Department Tree
- Custom Roles and Permission list
- Design and build complex role queries
- PeopleCode development
- Custom reports
- Integration Broker specialist

PeopleSoft Portal Lead (April 2011 – Oct 2011) Corning, Corning, New York

I provide PeopleSoft technical expertise for Corning. Successfully implemented and integrated PeopleSoft Enterprise Portal 9.1 with HCM 9.1 with dynamic security.

- Perform Portal design
- Perform Branding and "Look and Feel" configuration
- PeopleCode development
- Create customized pagelets

Proprietary and Confidential

PeopleSoft Portal Lead (March 2011 - June 2011) University Of Colorado, Boulder, Colorado

I provide PeopleSoft technical expertise for the university. Successfully implemented and integrated PeopleSoft Enterprise Portal 9.1 with HCM 9.1 with dynamic security.

- Perform Portal design
- Perform Branding and "Look and Feel" configuration
- PeopleCode development
- Create customized pagelets.

PeopleSoft Security, Workflow, and Portal Lead - Campus Solutions, HCM, EPM, and Financials

(Jan 2010 - April 2011) Grant MacEwan University, Edmonton, AB Canada

I provide PeopleSoft technical expertise for Grant MacEwan University, in partnership with IBM. Successfully implemented and integrated PeopleSoft Enterprise Portal 9.0 with HCM 9.1, Financials 9.0, EPM 9.1, and Campus Solutions (Student) 9.0 with dynamic security.

- Performed security design for HCM, FDM, EPM, and CS.
- Performed portal design.
- Technical Security Lead
- Developed roles and permission list.
- Developed complex role queries.
- Dynamic assignment of security.
- Develop Security tree.
- Designed row level security.
- Integration Broker specialist.
- Design Workflow.
- Troubleshoot integration, security, and workflow issues.
- Non Federated Portal integration with EPM, Campus Solutions, FDM, and HCM.
- PeopleCode development.
- Workflow for eProcurement, Travel and Expenses, and HR.
- Develop custom Integration Broker Service Operations.
- Integration Broker specialist.
- Time and Labor Security
- Time and Labor Dynamic Groups

PeopleSoft Enterprise Portal - Technical Lead/Enterprise Portal Developer/Integration Specialist

(Feb 2008 - Dec 2009) Credit Suisse, Research Triangle Park, NC

I provide PeopleSoft technical expertise for Credit Suisse, a large investment bank, in partnership with IBM. Successfully implemented PeopleSoft Enterprise Portal 9.0 and created custom pagelets and integration with CRM 9.0 and HCM 9.0.

- Installed multi-language PeopleSoft Enterprise Portal 9.0
- Performed portal design
- Technical Lead
- PeopleSoft Pagelet development

- Portal 9 Branding
- Enterprise Portal "Look and Feel": Header, Footer, Multi-Language, page, Stylesheet development
- HRMS application integration with Enterprise Portal (**Non-Federated**)
- Single Signon and Active Directory integration. Public Key Infrastructure (PKI)
- Web Libraries and Signon Peoplecode development
- Application Package Development
- Search Index development
- Web Service integration
- Java Pagelet development
- Content Management administrator
- Implemented PeopleSoft Portal Packs for HRMS and CRM
- Configured Integration Broker for synchronization of roles, user profiles, Resource Finder information, and custom messages
- Weblogic web server 8.x administration
- On going technical support
- Ongoing technical support for portal and applications
- Design and implement security, permission lists and roles.
- Dynamic role PeopleCode
- Application Engine Development
- Performance monitoring and tuning

PeopleSoft Enterprise Portal – Technical Lead/Enterprise Portal Developer (Sept 2007-Feb 2008) Ocean Bank, Miami, FL

I provided PeopleSoft technical expertise for Ocean Bank, Successful implementation of Peoplesoft Enterprise Portal 8.9 and migration of legacy content to Enterprise Portal.

- Installed multi-language PeopleSoft Enterprise Portal 8.9
- Performed portal design
- Technical Lead
- PeopleSoft Pagelet development ,Content Management, Portal 8.9 Branding, and Enterprise Portal "Look and Feel.
- Create separate portal registries for core users and self-service employees.
- HRMS application integration with Enterprise Portal (**Non-Federated**)
- Single Signon and Active Directory integration. PeopleSoft Directory Interface(PDI)
- Implemented PeopleSoft Portal Packs for HRMS.
- Configured Integration Broker for synchronization of roles, user profiles, and Resource Management information
- Weblogic web server 8.x administration
- On going technical support
- REN Server Administration
- PeopleSoft PeopleTools upgrades
- PeopleSoft patches and bundles via Change Assistant
- Ongoing technical support for portal and applications

- Design and implement security, permission lists and roles.
- Performance monitoring and tuning
- Create environments in Windows 2003.

PeopleSoft Upgrade Specialist/PeopleSoft Administrator (Oracle Database) Financials (Jan 2007 - Sept 2007) John C. Lincoln Hospital, Phoenix, AZ

I provide PeopleSoft technical and upgrade expertise for the John C. Lincoln Hospital currently upgrading version 7.5 to 8.9 in a 2 step upgrade. My assistance is needed to perform the upgrade, provide PeopleSoft and Oracle database administration.

