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JAMES MADISON UNIVERSITY.

COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT

Contract No. UCPJMU6765

This contract entered into this 11th day of December, 2023, by ERP Analysts, Inc. hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide the services to the Purchasing Agency as set forth in the Contract Documents.

PERIOD OF PERFORMANCE: From 12/11/2023 through 12/10/2024 with four (4) one-year renewal options.

The contract documents shall consist of:

(1) This signed form;

(2) The following portions of the Request for Proposal RFP FDC-1175 dated June 15, 2023
- (a) The Statement of Needs,
- (b) The General Terms and Conditions,
- (c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
- (d) Addendum No. One, dated July, 25, 2023
- (e) Addendum No. Two, dated August 3, 2023

(3) The Contractor's Proposal dated August 10, 2023 and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
- (a) Negotiations Summary, dated December 1, 2023
- (b) Commonwealth of Virginia Agency Contract Form Addendum to Contractor's Form, dated October 28, 2023, which shall govern in the event of conflict.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:	PURCHASING AGENCY:
By: DocuSigned by: Matthew McPeek 123E86E58E0B486... (Signature) 12/13/2023	By: (Signature)
Matthew McPeek (Printed Name)	Doug Chester (Printed Name)
Title: CFO	Title: Buyer Senior

RFP # FDC-1175 Information Technology Consulting Services
Negotiation Summary for ERP Analysts, Inc.

December 1, 2023

1. Parties agree that this Negotiation Summary modifies RFP# FDC-1175 and the Contractor's initial response to RFP# FDC-1175, and in the event of conflict this negotiation summary shall take precedence.

2. Contractor's pricing schedule for the Purchasing Agency is as follows:
(All prices are in US Dollars and per hour rates)

Oracle Core Technologies	Onsite	Offsite
Project Manager	210.00	175.00
Senior Engineer	175.00	140.00
Engineer	165.00	130.00

Change Mgnt Training, Svcs, and Certs	Onsite	Offsite
Project Manager	210.00	175.00
Senior Engineer	180.00	155.00
Engineer	165.00	130.00

Oracle/PeopleSoft Enterprise Solutions	Onsite	Offsite
Project Manager	210.00	175.00
Sr Techno-Functional	200.00	165.00
Techno-Functional	170.00	140.00

Security and Federation Services	Onsite	Offsite
Project Manager	210.00	175.00
Senior Engineer	165.00	130.00
Engineer	145.00	110.00

Desktop and Mobile Device Management	Onsite	Offsite
Project Manager	140.00	105.00
Senior Engineer	120.00	85.00
Engineer	95.00	60.00

Cisco Tech., Infrastructure Support, and Visualization	Onsite	Offsite
Project Manager	190.00	155.00
Senior Engineer	170.00	135.00
Engineer	160.00	125.00

Microsoft Azure and M365	Onsite	Offsite
Project Manager	185.00	150.00
Senior Engineer	160.00	125.00
Engineer	130.00	95.00

Data Analytics/Visualization/ Warehouse/Lake	Onsite	Offsite
Project Manager	210.00	175.00
Senior Engineer	150.00	115.00
Engineer	140.00	110.00

Okta	Onsite	Offsite
Project Manager	185.00	150.00
Senior Engineer	165.00	130.00
Engineer	145.00	110.00

Workday Technologies	Onsite	Offsite
Project Manager	220.00	185.00
Senior Engineer	175.00	140.00
Engineer	165.00	130.00

Data Integration	Onsite	Offsite
Project Manager	210.00	175.00
Senior Engineer	175.00	140.00
Engineer	165.00	130.00

Salesforce	Onsite	Offsite
Project Manager	210.00	175.00
Senior Engineer	175.00	140.00
Engineer	165.00	130.00

3. Onsite pricing shall be inclusive of all travel costs.

4. Billable hours shall be for actual work hours on authorized projects/tasks rounded to the quarter hour. Billable hours shall not include travel time.

5. Contractor shall provide detailed invoicing to include project title, number of hours worked onsite and/or offsite, role of individual(s) performing the work, and specific tasks performed.

6. The University may also request that these services be provided as a fixed-fee project, as would be mutually agreed to prior to services being rendered, with deliverables billed upon completion of milestones.
7. The University may also request that these services be provided as a monthly subscription service, as would be mutually agreed to prior to services being rendered, with deliverables determined by monthly service requirements.
8. The Purchasing Agency reserves the right to reject any assigned personnel at any time with or without cause. Contractor shall provide a suitable replacement within a timely manner.
9. Contractor has disclosed all potential fees. Additional charges will not be accepted.

COMMONWEALTH OF VIRGINIA AGENCY
CONTRACT FORM ADDENDUM TO CONTRACTOR'S FORM

AGENCY NAME: James Madison University

CONTRACTOR NAME: ERP Analysts Inc

DATE: Oct 28, 2023

The Commonwealth and the Contractor are this day entering into a contract and, for their mutual convenience, the parties are using the standard form agreement provided by the Contractor. This addendum, duly executed by the parties, is attached to and hereby made a part of the contract. In the event that the Contractor enters into terms of use agreements or other agreements of understanding with University employees and students (whether electronic, click-through, verbal, or in writing), the terms and conditions of this Agreement shall prevail.

The Contractor represents and warrants that it is a(n) / / individual proprietorship / / association / / partnership X corporation / / governmental agency or authority authorized to do in Virginia the business provided for in this contract. **(Check the appropriate box.)**

Notwithstanding anything in the Contractor's form to which this Addendum is attached, the payments to be made by the Commonwealth for all goods, services and other deliverables under this contract shall not exceed Purchase Order Amounts; payments will be made only upon receipt of a proper invoice, detailing the goods/services provided and submitted to James Madison University. The total cumulative liability of the Commonwealth, its officers, employees and agents in connection with this contract or in connection with any goods, services, actions or omissions relating to the contract, shall not under any circumstance exceed payment of the above maximum purchase price plus liability for an additional amount equal to such maximum purchase price. In its performance under this contract, the Contractor acts and will act as an independent contractor, and not as an agent or employee of the Commonwealth.

The Contractor's form contract is, with the exceptions noted herein, acceptable to the Commonwealth. Nonetheless, because certain standard clauses that may appear in the Contractor's form agreement cannot be accepted by the Commonwealth, and in consideration of the convenience of using that form, and this form, without the necessity of specifically negotiating a separate contract document, the parties hereto specifically agree that, notwithstanding any provisions appearing in the attached Contractor's form contract, none of the following paragraphs **1 through 18** shall have any effect or be enforceable against the Commonwealth:

1. **Requiring the Commonwealth to maintain any type of insurance either for the Commonwealth's benefit or for the contractor's benefit;**

2. **Renewing or extending the agreement beyond the initial term or automatically continuing the contract period from term to term;**

3. **Requiring or stating that the terms of the attached Contractor's form agreement shall prevail over the terms of this addendum in the event of conflict;**

4. **Requiring the Commonwealth to defend, indemnify or to hold harmless the Contractor for any act or omission;**

5. **Imposing interest charges contrary to that specified by the *Code of Virginia*, §2.2-4347 through 2.2-4354, Prompt Payment;**

6. **Requiring the application of the law of any state other than Virginia in interpreting or enforcing the contract or requiring or permitting that any dispute under the contract be resolved in the courts of any state other than Virginia;**

7. **Requiring any total or partial compensation or payment for lost profit or liquidated damages by the Commonwealth if the contract is terminated before its ordinary period;**

8. **Requiring that the contract be "accepted" or endorsed by the home office or by any other officer subsequent to execution by an official of the Commonwealth before the contract is considered in effect;**

9. **Delaying the acceptance of this contract or its effective date beyond the date of execution;**

10. **Limiting or adding to the time period within which claims can be made or actions can be brought;**

11. **Limiting the liability of the Contractor for property damage or personal injury. The parties agree that this clause does not extend the Contractor's liability beyond its own acts or those of its agents/employees;**

12. **Permitting unilateral modification of this contract by the Contractor;**

13. **Binding the Commonwealth to any arbitration or to the decision of any arbitration board, commission, panel or other entity;**

14. **Obligating the Commonwealth to pay costs of collection or attorney's fees;**

15. **Granting the Contractor a security interest in property of the Commonwealth;**

16. **Bestowing any right or incurring any obligation that is beyond the duly granted authority of the undersigned agency representative to bestow or incur on behalf of the Commonwealth.**

17. **Requiring the "confidentiality" of the agreement, in whole or part, without (i) invoking the protection of Section 2.2-4342F of the Code of Virginia in writing prior to signing the agreement (ii) identifying the data or other materials to be protected, and (iii) stating the reasons why protection is necessary.**

18. **Requiring the Commonwealth to reimburse for travel and living expenses in excess of the agency policy located at** https://www.jmu.edu/financemanual/procedures/4215mie.shtml

This contract may be renewed annually by the Commonwealth after the expiration of the initial term under the terms and conditions of the original contract except as noted herein. If the Commonwealth elects to exercise the option to renew the contract for an additional renewal period, the contract price(s) for the succeeding renewal period shall not exceed the contract price(s) of the previous contract term increased/decreased by no more than the percentage increase/decrease of the "Other Services" category of the CPI-W of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.

This contract has been reviewed by staff of the agency. Its substantive terms are appropriate to the needs of the agency and sufficient funds have been allocated for its performance by the agency. This contract is subject to appropriations by the Virginia General Assembly.

IN WITNESS WHEREOF, the parties have caused this contract to be duly executed, intending thereby to be legally bound.

AGENCY by [signature]	**CONTRACTOR by** [signature]
Title Buyer Senior	**Title** CFO
Printed Name Doug Chester	**Printed Name** Matthew N N'Peek

JAMES MADISON UNIVERSITY

Information Technology Consulting Services

RFP# FDC-1175

Submitted to:
Doug Chester, Buyer Senior

James Madison University
752 Ott Street, Wine Price Building, First Floor, Suite 1023
Harrisonburg, VA 22807

August 15, 2023, 2:00 PM

Submitted by:
ERP Analysts, Inc.
425 Metro Place North, Suite 510
Dublin, OH 43017

Proposal Point of Contact:
Doug Hahn
Account Manager
(614) 401-6841
doug.hahn@ERPA.com

ERPA

www.ERPA.com

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1. RFP COVER SHEET & ADDENDA ACKNOWLEDGEMENT

1.Return RFP cover sheet and all addenda acknowledgements, if any, signed and filled out as required. (RFP Section V, [B], Question 1)

REQUEST FOR PROPOSAL
RFP# FDC-1175

Issue Date: **June 15, 2023**

Title: **Information Technology Consulting Services**

Issuing Agency: **Commonwealth of Virginia**
James Madison University
Procurement Services MSC 5720
752 Ott Street, Wine Price Building
First Floor, Suite 1023
Harrisonburg, VA 22807

Period of Contract: From Date of Award Through One Year (Renewable)

Sealed Proposals Will Be Received Until 2:00 PM on August 3, 2023 for Furnishing the Services Described Herein.

SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.

All Inquiries For Information And Clarification Should Be Directed To: Doug Chester, Buyer Senior, Procurement Services, chestcfd@jmu.edu; 540-568-4272; (Fax) 540-568-7935 by July 20, 2023 by 5:00 PM EST.

NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.
In compliance with this Request for Proposal and to all the conditions imposed herein, the undersigned offers and agrees to furnish the goods/services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Name and Address of Firm:

ERP Analysts, Inc.

425 Metro Place North, Suite 510

Dublin, OH 43017

By: *(Signature in Ink)*

Name: Matthew McPeek *(Please Print)*

Date: 8/10/2023

Title: Chief Financial Officer

Web Address: www.ERPA.com

Phone: (614) 385-1951

Email: matthew.mcpeek@ERPA.com

Fax #: (888) 432-0204

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1 MM #2 MM #3 ____ #4 ____ #5 ____ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:
☐ YES; ☒ NO; *IF YES* ⇒⇒ ☐ SMALL; ☐ WOMAN; ☐ MINORITY *IF MINORITY*: ☐ AA; ☐ HA; ☐ AsA; ☐ NW; ☐ Micro

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against an offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

Rev. 3/8/23

2. PLAN & METHODOLOGY FOR PROVIDING GOODS/SERVICES

2. Plan and methodology for providing the goods/services as described in Section IV. Statement of Needs of this Request for Proposal. (RFP Section V, [B], Question 2)

ERP Analysts, Inc. (ERPA) is grateful for the opportunity to respond to the James Madison University (JMU) solicitation for Information Technology Consulting Services (RFP# FDC-1175). ERPA has the depth and breadth of resources, experience, expertise, and proven processes for placing consultants to meet the consulting needs of JMU. ERPA proposes leveraging our vast team of IT experts:

- ERPA has hundreds of consultants averaging ten (10) years of experience that are focused on Oracle/PeopleSoft services and support. Over 60% of our employees are Oracle Certified. Eighty-five (85%) percent of our consultants have higher education experience.
- ERPA's internal Talent Management Team maintains a network of more than 2,000 prequalified consultants for specialized needs, many of which have over 20 years of experience and continually provide support for our clients.
- ERPA's remote team of Oracle/PeopleSoft experts in our Ohio-based Center of Excellence (COE) can be leveraged for technical and functional support as needed.
- ERPA has resources with experience spanning several IT platforms, systems, and technologies including but not limited to Microsoft Azure, VMware, Oracle Business Intelligence (BI) suite, Amazon Web Services (AWS), Java development, Workday, Salesforce, etc.