- Upgrade copy of production database from 7.5 to 8.8 then to 8.9.
- Create Demo and Test environments.
- Review compare reports for customizations
- Reapply customizations
- REN Server administration
- Assess upgrade risks and benefits.
- Create custom SQRs, Component Interfaces, Application Engine, and Integration Broker Messages.
- PeopleCode
- PeopleSoft Directory Interface setup.
- Design and implement security, permission lists and roles.
- Data conversion.
- On going technical support for PeopleSoft applications
- PeopleSoft Administration
- Resolve issues with data conversion
- Troubleshooting
- Application of bundles via Change Assistant.
- Oracle Database Administration
- Performance tuning
- Upgrade to Oracle 10g 64bit.
- Backup and recovery.
- Integration specialist.

PeopleSoft Upgrade Specialist/PeopleSoft Administrator (Oracle Database) Financials (Oct 2006 - Feb 2007) Lockheed Martin, King of Prussia, PA

I provide PeopleSoft technical and upgrade expertise for the LockHeed Martin currently evaluating version 8.9. My assistance is needed for a path finding study.

- Upgrade copy of production database from 8.0 SP2 to 8.9.
- Create Demo environments.
- Review compare reports for customizations
- Reapply customizations
- Assess upgrade risks and benefits.
- Create custom SQRs, Component Interfaces, and Integration Broker Messages.
- PeopleSoft Directory Interface setup.
- Design and implement security, permission lists and roles.

- Assist in conversion of data into PeopleSoft 8.9.
- On going technical support for PeopleSoft applications
- PeopleSoft Administration
- Application of bundles via Change Assistant.
- Integration specialist.

PeopleSoft Technical Developer/PeopleSoft Administrator (Oracle Database) HRMS and Campus Solutions (April 2005 – Oct 2006) University Of Texas MB, Galveston, TX

I provide PeopleSoft technical and functional expertise for the University of Texas Medical Branch currently deploying version 8.9.

- Create custom SQRs, Component Interfaces, and Integration Broker Messages for Benefits, Payroll, Grants, and Accounts Payables Modules.
- PeopleSoft Directory Interface setup.
- Design and implement security, permission lists and roles.
- Assist in conversion of legacy data to PeopleSoft.
- On going technical support for PeopleSoft applications
- PeopleSoft Administration
- Provide fit-gap analysis for Time and Labor and Talent Acquisition.
- Application of bundles via Change Assistant.
- PeopleSoft upgrade from 8.8 to 8.9
- Integration of HCM with FIN through Integration Broker.
- Integration specialist.
- Build PeopleSoft environments in AIX and Windows Server 2003

PeopleSoft Enterprise Portal – Technical Lead/Enterprise Portal Developer (Oracle Database) (Nov 2003-April 2005) Waste Management, Houston, TX

I provide PeopleSoft technical expertise for industry leading waste disposal company, Waste Management. Successfully upgraded Peoplesoft Enterprise Portal 8.4 to 8.8 and migrated legacy content to Enterprise Portal.

- Installed multi-language PeopleSoft Enterprise Portal 8.8
- Performed portal design
- Technical Lead
- PeopleSoft Pagelet development ,Content Management, Portal 8.8 Branding, and Enterprise Portal "Look and Feel.
- SCM, FDM, and HRMS application integration with Enterprise Portal (**Non-Federated**)
- Single Signon and Active Directory integration. PeopleSoft Directory Interface(PDI)
- Implemented PeopleSoft Portal Packs for HRMS and SCM.
- Configured Integration Broker for synchronization of roles, user profiles, and GL information
- Weblogic web server 6.x – 8.x administration
- On going technical support
- PeopleSoft PeopleTools upgrades
- PeopleSoft patches and bundles via Change Assistant

- Ongoing technical support for portal and applications
- Create Permission Lists and Roles
- Performance monitoring and tuning
- Create environments in Windows 2000 and Linux

PeopleSoft Human Capitol Management- PeopleSoft Administrator and Installer (Oracle Database) (Oct 2004-Feb2005) Total Petroleum, Port Hartcourt, Nigeria

I implemented multi-language HCM 8.8, EPM8.8, and Enterprise Portal 8.8 for TotalFinaElf Nigerian Petroleum in Port Harcourt, Nigeria.

- Installed multi-language HCM 8.8 SP1 maintenance Release 2
- Installed multi-language EPM 8.8 SP2
- Installed multi-language Enterprise Portal 8.8
- Installed bundles and fixes
- Create Permission Lists and roles
- Integrated HCM and EPM Navigation with Enterprise Portal (Non-Federated). All menus exists in Portal
- Configured Integration Broker for use with the Payroll interface
- PeopleSoft Pagelet development ,Content Management, Portal 8.8 Branding, and Enterprise Portal "Look and Feel.
- Ongoing technical support
- Technical Lead
- HRMS Warehouse technical support
- Hardware Sizing

PeopleSoft Financials – PeopleSoft Administrator/Technical Lead (MS SQL Server) (May 2001-Oct 2003) DC Public Schools, Washington, DC

Implemented and upgraded PeopleSoft Financials from version 7.5 to 8.4 for a large public school district, District of Columbia Public Schools, while providing database support for the upgrade from PeopleSoft HR 7.5 to 8.0 and the installation of PeopleSoft Financials. I successfully implemented PeopleSoft Budgets 8.0 and BAM for Education and Government.