ERPA higher education clients include the University of California – Office of the President where we have staffed over 20 PeopleSoft roles, University of Washington, University of Wisconsin, Los Angeles Community College District, California State University System, Cerritos College, Palomar College, University of Colorado, Washington State Board of Community & Technical Colleges, New Jersey City University, Lone Star College, University of Texas System and University of Maine System. Overall, we have provided staff augmentation services to over half of our clients beyond just PeopleSoft, many of which have repeatedly sought out qualified candidates from ERPA.

ERPA's continued growth of our consulting and staffing services is based on four (4) key factors:

Consultant Qualification Process. Our refined consultant selection and qualification process focuses on finding resources who are not only experts in their field, but embody ERPA's core values, which are Empathy, Responsibility, Passion, and Agility.

Fulfillment Process. When ERPA receives a request or requirement for staffing or consulting services our dedicated Talent Management team qualifies and prioritizes the requirement based on urgency and need. From there the team consults the resource pools previously outlined.

Training. Our employee training approach focuses on ongoing IT and best practices training, so that our resources provide clients with knowledge transfer on the latest technologies, products, and functionalities.

Past Success. Our demonstrated success has enabled ERPA to confidently provide staffing services to our customers. For example, ERPA staffed 20 positions over two (2) months for the University of Texas System. When ten (10) positions were released at the same time, ERPA easily provided 30 qualified candidates within three (3) days.

STATEMENT OF NEEDS (RFP Section IV)

1. Describe your corporate competencies/experience providing IT consulting services for one or more of the technologies listed below.
a. Oracle Core Technologies (RFP Section IV, [1a])

ERPA has a longstanding relationship with Oracle at all levels. These relationships extend back to the founding of ERPA more than 20 years ago and include relationships within the executive, sales, and delivery ranks.

Across ERPA's employees and talent resource pool, Oracle's core technologies are supported through a variety of different types of engagements as described in the next section.

b. Oracle/PeopleSoft Enterprise Solutions (RFP Section IV, [1b])

ERPA is a client-centered IT services firm that has focused on Oracle/PeopleSoft consulting since 1999. Founded by two PeopleSoft consultants, it is ERPA's mission to deliver significant value by leveraging innovation and deep industry and technology expertise to maximize client PeopleSoft systems. That is why ERPA continues to assess client needs to deliver cloud modernization strategy and solutions through a proven framework and consultative approach.

ERPA's core business focuses on optimizing client Oracle/PeopleSoft systems through three (3) key offerings and its portfolio of services:

- Professional Services. ERPA provides a full range of consulting services to address business challenges with PeopleSoft systems at the core, including cloud-related assessments, business consulting, implementations, upgrades, database conversion and migration, and software/operations optimization. ERPA has functional and technical consulting resources that are highly qualified to deliver services onsite or remotely to meet client requirements.
- Managed Services. ERPA Managed Services provide complete solutions from PeopleSoft application and database management to cloud infrastructure hosting, including application migration to cloud services, to ensure clients meet the demands of changing technology and business needs through improved efficiency, security, reliability, and reduced operational costs.
- Staff Augmentation. ERPA staff augmentation services provide customers with the expertise needed to execute day-to-day operations and/or special projects. ERPA has over 400 US based employees that average ten (10) years of experience and are focused on PeopleSoft services and support. Over 60% are Oracle Certified and many have additional certifications (e.g., PMP, Microsoft, AWS, Workday, etc.). Additionally, ERPA's internal Talent Management Team maintains a network of 2,000+ prequalified consultants for specialized needs.

ERPA has stated that it is fully committed to supporting the PeopleSoft platform in line with Oracle. Oracle has publicly committed to full support for the PeopleSoft platform for 10-year period that is extended each year and ERPA is in lockstep with that approach.

While many competitors are moving away from PeopleSoft to support only Software as a Service (SaaS), ERPA continues to invest in PeopleSoft solutions and in support for PeopleSoft clients. The services provided address all aspects of the PeopleSoft ecosystem including hosting, managed services, and consulting and advisory services.

ERPA has a dedicated practice that delivers platform migration and services (if desired) for PeopleSoft that allow this software suite to effectively be delivered in a "SaaS" like model that delivers the best aspects of the SaaS experience without requiring the costly transition to a new software platform. This practice is

Oracle/PeopleSoft Enterprise Solutions (RFP Section IV, [1b]) continued

highly experienced in migrating PeopleSoft to a cloud infrastructure and providing application and infrastructure-managed services.

Functional optimization is another focus area of ERPA. This practice area allows PeopleSoft clients to utilize the solution more fully to maximize investment in the platform. The keys are driving greater alignment between the business goals and requirements and the capabilities of the PeopleSoft systems.

For ERPA, full service also includes unique services that target cumbersome processes and drive efficiencies throughout the lifecycle of the software ownership.

Within ERPA's over 400 employees is the PeopleSoft Center of Excellence (COE). ERPA's commitment to client-focused, flexible, and expert Oracle/PeopleSoft support is highlighted by significant investment in this organization. The COE team is continually staffed with on average 45-50 consultants who are experts in all aspects of ERP required tools from Oracle and other vendors including Oracle/PeopleSoft applications (HCM, Finance, Campus Solutions, Portal), Oracle EPM, Oracle ETL, Oracle Business Intelligence, Oracle Fusion Middleware, Oracle Access Management, database technology (including Oracle, MS SQL Server, DB2), cloud hosting design and management (e.g., AWS, OCI, Azure, etc.) and more.

The dedicated COE staff provides clients with instant access to Oracle expertise in a multitude of disciplines with the option of bringing these resources on-site as desired. Additionally, the COE team allows ERPA to scale resources up/down to meet project and support needs without impacting the budget or timeline.

ERPA is a provider of professional services, managed services, and staff augmentation support for numerous clients. The focus of this practice is to provide support for PeopleSoft for those clients with an emphasis on ensuring the systems are up to date, supported, secure, and functioning optimally. This places a premium on ERPA's ability to stay abreast of changes to the system, enhancements to functionality, and improvements to the technology provided by the PeopleSoft platform. This emphasis ensures that ERPA is organizationally prepared and experienced to support, implement, and deploy all current releases of PeopleSoft.

ERPA resources have expertise and experience providing functional and technical consulting services with all release levels, including current releases, of PeopleSoft products.

Table 1 ERPA Experience with Oracle PeopleSoft

Product	Functional	Technical
PeopleSoft Campus Solutions (v9.2)	✓	✓
PeopleSoft Human Capital Management (v9.2)	✓	✓
PeopleSoft Finance & Supply Chain Management (v9.2)	✓	✓
PeopleSoft Enterprise Application Portal (v9.2)	✓	✓
PeopleTools (8.5x – current)	✓	✓

ERPA has the depth and breadth of technical and functional resources, over 400 consultants, who can perform PeopleSoft HR, Campus Solutions, and Finance services and support. ERPA technical resources include, but are not limited to PeopleSoft Developers, PeopleSoft Administrators, Technical Leads, Database Administrators, System Engineers, Cloud Engineers, and Network Engineers.

Oracle/PeopleSoft Enterprise Solutions (RFP Section IV, [1b]) continued

ERPA technical resources have experience with all PeopleSoft components. Some notable examples are:

- Installation and setting up of PeopleSoft environments for Illinois State University, University of California at Santa Barbara, Florida State College Jacksonville, Daytona State College, New Jersey City College, and PeopleSoft customers.
- ERPA resources utilize PeopleSoft Deployment Kits (DPK) to deploy PeopleSoft environments automatically including full-tier, mid-tier, tools/software/app domain/etc. ERPA has experience using PeopleTools DPK and Application DPK files. ERPA utilizes DPKs in upgrades if the client's PeopleTools version allows it.
- Designing, developing, and testing customizations using PeopleTools, Application Designer, People Code, Application Engine, Component Interface, Integration Broker, File Layout, Application Package, Process Scheduler, PeopleSoft Query, Data Mover), SQR, and XML Publisher
- Developing, testing, and deploying custom Approval Frameworks for PeopleSoft applications. For example, we streamlined the procurement process by creating custom Procurement Contract workflows for East Kentucky Power Cooperative.
- ERPA has extensive experience working with PeopleSoft Integration Broker. We have implemented real-time integrations in PeopleSoft HCM, FSCM, Campus, and CRM applications, and have set up integrations between different PeopleSoft applications on different PeopleTools levels. ERPA has utilized Integration Broker to configure PeopleSoft integrations with third-party products like OIM, DocuSign, Symmetry, etc. We have created and consumed web services for PeopleSoft applications. Our PeopleSoft Integration Broker Framework experience also includes Web Services - Synchronous and Asynchronous RESTful APIs for third-party application integrations. In addition, ERPA has extensive experience in middleware technologies such as Oracle SOA, MuleSoft, and IBM MQ series.
- ERPA has extensive experience working with various integration services. We have implemented real-time integrations in PeopleSoft HCM, Finance, Campus, and CRM applications, and have set up integrations between different PeopleSoft applications on different PeopleTools levels. ERPA has utilized Integration Broker to configure PeopleSoft integrations with third-party products like OIM, DocuSign, Symmetry, etc. We have created and consumed web services for PeopleSoft applications. Our PeopleSoft Integration Broker Framework experience also includes Web Services - Synchronous and Asynchronous RESTful APIs for third-party application integrations.
- ERPA has experience with Application, PUM, and PeopleTools upgrades.
- ERPA has extensive experience using PeopleSoft Change Assistant for applying updates/fixes as part of application maintenance as well as for upgrades. This is the tool PeopleSoft uses to apply updates to the system and for every project on which we have worked.
- ERPA resources have significant experience and expertise in configuring, maintaining, and monitoring all components of the PeopleSoft Internet Architecture (PIA) including application server, web server, and process scheduler. This includes utilizing the PSADMIN utility and configuration templates.
- ERPA consultants have performed extensive testing on all delivered Fluid UI functionality as part of PeopleSoft 9.2/PeopleTools 8.54. ERPA has implemented Fluid as part of 9.2 upgrades for customers like East Kentucky Power Cooperative and Alaska Airlines.

Oracle/PeopleSoft Enterprise Solutions (RFP Section IV, [1b]) continued

- ERPA has experience implementing Elastic Search with PeopleSoft HCM, Finance, and Campus Solutions applications. ERPA has implemented 2.x and 6.x versions of Elastic Search in a single node and cluster configurations on Linux and Windows Platforms across sever clients.
- ERPA has extensive experience with iHub branding PeopleSoft with custom logos, colors, and content for clients such as Peralta College, Chapman University, Los Angeles Community College District, and the City of Raleigh. We have done so for HCM, Finance, and Campus Solutions.
- ERPA has experience in implementing SSO for PeopleSoft with different providers like Microsoft AD, Oracle OIM, Ping Access, etc. ERPA also has experience in deploying SSO for PeopleSoft using SAML integration with Azure AD, ADFS, and Oracle OAM. We have supported SSO for clients like Los Angeles Community College District, Illinois State University, City of Raleigh, City of Boston CorVel Corporation, and Alaska Airlines.

ERPA functional resources have extensive experience with partnering with our clients through the full project lifecycle – including developing strategies and plans, conducting Conference Room Pilots (CRP), leading Fit/Gap analysis sessions, providing Business Process Design and Re-engineering (BPD, BPR) services, software design and configuration, data conversion mapping into and out of PeopleSoft, specification development, customizations, PS query development, report design, integration design, third party vendor interface design, security design, communicating with technical developers, conducting training and testing within large public university systems through the nation.

- ERPA functional resources average over 15 years of PeopleSoft experience with many having over 20 years.
- ERPA resources have extensive PeopleSoft applications experience with fit/gap analysis, including educating clients on new functionality and features and identifying customizations that can be retired. ERPA conducts fit/gap analysis business meetings with end-users and implementation resources to review Current State, Future State, and each requirement in detail to determine the scope and path forward. These meetings provide the team with a project view and the ability to provide feedback to prioritize and adjust requirements.
- ERPA's resources know the Campus Solutions product and are also Subject Matter Experts in one or more of the Campus Solutions module areas (Admissions and Recruitment, Academic Advising and Degree Audit, Student Financials, Student Records, Financial Aid) – drawing upon their experiences in the Higher Education industry.
- ERPA can work with the client to oversee the end-user content discovery and system design process. All system design requirements are tracked and monitored through a Requirements Traceability Matrix (RTM). During the system design process, we evaluate and modify the system design during early design meetings and testing; evaluate system performance; and verify the requirements during acceptance testing.
- ERPA resources create, document and present business process flows based on the Functional requirements gathering. Business process flows are presented to the client to ensure the requirements have been correctly documented and to identify any improvements or customization to be made. These business process flows are valuable for future training of new resources.
- ERPA has recently provided functional consulting for higher education clients including, but not limited to, Arizona State University, Brandeis University, California State University System, Cerritos College, Florida International University, Illinois State University, Lone Star College, Los Angele Community College District, New Jersey City University, San Diego State University, University of California - Office of the President, University of Colorado, University of Maine System and the University of Texas System.