- Performed database design.
- Implemented FDM, Budgets, and BAM
- Developed and implemented the database schema.
- Performance-tuned database software and hardware.
- Provided AP, GL, and User Profile integration between HR and Fin through application messaging and integration broker
- Installed daily, weekly, and monthly database integrity checks.
- Set up backup and recovery strategies.
- Create Permission lists and roles.
- Wrote SQR to migrated legacy data into the new SQL Server database.
- Configured and administered the Weblogic and Microsoft IIS Web servers.
- Configured PeopleSoft Portal with single signon.
- Responsible for system administration of Windows NT and 2000 in the PeopleSoft environment.
- Successfully implemented and integrated PeopleSoft 8.0 Budgets with PeopleSoft Financials (version 7.5) and HRMS (version 8.0) for Education and Government.
- Upgraded PeopleTools.

Proprietary and Confidential

- Configured Integration Broker to transfer/synchronize user profile updates, GL and payroll information.
- Installed PeopleSoft patches and service packs.
- Implemented and administered Application Servers and Process Schedulers for PeopleSoft 7.x and 8.x.
- Wrote stored procedures and views.
- Implemented the SQL Server version upgrade to SQL Server 2000.
- Provided database administration support for the PeopleSoft HR upgrade and Financials 7.5 implementation and the version 8.0 HR upgrade.
- Provided technical support for PeopleSoft Financials 7.5 implementation.
- Direct Merchant setup in eProcurement
- Transferred knowledge to the client database administrator.
- Performed troubleshooting and problem resolution of PeopleSoft processes and errors, SQL Server, and Windows NT/2000.
- Created and configured multiple instances of SQL Server 2000, created a DEV environment for Financials and HR and a Production environment for Financials and HR.
- Financial and HRMS Warehouse installation and support.
- Technical Support for EPM modules

MS SQL Server Database Administrator (March 2001 - May 2001) Washington, DC

Database design and tuning for District of Columbia Public Schools' Plumtree Portal website.

- Performed database design.
- Developed and implemented the database schema.
- Performance tuned of database software and hardware.
- Migrated legacy data into the new SQL Server database.
- Conduct evaluation of MS SQL Server 2000.

PeopleSoft Administrator (MS SQL Server) (Feb 2001 - March 2001) Philadelphia, Pa

I performance tuned the PeopleSoft 7.5 installation on Microsoft SQL Server 7.0 database for Philadelphia Housing Authority.

- Performance tuned the hardware and software.
- Certified that the database was ready for installation.
- Installed daily, weekly, and monthly database integrity checks.
- Trained the client's DBA on fundamentals of performance tuning PeopleSoft SQL Server database.

MS SQL Server Database Administrator (August 2000 - Feb 2001)

Implemented MS SQL 7.0 for a payroll project for several major companies.

- Analyzed hardware.
- Upgraded servers to SQL Server 7.
- Performance tuned database.
- Provided backup strategies.
- Tested the conductivity to end user workstations.
- Checked payroll software requirements for a successful implementation.

PeopleSoft Administrator (Oracle Database) (Sept 2000 - Dec 2000) Milwaukee, Wi

I performance-monitored and tuned the database and provided S.U.R.E. analysis for the PeopleSoft installation on an Oracle 8.03 (HP-UX) environment for City of Milwaukee.

- Performance tuned queries.
- Performance tuned the hardware and software.
- Linked Oracle stored procedures to Crystal Reports.
- Performed index tuning and SQL trace.
- Wrote stored procedures and views.
- Performed SURE analysis.

MS SQL Server Database Administrator (August 2000 - Sept 2000) Harrisburg, Pa

Worked on the database design and implementation of importing legacy data from Lawson to MS SQL Server for a direct mail company.

- Designed data transformation to migrate legacy data to the SQL Server 7.0 for use in the Cold Fusion application.

PeopleSoft Administrator (Sybase Database) (Oct 1999 - August 2000) Troy, Mi

I provided database administration expertise and PeopleSoft tuning for upgrade to PeopleSoft Financials 7.5 on Sybase 11.x and Sun Solaris 2.6 at Macmanus.

- Performance tuned queries.
- Performance tuned hardware and software.
- Linked Sybase stored procedures to Crystal Reports.
- Performed index tuning and SQL trace.
- Wrote stored procedures and views.
- Wrote SQRs.
- Installed daily, weekly, and monthly database integrity checks.
- Installed performance monitors and alerts.

MS SQL Server Developer and Database Administrator (May 1999 - Oct 1999) New York, New York

I implemented MS SQL Server 7.0 Data Mart as a SQL Programmer and Database Administrator for Tiffany & Company.

- Performance tuned queries.
- Performance tuned the hardware and software.
- Gathered and documented the client's requirements and performed a fit/gap analysis.
- Performed index tuning and SQL trace.
- Wrote stored procedures and views.
- Identified areas that would require modifications and customizations to meet the business requirements.
- Designed and implemented Data Mart.
- Developed Visual Basic front-end to MS SQL Server Data Mart.
- Installed daily, weekly, and monthly database integrity checks.
- Provided backup and recovery strategies.

SAP Basis Administrator\MS SQL Server Database Administrator (Sept 1998 - May 1999) Tucker, GA

I provided MS SQL Server expertise and SAP BASIS administration for Lane Limited.

- Responsible for monitoring, performance tuning, upgrades, and backups for SAP/SQL
- Successfully migrated the SQL Server 6.5 Database to SQL Server 7.0.
- Implemented a 3-tier landscape and upgraded the SAP R/3 version from 3.0F to 3.1I.
- Utilized BMC and Intel network management tools to aid in monitoring and correcting problems and for help in performance tuning.
- SAP Basis Administration

Project Leader/MS SQL Server/Oracle Database Administrator (June 1996 - Sept 1998) Des Plaines, IL

I provided chemistry and computer expertise to set up a new plant for UOP. Served as project team leader for the manufacturing data acquisition team, which required him to design, implement, and administer a Honeywell SCADA system with an Oracle 8.0 database for plant management.

- Designed and programmed a complete data acquisition system (SCADA) as a project team leader
- Wrote operator's manuals for the SCADA system.
- Wrote the Electronic Lab Notebook software program to provide simultaneous access to the plant data and lab notebook data. This program has been accepted company wide as a standard.
- Team awarded "Role Model Team"

Novell LAN Administrator (June 1993 - June 1996)

Served as the Novell/NT LAN Administrator for a 1500 node network at a manufacturer.

- Duties included performance tuning and monitoring, Lotus Notes administration, network design, and back up.
-

Employment Summary

- Monarch Consulting, Senior Consultant/Owner **(Oct 2003 –Present)**
- Cherry Road Technologies Inc. **a PeopleSoft Partner**, Senior Consultant/Database Administrator **(May 1999 – Oct 2003)**
- Lane Limited, (Rothmans International), Database Administrator **(Sept 1998 – May 1999)**
- UOP/Allied Signal, Chemist, Database Administrator, LAN Administrator **(June 1988 – Sept 1998)**

Client List

- **Credit Suisse**
- **Ocean Bank**
- **Lockheed Martin**
- **University Of Texas Medical Branch**
- **Waste Management**
- **TotalFinaElf Nigerian Petroleum**
- **System 5 Electronics**
- **District of Columbia Public Schools**
- **Tiffany & Company**
- **Sears**
- **Prudential Bank**
- **Tishman Construction**
- **MacManus Group**
- **Gannett Fleming Engineering**
- **McKesson HBOC**
- **City of Milwaukee**
- **Philadelphia Housing Authority**
- **Corning**
- **Ingersoll Rand**
- **Grant MacEwan University**
- **Colorado University**

Professional Accomplishments

- PeopleSoft Certified Technical Consultant, Version 8 (2001)
- Chemistry, DePaul University
- MS SQL Server 7 Administration Certification
- MS SQL Server 7 Programming Certification





- Oracle 8i Administration Certification
- Novell CNA
- MS Office, Lotus Notes, Visual Basic, SAP R/3, Oracle, MS SQL, Novell Netware, Intel Landesk, BMC Patrol Management, OS/2, EMC, Unisys ES7000 admin,Crystal Reports, and MS 95, 98, NT, and 2000, Intel, HP9000, Mandrake Linux administration 8.x-9.x, Openldap administration.
- UOP "Role Model Employee" Nominated 1995 and 1997. Awarded Role Model in 1997

ANDREAS HENSCHKE - PEOPLESOFT CONSULTANT

Mr. Henschke is an Oracle/PeopleSoft Student Administration Consultant with 17+ years of experience, leading and assisting in PeopleSoft Student System implementations and upgrades. Extensive experience in implementations and upgrade efforts from PeopleSoft version 6.0 Beta to version 9.0. Mr. Henschke was part of the original development/test team during the test development stages of the PeopleSoft Campus Solutions software system 6.0 Beta in 1996 while working at PeopleSoft's headquarter in Pleasanton, CA.

Mr. Henschke brings a vast set of skills and "lessons learned" from his experience working at over a dozen universities as the technical lead, functional lead, and/or Project Manager. In the past two years Mr. Henschke has been the Admissions lead

Having worked with many different Registrars, bursar's offices, Admissions offices, and the Financial Aid offices, Mr. Henschke understands the unique university environment. During this time, he has played a vital role to develop efficient processes to address the day-to-day needs of these offices and academic units. His background allows him to understand the needs of the client and provide invaluable insight, from design through post-production support.