Oracle/PeopleSoft Enterprise Solutions (RFP Section IV, [1b]) continued

ERPA has deep experience providing module-specific support for PeopleSoft HCM, Finance, and Campus Solutions. We have outlined a sample of recent implementations/upgrades/support for the most common modules below.

Table 2 Sample Module Experience

Module	Client(s)
Human Resources (HCM)	Detroit Public Schools, Lower Colorado River Authority, East Kentucky Power Cooperative, Arizona State University, University of Colorado, University of Puget Sound, Illinois State University, Florida State College at Jacksonville, Alabama State University, University of Maine System, Howard University, Cerritos College
Benefits Administration (HCM)	Arizona State University, University of Colorado, Detroit Public Schools, University of California - Office of the President, East Kentucky Power Cooperative, Papa John's, Illinois State University, Florida State College at Jacksonville, Alabama State University, University of Maine System, Howard University, Cerritos College
Time & Labor (HCM)	Detroit Public Schools, City of Raleigh, University of Puget Sound, Papa John's, Illinois State University, Florida State College at Jacksonville, Alabama State University, University of Maine System, Howard University, Cerritos College
Payroll for NA (HCM)	University of Colorado, Papa John's, East Kentucky Power Cooperative, Papa John's, Illinois State University, Florida State College at Jacksonville, Alabama State University, University of Maine System, Howard University, Cerritos College
Accounts Payable (FIN)	South Carolina Ports Authority, Detroit Public Schools, University of Colorado, New Jersey City University, Papa John's, University of Maine System, University of California - Santa Barbara, Florida State College at Jacksonville
Accounts Receivable (FIN)	South Carolina Ports Authority, Detroit Public Schools, University of Colorado, New Jersey City University, Papa John's, University of Maine System, University of California - Santa Barbara, Florida State College at Jacksonville
General Ledger (FIN)	South Carolina Ports Authority, Florida International University, University of Colorado, University of Maine, New Jersey City University, City of Raleigh
Purchasing (FIN)	B & W Pantex, South Carolina Ports Authority, University of Colorado, University of Maine, Detroit Public Schools, New Jersey City University, Papa John's
Commitment Control (FIN)	Florida International University, University of Colorado, University of Puget Sound, Detroit Public Schools, City of Raleigh, New Jersey City University
Financial Aid (CS)	California State University System, Daytona State College, Florida State College at Jacksonville, Peralta Community College, Los Angeles Community College District, University of Maine System, University of Texas System
Student Records (CS)	California State University System, Cerritos College, Daytona State College, Florida State College at Jacksonville, Los Angeles Community College District, University of Maine System, University of Texas System,
Academic Advisement (CS)	California State University System, Cerritos College, Daytona State College, Florida State College at Jacksonville, Los Angeles Community College District, University of Maine System, University of Texas System,
Campus Community (CS)	California State University System, Cerritos College, Daytona State College, Florida State College at Jacksonville, Los Angeles Community College District, University of Maine System, University of Texas System
Student Financials (CS)	California State University System, Cerritos College, Daytona State College, Florida State College at Jacksonville, Los Angeles Community College District, University of Maine System, University of Texas System, San Diego State University

c. Desktop and Mobile Device Management (RFP Section IV, [1c])

ERPA can place talented resources to provide desktop and mobile device management services.

d. Microsoft Azure and M365 (RFP Section IV, [1d])

ERPA has Microsoft certified resources that can support Microsoft Azure and M365 including how these technologies may interface with PeopleSoft and other enterprise applications.

e. Okta (RFP Section IV, [1e])

ERPA has resources with experience across various identity and access management applications including Okta.

f. Data Analytics/Visualization/Warehouse/Lake (RFP Section IV, [1f])

ERPA has resources with experience across various data analytics, data warehouse, data lakes, and data visualization platforms. This includes the Oracle BI suite, Tableau, Kibana, etc.

g. Change Management Training, Services, & Certification (RFP Section IV, [1g])

ERPA has experience providing Organizational Change Management (OCM) training and services for client projects and has resources that can assist JMU. These resources are typically PROSCI-certified and follow our standard OCM approach.

ERPA's OCM approach achieves stakeholder adoption through organizational leadership alignment, stakeholder engagement, communication, and training. The goals of OCM are to ensure that *people are aware, people are consulted, and people are trained.* One of the keys to project success is organizational support. This starts with executive leadership but extends throughout the organization. To drive support, ERPA's plan is comprised of the following tasks:

- Solicit engagement of key executives. This is a key step in the process. Active, visible participation by key executives is key to gaining organizational buy-in of the changes that will be occurring. ERPA will assist these key executives in project messaging and communications.
- Actively participate in building the governance structure. The project managers rely on governance largely for decision-making, but ERPA also views it as the core for project communications both outward to the impacted users and inward back to the project team. The OCM team will be embedded at each level of this structure to ensure that messaging out and feedback in flows freely.
- Drive communication. Experience has shown that adoption of change is more easily achieved when the impacted audience is highly aware of impending changes and feels engaged in the process by having an opportunity to provide feedback. ERPA is aware that effective communications tactics vary across organizations and will work with the organization to structure the plan accordingly. The OCM team will craft a communication plan and work with the client to ensure that all impacted users and interested parties are well-informed.
- Structure and deliver training. There are multiple audiences that will be impacted by the changes introduced by a project. These include casual users who will be impacted by changes to the interface through to power users who will have new features, changes to existing features, and business process changes that could impact the manner in which their jobs are performed. ERPA works with the client's team to develop a change management plan, communication plan, and communication materials, and to train the combined team.
- Reinforce skills required. Change does not stop at go-live. Plans will be enacted to ensure that the owners of the training materials and coursework have methods in place to keep these updated as the organization evolves.

h. Security and Federation Services (RFP Section IV, [1h])

ERPA has resources that have experience providing security and federation services like Shibboleth and OpenID. This field encompasses a broad spectrum of skills. ERPA has strong relationships with consultants that provide niche services within this area that supplement the in-house skills that ERPA has.

i. Cisco Technologies, Infrastructure Support, and Virtualization (RFP Section IV, [1i])

ERPA has strong experience meeting clients' needs in various Cisco technologies (excluding video conferencing), infrastructure support, and VMware.

j. Audio Visual Technologies (RFP Section IV, [1j])

ERPA does not retain resources that support audio-visual technologies.

k. Secure Research Enclaves (RFP Section IV, [1k])

ERPA does not retain resources that support secure research enclaves.

l. Other Technology (RFP Section IV, [1l])

ERPA has resources with experience across a wide array of technologies including, but not limited to Salesforce, ITSM systems, Blackboard, Mulesoft, etc.

Supporting the JMU Workday Journey. Further, ERPA has two business streams, Workday and Oracle/PeopleSoft, with each stream having one central mission, that being, to deliver significant value to our customers by leveraging cross-functional knowledge, innovation, and deep industry understanding to proactively facilitate our clients' technology roadmap. Through these two business streams, ERPA has gained a unique depth of insight into the culture, needs, and goals within the Higher Education sector.

ERPA is a Workday Application Management Services (AMS) partner with a strong team consisting of 100% US-based, Workday-certified personnel with expertise covering Workday's comprehensive solutions. ERPA resources average five (5) years of direct Workday experience in a wide range of industries, and five (5) certifications each. These certifications span across all of Workday's solutions and include the most common modules organizations deploy.

To this end, ERPA has experience supporting clients who are migrating from PeopleSoft to Workday. This often includes a predictable, fixed monthly fee-based PeopleSoft Managed Services engagement to ensure optimal operations while the client teams focus on the Workday deployment. We are flexible and easy to contract with, so the PeopleSoft Managed Services monthly fees can also be re-purposed for Workday AMS (also fixed monthly fee) and/or Phase X deployments (e.g., module implementations, stabilization, integrations, optimizations, etc.).

2. Describe approach and methodology that will be used to provide IT consulting services to James Madison University. Include how your firm would manage the scope of projects. (RFP Section IV, [2])

ERPA's dedicated Account Manager, Doug Hahn, will serve as the liaison and primary contact for JMU to ensure overall success through active engagement, and by reviewing upcoming requirements and performing thorough job skill mapping before a consultant or team of consultants is assigned. This includes reviewing the scope of work and working with both JMU and ERPA delivery.

When ERPA receives a request or requirement for staffing or consulting services that does not leverage our COE team, our recruiting teams qualify and prioritize the requirement based on urgency and JMU need. As staffing experts, these teams have a deep understanding of client staffing requirements and a large network of fulltime employees, and pre-qualified consultants whose availability and skill profiles are proactively updated. This ensures resumes are presented quickly and efficiently without sacrificing quality. ERPA can typically provide resumes within one (1) to three (3) business days.

ERPA has the depth and breadth of consultants to meet James Madison University's staffing needs. ERPA has a resource pool of over 400 US-based consultant employees and 2,000+ pre-qualified resources from which it draws consulting experience and satisfies staffing needs. This growing talent pool has allowed ERPA's staffing business to represent approximately 80% of its annual revenue. **Over the past two (2) years, ERPA has placed over 1,700 consultants across 820 client sites for various technologies and skillsets**.

ERPA can provide the desired number of resources as needed by the University. ERPA sources its consultants from a robust talent pool comprised of roles in varying levels of experience and expertise. ERPA provides staff augmentation for clients such as the University of Wisconsin, University of Texas System, University of California – Office of the President, Washington State Board of Community and Technical Colleges, University of Washington, City of Raliegh, City of Minneapolis, City of Boston, and Metropolitan Council.

ERPA's continued growth of consulting and staff augmentation services is based on four (4) key factors:

Consultant Qualification Process. Our refined consultant selection and qualification process focuses on finding resources who are not only experts in their field, but who embody ERPA's core values, which are Empathy, Responsibility, Passion, and Agility.

Fulfillment Process. When ERPA receives a request or requirement for staffing or consulting services its dedicated Talent Solutions and Enterprise Consulting Teams qualify and prioritize the requirement based on urgency and need. From there the team consults the resource pools described below in ERPA's staffing approach.

Training. ERPA's employee training approach focuses on ongoing IT and best practices training, as well as cross-functional training so that our resources provide clients with knowledge transfer on the latest technologies, products, and functionalities.

Past Success. Our demonstrated success has enabled ERPA to confidently provide staff augmentation services to customers. For example, ERPA staffed 20 positions over two (2) months for the University of Texas System. When ten (10) positions were released at the same time, ERPA easily provided 30 qualified candidates within three (3) days.

Describe approach and methodology that will be used to provide IT consulting services to James Madison University. Include how your firm would manage the scope of projects. (RFP Section IV, [2]) Continued

ERPA has a vast team of employees, contractors, and a network of qualified candidates that can be leveraged to meet JMU requirements. Together they create the talent resource pool from which ERPA draws consulting experience and satisfies staffing needs. ERPA follows a four-pronged talent acquisition and management model that offers highly qualified and vetted resources with the right skills and expertise in a timely, responsive, and customer-oriented manner. Specifically, we utilize:

- **Talent Resource Pool.** ERPA's dedicated recruiting teams proactively grow and maintain a talent resource pool of full-time W-2 employees and prequalified independent consultants with expertise and experience across a diverse spectrum of technologies such as PeopleSoft, Workday, and AWS. ERPA sources, qualifies, and maintains thousands of consultant candidates enabling the quick placement of resources. These resources are maintained regularly while on assignment, and weekly when available for a new assignment. ERPA first looks to source most talent from this resource pool.
- **Referral Program.** ERPA has a referral program in place that leverages the network and reach of our over 400 geographically dispersed employees and 2,000 independent consultants to facilitate the search for qualified candidates to meet client staffing needs.
- **Active Sourcing.** Our team utilizes the careers portal on the ERPA website, attends job fairs, and actively pursues new candidates.
- **Third-Party Tools.** If needed, we utilize third-party websites and job boards such as LinkedIn, Monster, CareerBuilder, and Dice.

3. Provide the names, qualifications, and experience of personnel to be assigned to James Madison University. Designate who would be assigned as the primary contact for the account. (RFP Section IV, [3])

ERPA's dedicated Account Manager, Doug Hahn, will serve as the liaison and primary contact for JMU. Doug Hahn has over 30 years of IT Consulting, and Delivery experience across multiple roles (including CIO), various industries and technologies, including higher education where he served as a project manager, business analyst, consultant, and IT administrator. He has worked previously with the City University of New York, Texas A&M, University of Nevada – Las Vegas, and University of Georgia.

Further, Cecil Cadwallader, VP of Sales, will provide engagement oversight, working closely with Doug to ensure all JMU needs are met. Cecil is a proud JMU alumnus, along with his wife, sisters, brother, and sister-in-laws. JMU tradition, heritage, and pride runs deep in his family, and they have been honored to support JMU over the years including the Leeolou Alumnae Center development effort.