PEOPLESOFT SKILLS

Application Designer, PeopleTools, PS Query, XML Publisher, SQL, Student Records, Campus Community, Academic Structure, Admissions, Population Select/Population Update, Cross Functional Integration, Interfaces, Conversions, Reporting, PS Security

Cell: 703-473-9936

SUMMARY OF HIGHER EDUCATION EXPERIENCE

SCHOOL NAME	PROJECT TYPE	SOFTWARE VERSION	MODULES	ROLE
University of Miami **December 2013 - Present**	PeopleSoft Admission Lead	9.0	Admission, Campus Community	Assisting client during the go live period to assist on issues that they are having. Configure PeopleSoft Communications and provide knowledge transfer.
Ohio University **July 2013 – December 2013**	PeopleSoft Architect/Project Manager	9.0	Admission, Student Financial, Student Records,	Assist in determining the configuration changes in Student Records and Student Financials as well as process changes needed to implement the "Tuition Guarantee" program for their students
Columbia University **November 2012 – June 2013**	Program Manager		Legacy Student System	Project Manager of 4 projects and Oversight Responsibility for all Student System's projects (approximately 22 project initiatives)
Salem State University **August 2012 – November 2012**	Adding PeopleSoft Communications to their system and train the staff on it.	9.0	Admission and Campus Community	Requirement gathering for the Admission office's email and letter communication requirements, configure the system to meet the requirement, and train the staff of 15 people in how to configure and use this functionality
University of Maryland University College (UMUC) **March 2011 – May 2012**	Update of PeopleSoft Campus Solutions and HCM/Payroll	9.0	Admission and Campus Community Lead	Met with clients and identified all their PeopleSoft Security needs Roles/permission lists
MacEwan University **January 2011 – February 2011**	Upgrade of PeopleSoft Campus Solutions	9.0	Admission, Campus Community, Student Records, PS Security matrix	Assisted the IBM team with some difficult PeopleSoft configurations, PS Security needs and configured the matrix, trained the staff, and provided planning for User Acceptance Testing
Kutztown University **October 2010 - Present**	Implementation of PeopleSoft Campus Solutions	9.0	Admissions, Campus Community	PeopleSoft Admissions and Campus Community lead
City Universities of New York **August 2008 – September 2010**	Quality/Assurance – Data Mapping-User Acceptance Testing Planning – User Acceptance Testing	9.0	Student Records / Academic Structure/ Admissions/Recruiting, Financial Aid, Student Financial,	Oracle/PeopleSoft Campus Solutions Content Expert – Lead the data mapping of all data elements from the legacy system to the PeopleSoft system, User Acceptance Testing Manager, Advisory role.
University of Texas – Tyler **December 2007 – August 2008**	Implementation of PeopleSoft Campus Solutions	9.0	Student Records, PS Security	Functional Lead
University of North	PS SA Upgrade	9.0	Student	Project Manager

Cell: 703-473-9936

School Name	Project Type	Software Version	Modules	Role
Dakota **July 2007 – December 2007**			Records, Admissions,	
National Defense University **December 2001 – September 2010- (9 years with this client)**	PS SA Implementation and Post Production support	8.0	Student Records	Functional Lead of Student Records, Campus Community, Academic Structure, PS Security configurations
University of Rhode Island **May 1999 – November 2001**	PS SA Implementation	7.5	Student Records, Campus Community, Student Financial, Financial Aid	Functional lead of Student Records, PS Security, Student Financials, Financial Aid
Cornell University **December 1998 – May 1999**	PS SA Implementation	7.0	Technical Lead	Technical Lead
Kentucky Technical and Community College System **June 1998 – Apr 1999**	PS SA Implementation	7.5	Admissions and Student Records	Functional Lead
Princeton University **Jan 1999 – April 1999**	PS SA Implementation – proof of concept	7.0	Admissions/Recruiting, Student Records, Academic Advising, Student Financial, Financial Aid	Project Manager/Functional Lead
University of Louisville **May 1997 – Jan 1999**	PS SA Implementation	7.0	Admission, Student Records, Student Financials, Financial Aid,	Project Manager
University of Wisconsin-Madison **July 1996 – May 1997**	PS Implementation	7.0	Admissions, Student Records-Reporting, Conversions	Technical Lead
PeopleSoft Pleasanton, CA **Feb 1996 – July 1996**	Developing and testing of the PeopleSoft campus solutions modules in Beta version	Beta 6.0	All modules	Testing Manage of Student Financial.

DETAILED PROFESSIONAL EXPERIENCE

Ohio University July 2013 – Present
University of Miami December 2013 - Present
PeopleSoft Admission Lead

As they are going live with PeopleSoft Campus Solution I am providing assistance in troubleshooting/resolving issues, configuring the remaining PeopleSoft Communications, and provide knowledge transfer to their core team. Some of the tasks included:

- Review their current communications setup and made appropriate changes
- Fixed communications they had issues with
- Setup 3CEngine, PS Communications table setup, PopSelect Queries, DataSource, and Report Definition for their Admission's Office.
- Provided knowledge transfer to their staff of Communications
- Sent out approximately 20,000 Decision letters and email messages

Ohio University July 2013 – December 2013
PeopleSoft Architect/Project Management

Assisted the staff with identifying configuration changes and process changes to their current PeopleSoft Student Records and Student Financials configurations once they start their "Tuition Guarantee" program for their students.

Columbia University November 2012 – June 2013
Program Manager of Student Systems
Responsible in either managing or having oversight of all Student System related projects

- Managing and/or having oversight of approximately 25 Student System projects
- Providing bi-weekly status update to the university's executive team
- Provided Business Process re-engineering recommendations that will reduce foot traffic to the Student Services desk by about 3,500 per term.
- Reviewed their current Student System Security process and provided recommendation from experience at past schools as to best streamline this process
- Analyzed and documented current and future processes once PeopleSoft Campus Solutions has been implemented
- Provided a detailed Resource Plan for the technical staff to ensure it is aligned with the requested completion dates of the projects

Salem State University – August 2012 – Present
Configuration and subsequent knowledge transfer of the PeopleSoft Communication functionality to include XML Publisher and CommGen
Although Salem State University is currently live with PeopleSoft Campus Solutions version 9.0, they have not as of yet had configured and used the PeopleSoft Communications functionality. My role was to gather the requirements and configure Communications for the Admission's office. I then am training the Staff in how to configure and subsequently run the letters and email communication using PS Communications.

University of Maryland University College (UMUC) – March 2011 – May 2012
PeopleSoft 9.0 Implementation
Admissions and Campus Community Functional Lead

- Was asked to be part of Cedar Crestone's team to replace two of their consultants that have left employment with Cedar Crestone.
- Worked with the UMUC Admission and Campus Community counter parts in the upgrade efforts from PeopleSoft Campus Solutions version 8.5 to 9.0.

- Was in charge of Requirement Gathering of a complicated online custom Application process. This included the requirement gathering and documenting, working with the technical team during development, and subsequently leading a team of staff members through the testing phase.
- Met with the Admission's staff to identify all their PS Security requirements and designed the security matrix to indicate the Roles and Permission lists
- Identified the PS Security needs of approximately 15 departments such as the President's office staff, Legal office staff, Institutional Research staff, etc and provided the security matrix with the appropriate roles and permission lists as well as the required object security needs.
- Lead the Fit/Gap sessions for Admissions and the changes in Campus Community
- Configured setup tables in Admissions and Campus Community
- Worked with about 10 UMUC departments and the Admission's leadership to identify their staff's PeopleSoft security needs and created subsequently the security matrix
- By request of UMUC taught a one-week course in PeopleSoft (Communications, Pop Select/Pop Update, and PS Query) to about 27 staff member in Tokyo, Japan.
- Lead the UMUC Admission and Campus Community staff in designing the System and User Acceptance test scripts. Subsequently lead the UMUC team with the system testing and the User Acceptance Testing
- Did requirement gathering and subsequently wrote the specs for their custom GoArmyEd Application process. Assisted the Technical team with the development of it as well
- Assisted the UMUC Admission's lead and technical consultant with the custom Online Application (eApp).
- Designed all PeopleSoft Communications (Letter and email) for Admission's offices in the U.S., Germany, and Japan
- Provided assistance to the Project Manager when reviewing and making recommendation in regards to the upgrade efforts such as testing phases, issue resolutions, cutover planning, etc.
- Trained staff in the U.S. as well as wrote training manuals that are UMUC specific

MacEwan University – January 2011 – February 2011
PeopleSoft 9.0 Upgrade
Admissions Lead

- 4 weeks assignment to assist IBM with a variety of tasks such as configuring the PeopleSoft Communication using XML Publisher. Reviewed the PS Security Matrix for their Admission's staff and made changes to it as was needed to meet their requirements. Review configuration already established in Admission, Train the University staff in communications and Admission, provided data scrubbing to prepare the testing environment for testing.

Kutztown University - October 2010 - Present
PeopleSoft 9.0 Implementation
Admissions Lead

- 9 weeks assignment to have the Graduate Admissions, Undergraduate International Admissions, and College of Education up and running in PeopleSoft. Tasks include the following:
  - Review the configuration tables with the client and setup all configuration tables with their required setups, while also making changes to existing configuration tables as needed.
  - Fit/gap of Checklists, Letters/Email, Comments, Service Indicators, Student Groups
  - Setup all the required checklists, Service Indicators, Student Groups as well as most of the Letters/Email.

- Assisted the client in resolving the issues with the TS130 Transcript loads, Checklist assignment via commgen and other various issues they had
- Ensured the appropriate knowledge transfer to the functional staff and teach corrective procedures as needed.
- Configure, test, share with client, and run the 3C engine and pop select processes to update checklist items such as (test scores) when test scores tapes are loaded.
- Advised the client Project Manager on all aspects of the project, including risk factors.

City Universities of New York (CUNY) - August 2008 - July 2010
PeopleSoft 9.0 Implementation
Quality Assurance/User Acceptance Planning

- Served as the PeopleSoft Campus Solutions Content expert providing Quality Assurance for the client via Gartner consulting.
- Data map between the legacy system and PeopleSoft campus solutions all the records and fields with the client's technical lead.
- Designed the User Acceptance Testing plan for PeopleSoft Campus Solutions
- Mapped requirements from the compendium to the test scripts/conditions to ensure that all requirements are being tested
- Provided the university leadership with strategic and best practice approaches to certain area's where difficult decisions needed to be made.
- Reviewed deliverable documents from the consulting partner to ensure it is complete, accurate, and met the requirements.
- Provided expert advice in regards to PeopleSoft Campus Solutions implementations to the client leaderships as needed.