Cecil has over 25 years of experience providing ERP consulting solutions and delivering desired business outcomes for clients across higher education institutions, non-profit organization, commercial and healthcare clients, and public sector agencies. Cecil is a veteran of multiple enterprise-wide software implementations with expertise in providing overall project management and implementation strategy consulting. Some of his clients include Daytona State College, Florida State College at Jacksonville, Alabama State University, City of Raleigh, City of Hope, Children's Hospital of Los Angeles, American Chemical Society, First Citizens Bank, Horry Telephone, and AARP.

ERPA has provided resumes for personnel who may be assigned to support JMU in Appendix A.

4. Describe the ability to provide continuity of consultants throughout the duration of a project. (RFP Section IV, [4])

As previously mentioned, ERPA has hundreds of employees and prequalified consultants that can be utilized throughout JMU's project.

ERPA's initial source of resources is always its US-based employee consultants. If the staffing or consulting requirement does not leverage ERPA's full-time personnel the Talent Management Team engages to assist with the staffing acquisition. ERPA's Talent Management Team will map resource skill sets and experience to specific client requirements; firstly, to those within its 2,000+-member strong 'bench' of pre-qualified consultants and secondarily, through one or more of the multiple recruiting tools ERPA utilizes. It could be said that the recruiting engine is always running at ERPA to maintain relationships within our bench of pre-qualified candidates as well as resourcing new talent. The cumulative result of having a wide range of full-time professionals already on staff, following well-established capacity planning methods, and strategic recruitment techniques for acquiring new talent ensure that ERPA can meet all staffing and/or surge requirements JMU may have.

5. Describe IT consulting services available from your firm. Examples of services may include, but are not limited to, the following: (RFP Section IV, [5])
a. Implementation (RFP Section IV, [5a])

ERPA provides a full range of consulting services to address business challenges with PeopleSoft systems at the core, including implementations, business consulting, upgrades, and software/operations optimization. ERPA has functional and technical consulting resources that are prepared to deliver onsite or remotely to meet JMU requirements.

ERPA has performed numerous implementations for higher education clients. Examples include:

- U.S. Merchant Marine Academy, which is a net new Campus Solutions implementation on AWS GovCloud to replace their disparate student information system and ensure compliance with security standards like FedRamp.
- University of Maine System, which is a re-implementation of Campus Solutions, including business process re-engineering to meet their unified accreditation objective.
- California State University System (CSUS) where ERPA transitioned five (5) campuses from a calendar quarter to a semester system. ERPA performed a full PeopleSoft Campus Solutions reconfiguration for each of the campuses as well as a reimplementation of the functionalities distinct within each campus.

b. Development (RFP Section IV, [5b])

ERPA has more than two (2) decades of experience in delivering PeopleSoft solutions requiring PeopleSoft development across all of the tools and technologies available within the PeopleSoft environment. ERPA has over 400 employees, including more than 200 PeopleSoft Application Developers with extensive experience supporting PeopleSoft applications. ERPA's developers average more than ten (10) years of experience and are experts in PeopleSoft development tools including Application Designer, Application Engine, PeopleCode, SQR, Integration Broker, BI Publisher, PS Query, Crystal Reports, COBOL, and nVision.

ERPA can assist with PeopleSoft maintenance and updates including PUM updates, PeopleTools upgrades, retrofits, and the development of bolt-ons/custom applications.

c. Project Management (RFP Section IV, [5c])

ERPA can provide experienced Project Managers who follow Project Management Institute's Project Management Book of Knowledge (PMBOK) proven best practices. Following PMBOK processes ensures

Project Management (RFP Section IV, [5c]) Continued

a solid approach organized in five (5) major phases: Initiation, Planning, Execution, Control, and Close. Effective management of the project is a key driver for success. ERPA's project methodology is based on industry-standard PMBOK practices and evolves based on prior project experiences. The approach uses both traditional waterfall and contemporary agile practices, depending on the project type.

ERPA is a full-service provider, capable of managing the project from start to completion. The project plan is used to lay out the project tasks and sequence of events and allows for the assignment of resources to tasks.

The Project Manager (PM) is responsible for schedule dependencies and resource loading and balancing. ERPA encourages a partnership model where there are PMs from both ERPA and the client. This shared model allows for efficient management across the consulting and client staff. This is highly beneficial in ensuring that the schedule of other projects and operational activities can be shared, prioritized, and accommodated within the project at hand. Similarly, this approach provides a clear management structure for addressing issues regarding staffing, workloads, risk, and other issues.

ERPA believes that the focus of an engagement is solving business problems, not installing software. As such, ERPA uses a business requirements-centric process. This approach is embedded in the tools and tactics that are deployed throughout the project. A key document is the Requirements Traceability Matrix (RTM). The RTM is used to capture and track the disposition of all requirements.

The RTM will provide referenceability to other supporting documents such as decision log items, design documents, functional and technical specifications, test scripts, test results, etc. so that the full disposition of a requirement can be traced from identification to completion. The RTM captures the information, but the management of scope is through the use of a clear governance model that ensures that scope is well understood and that there are direct effective mechanisms for addressing any changes that need to be introduced.

d. Architecture and Design (RFP Section IV, [5d])

ERPA has significant experience and expertise in designing and supporting architectures for applications such as PeopleSoft, with a specific emphasis on application architecture design on the AWS Cloud. ERPA architects have the following key considerations for designing architecture for applications:

- Performance
- Reliability
- Security
- Scalability
- High Availability
- Performance
- Cost
- Disaster Recovery

e. Capacity Planning (RFP Section IV, [5e])

ERPA manages several PeopleSoft applications and workloads and is helping several of its customers with capacity planning for infrastructure, storage, and databases. Our engineers monitor and analyze performance and usage patterns. ERPA engineers also analyze growth projections that may be required of the resources and use the trends as well as growth projections to plan capacity. If the infrastructure is hosted on the cloud, ERPA utilizes alerts to increase and decrease resource capacity dynamically using auto-scaling. Key considerations for capacity planning are current resource capacity and performance capabilities, historical usage trends, growth projections, and planning for redundancy and failover.

f. Installation and Configuration (RFP Section IV, [5f])

PeopleSoft Application installation requires several steps to set up the required software, databases, files, and configurations. ERPA is well-versed and experienced in PeopleSoft installations. ERPA follows vendors' instructions and processes for installation. Our PeopleSoft ERPA Application Administrators and DBAs will typically install the web server, application server, and middleware (Weblogic and Tuxedo), followed by database installation, configuration of parameters, setting up of application server domain, and setting up other components such as Integration Broker. This is followed by the creation of PeopleSoft database schema and configuration of the web server and application server. As a best practice, ERPA always performs smoke testing before releasing the application environment to users.

g. Performance and Scalability (RFP Section IV, [5g])

ERPA Engineers and Application Administrators design the architecture for optimal performance and scalability. ERPA will ensure they understand the required performance goals and metrics for infrastructure, database, and processes, and based on the target metrics will baseline current system performance key metrics. In case of performance bottlenecks from an infrastructure perspective, ERPA will identify, optimize, and fine-tune CPU usage, memory utilization, disk I/O, and configuration parameters. In case of a performance bottleneck caused by a database, ERPA will perform SQL tuning, build indexes where required, and clean up databases to optimize performance. In the case of long-running processes and queries, ERPA will tune the SQL, or optimize application code for the desired performance.

h. Conversion (RFP Section IV, [5h])

ERPA has extensive knowledge of and experience in the creation of data conversion processes and scripts. Data conversion tends to be an iterative process that will undergo as many iterations as needed to ensure that all data in the new system is accurate and complete.