University of Texas – Tyler Texas - 2008
PeopleSoft 9.0 Implementation
Student Records Lead Consultant

- Led the fit/gap and configuration sessions
- Provided assistance to the technical team with the student data conversions
- Reviewed and made adjustments to the Academic Structure
- Responsible for conducting conference room pilot sessions for the Student Records' module
- Responsible for mentoring client's staff on how to utilize the system

University of North Dakota System – Grand Forks, ND – 2007 – 2008
PeopleSoft 8.0 – 9.0 Upgrade
Functional Lead Student Records

- Project Planning: Reviewed the schools project planning to ensure all necessary steps/tasks were included with the correct resource allocation and sequence I timing
- Student Records Fit/Gap from version 8.0 to ver. 9.0: Reviewed fit/gap documentation and made recommendations as needed.
- Customizations/modifications: Reviewed all their customizations/modifications to identify which will not need to be applied to ver. 9.0 due to the new functionality

National Defense University – Washington, DC - December 2001 – September 2010
PeopleSoft 8.0 Implementation and Production Support.
Student Records Functional Lead an Admissions Functional Lead

- Configured the Academic Structure, Student Records, and configuration tables for 6 schools.

- Lead the training team in developing training material and subsequently provided in class end-user training.
- Assisted in all testing cycles
- Developed and configured the PS security infrastructure for 6 Institutions.
- Developed reports by utilizing the PS Query tool or Crystal reporting tool.
- Provided post production support as needed.

University of Rhode Island – Warwick, R.I. - 1999 - 2001
PeopleSoft 7.0 Implementation
Project Manager, Admissions, Student Records, Student Financial, Financial Aid lead

- Designed the project plan for the client.
- Lead the fit/gap and conference room pilot sessions in Admissions, Student Records, Academic Advising, Academic Structure, and Campus Community.
- Lead the testing team with their User Acceptance Testing efforts.
- Wrote all necessary queries and crystal reports for the Admissions and Student Records team.
- Assisted the client with the PS security design, as well as trained their staff on the functionality.
- Assisted the technical team with the strategizing of the student records conversion efforts from the legacy system to PeopleSoft.
- Led the staff through the User Acceptance Testing phase.

Kentucky Community and Technical College System – Lexington, KY - 1998 - 1999
PeopleSoft 7.0 Implementation
Admissions and Student Records Lead

- Functional lead in the implementation efforts of a new Student Administration database for twenty six (26) colleges that were running independent from each in version 7.5 for Student Records, Admission, Advancement, Campus Community, Student Financial, and Financial Aid.
- Lead the fit/gap sessions in Admissions, Student Records, Academic Structure, and Campus Community.
- Lead the consulting team with the internal training initiative where we designed end user training documents and trained the staff.

University of Louisville – Louisville, KY - 1997 - 1999
PeopleSoft 7.0 Implementation
Project Manager, Admissions, Student Records, Student Financial, and Financial Aid Functional lead

- Project Planning: Wrote the Project Plan with all deliverable time lines implemented. This university was part of the first phase to implement version 7.0. Mr. Henschke was able to design a detailed and workable project plan that was so accurate to the point that the project completed within one week of the initial project plan prediction.
- Fit/Gap: Lead a team of consultants and university staff through the fit/gap analysis.
- End-User Training: Trained end-users on the PeopleSoft functionalities.
- Table setups: Lead a team through all the table setups with university specific data
- Customizations: Identified gaps and provided a detailed solutions to all gaps that required customizations.
- Testing: Wrote test scripts and lead a team of staff throughout the testing cycles.
- Go Live: Ensured a smooth go live cycle by troubleshooting issues as they came up.

University of Wisconsin – Madison, WI - 1996 - 1997
PeopleSoft 7.0 Implementation

Campus Solutions – Technical Lead

- Guided the client's technical leads in determining what interfaces, conversions, and reports were needed.
- Assisted the client with the SQRs and SQLs for the conversion efforts.

PeopleSoft – Pleasanton, CA - 1996
Testing – PeopleSoft Student System version 6.0 Beta

- Was part of the initial test team to test the PeopleSoft campus solutions suite in the development stage.

Cell: 703-473-9936

Altamarie Burroughs, MBA, PMP®
Atlanta, Georgia ♦ 404-402-4481 ♦ Burroughsat@gmail.com

PROFESSIONAL SUMMARY

Strategic client executive credited with delivering exceptional service in the public and private sectors while managing program/project operations and change management for outsourced accounts with Total Contract Value (TCV) of $1 - $6 Billion. Successful in exceeding service requirements, managing issues, delivering difficult communications, key messages and timely results while balancing company and client goals, objectives and expectations. Catalyst for innovative strategic outsourcing and consulting solutions to various industries including: Financial Services, Automotive and Healthcare. Demonstrated ability leading multi-disciplinary and international teams in a matrixed environment. Recognized as a proven leader, facilitator, negotiator and team player with excellent analytical, problem-solving, interpersonal and communication skills.

KEY AREAS of KNOWLEDGE

Project & Program Management	Client Relationship Management	Issues Management
Compliance and Audit Readiness	Change and Communications Management	Regulatory Compliance
Strategy and Operations	Customer Experience	Business Controls

PROFESSIONAL EXPERIENCE

IBM Global Services, Atlanta, GA **1999-present**

Sr. Delivery Manager (2012-present) – Ensures client needs are met and exceeded where applicable by developing and managing relationships/partnerships with technical team leads/teams, project office and customer liaisons. Manage the implementation of these relationships/partnerships to ensure positive customer satisfaction, timely responses to client requirements as specified in the contract or Statement of Work (SOW). Accomplishments include:

- Act as single point of contact for Delivery Project Executive and advocate between Service Delivery team, delivery executive and customer. Provide account leadership to the delivery team and direct teams to develop program, project and business strategies to implement solutions to meet contract deliverables and resolve contract issues.
- Manage IBM resources and coordinate client resources to deliver services and solutions to support the client organization. Drive service quality and improvement of service delivery processes.

Client Service Solution Executive (2010-2012) – Drove customer experience and strategy, directed activities of Transformation and Communication teams on a $1Billion outsourced public sector account. Created a culture of continuous improvement by communicating and deploying enterprise-wide best practices, managing contract compliance, risk and change. Improved quality, ensured adherence to business and process controls, managed third party service providers in conjunction with communication of services strategy and communications plan. Accomplishments included:

- Led delivery organization in changing paradigms for delivering services, processes and procedures in transformed environment for large public sector customers. Account earned corporate recognition as "Best in Class" amongst public sector customers and Top 100 account ranking.
- Managed team of (8) project/program managers and team leads to ensure contract compliance, communication of Technology controls, requirements, guidelines and regulations. Balance with Federal and State guidelines, requirements and regulations as well as agency-specific guidelines and mandates.
- Maintained awareness of competitive opportunities to provide recommendations for additional growth revenue and long-term partnering projects.

Governance Program Manager (2008-2009) Established business guidelines/rules, processes and procedures. Managed account governance, compliance and communications for entire account. Led teams in execution of governance strategy and communication plan for go forth operations. Provided oversight that ensured program/project management methodology and contract deliverables complied with customer, company and regulatory requirements. Accomplishments included:

- Developed, deployed, implemented and managed a hierarchical Governance program for communications, organizational change management and operational business goals and objectives. Favorably surpassed deadline for program development and deployment by 30-days.
- Advised and recommended execution strategy for governance, communicated priorities, best practices and standards while managing internal operations, audits, non and regulatory compliance and consistently met all service management requirements. This resulted in early delivery of $500,000 contractual deliverable and avoidance of $50,000 penalty.

Global Business Operations/ Program Manager (2006- 2008) – Supported global leader in strategy development, planning, execution, leading and strategic focus on account initiatives. Managed Program Management Office and Shared Services teams to effectively and efficiently interpret contract deliverables, ensure audit readiness, formulate and implement risk management policies, procedures and standards and ensure initiatives aligned with account and corporate guidelines and objectives. Accomplishments included:

- Managed turnaround of troubled accounts with failing audit reviews. Developed and implemented improvement plans to close gaps on incomplete or delinquent deliverables and undeveloped contract requirements. Negotiated with customer to avoid over $275,000 in penalties on delinquent deliverables.

Transition Manager/Sr. Consultant (2003-2006) – Established newly signed strategic outsource accounts across various industries. Interpreted related control policies, procedures and operational directives for line management. Work closely with project management office in contract initiation phase. Accomplishments included:

- Directed 30-member delivery and transition teams; coached, mentored and provided leadership and direction to a cross-functional team of 15 business analysts, communications and process specialists, project and proposal managers and consultants in development of end to end program management processes, policies and procedures. Results included attainment of service level goals and objectives.
- Implemented processes, procedures and/or measurements as required for satisfactory controls posture. Assisted process owners to analyze audit-review findings, determine and mitigate risks and readiness for follow-up reviews.

Consultant/Project Manager (2001-2003) - Managed complex projects in telecommunications, media and entertainment and manufacturing industries executing world-wide PM methodologies, re-designing and implementing Issues Management and Resolution process. Accomplishments included:

- Negotiated closure on outstanding program-level issues yielding a 15% increase in customer satisfaction ratings and decreased outstanding issues by 70%.

Senior Project Manager (1999-2001) – Guided and managed project teams, provided leadership and direction, created an integrated master schedule for a $300 million dollar financial services account. Gathered requirements, reported status, identified risks and mitigation options and delivered service to exceed contractual service level objectives.

CIGNA Health Care, Atlanta, GA **1997-1999**

Team Lead and Account Sales Operations Manager - Managed 8-person client services account team for middle-market and national accounts. Accomplishments included:

- Reduced days outstanding for issues and customer complaints from 90 to less than 30. Exceeded customer expectations resulting in customer satisfaction scores of 86% and above.

Georgia State University, Atlanta, GA **1995-1997**

Project Manager - Developed and managed RFP process, vendor selection for university network project. Accomplishments include:

- Reduced customer's software costs by $250k through vendor negotiations.

EDUCATION

MBA, Southern Polytechnic State University, Atlanta, GA
B.A., Hampton University, Hampton, VA

CERTIFICATIONS/RECOGNITIONS

Masters Certificate, Project Management, George Washington University, DC
Project Management Institute - Certified Project Management Professional PMP®
HIPAA Compliance Training (Public Sector)