Depending on the need, ERPA will use a variety of tools to perform the loads required. These tools include SQL, SQR, Excel-to-CI, and others. Typically, data will be staged into staging tables for review and approval for data accuracy and integrity before loading into final tables and, as a general rule, ERPA will leverage existing PeopleSoft processes to take advantage of delivered data edits and secondary processing.

ERPA performs system validation as part of conversions to make sure the PeopleSoft pages work appropriately with newly converted data.

Lastly, as a Workday partner that implemented its own Workday tenant, ERPA resources understand the effort to migrate data as part of SaaS deployment.

i. Monitoring, Administration, and Upgrades (RFP Section IV, [5i])

ERPA has considerable experience and expertise in PeopleSoft Administration and the associated activities. ERPA has developed significant automation for routine PeopleSoft Administration activities such as backups, refreshes, cache clearing, server bounce, and other routine activities. ERPA PeopleSoft Admins also utilize automation, alerts, and alarms to monitor the architecture and database components. In addition, ERPA performs PeopleTools upgrades and PUM updates on a routine basis for its managed services customers. Our PeopleSoft administrators have performed over 300 PeopleTools upgrades.

j. Training Development (RFP Section IV, [5j])

ERPA has resources that are experienced in providing multiple types of training to meet different learning styles inclusive of developing training plans and materials such as job aids and quick reference sheets. As well, ERPA resources provide on-the-job and shared leads model knowledge transfer. ERPA has provided

Training Development (RFP Section IV, [5j]) Continued

staff augmentation services for the University of California – Office of the President that included among other roles providing a PeopleSoft Training Content Developer.

Training is a key component of ensuring the effective utilization of PeopleSoft. ERPA tailors training for each client based on audience needs and subject matter. We develop a training strategy and provide a detailed training plan to include project teams, formal training, and end-user training. The training plan identifies who needs what training, and when it will be needed.

ERPA's training methodology is designed to promote and utilize the tools and methods necessary to complete knowledge transfer:

- **Qualified Trainers.** ERPA's trainers are functional experts with comprehensive experience in PeopleSoft module software and workflows. Our trainers work with clients to ensure training meets the requirements.
- **Leverage Investment for Similar Customers.** ERPA has delivered more than 1,500 PeopleSoft projects, and we will utilize this experience to customize training programs.
- **Training Curriculum.** ERPA will create and deliver customized training courses designed for JMU to ensure a thorough understanding of the processes required to maximize utilization of the PeopleSoft development tools, to include understanding the relevance to their specific job and identifying shortcuts that can be used to increase familiarity and efficiency.
- **Training Documentation.** ERPA guides and assists clients with the development of training materials, as well as participates in the end-user training delivery in a support role. We supplement our training approach with easy-to-use, easy-to-follow training material that is customized to depict each customer's specific functionalities. User guides include step-by-step instructions and screenshots of the system.

k. Operations Metrics (RFP Section IV, [5k])

ERPA provides services governed by service level agreements and established Key Performance Indicators (KPIs) to all its customers. These KPI metrics are jointly established by ERPA and its customer as soon as the engagement begins.

For Managed Services or Support operations, the key metrics that are tracked are Response Time, Resolution Time, and customer satisfaction. For Projects, the key metrics tracked are on-time delivery, on-budget delivery, customer satisfaction, and quality metrics. For staffing operations, the key metrics tracked are time to fill and quality of hire.

6. Describe training options and specify associated costs in Section X. Pricing Schedule. Include a catalog of training offerings and differentiation between technical staff and end-user training. (RFP Section IV, [6])

ERPA believes that the measure of success of a project is adoption, not completion. This is a key distinction, and it drives the activities during the project to ensure that those involved are aware of the impact of change and are prepared to take ownership of the solution.

This places an emphasis on knowledge transfer. This is a special form of training that has an outsized impact on adoption. ERPA's process allows for its consultants to work closely with staff from the client that is responsible for performing the tasks in the scope of the project. Working closely together allows those individuals to see how the system is configured and to understand why it is set up that way and what it looks like for it to perform correctly. This "hands-on" activity throughout the deployment allows those individuals to become internal experts within their departments and routinely prove to be invaluable in supporting the organization post go-live.

7. Provide examples of recent projects at higher education institutions comparable to James Madison University. Describe the project, time frame, end result, etc. (RFP Section IV, [7])

To date, ERPA has successfully completed over 1,500 projects for more than 500 customers. ERPA has approximately 150 higher education clients and understands the issues, trends, priorities, and communication requirements of higher education institutions. Eighty-five (85%) percent of our consultants have higher education experience and more than 80% of ERPA's direct business is dedicated to Oracle/PeopleSoft consulting and staffing for higher education information system engagements.

Higher Education Qualifications & Experience. ERPA understands higher education and understands the culture, challenges, and opportunities of institutions like JMU. The majority of ERPA's PeopleSoft business is dedicated to working within the higher education sector, providing consulting, managed projects, and PeopleSoft Managed Services as well as application hosting in Amazon Web Services.

Table 3 ERPA Recent Projects

Client	Project(s)	Dates
California State University System – Los Angeles	Quarter-to-Semester Conversion (Q2S). Note: Los Angeles represents one (1) project of a total of five (5) campuses ERPA worked on for the Q2S conversion contract.	1/2018 - 12/2020
Los Angeles Community College District (LACCD)	Campus Solutions – assessment and upgrade, Implementation of Fluid User Interface	3/2018 - ongoing
University of California – Santa Barbara	FSCM upgrade and migration to the cloud and application managed services.	5/2018 - ongoing
Illinois State University	CS and HCM cloud migration and managed services	7/2019 - ongoing
University of Texas System	Multiple FSCM and HCM projects	11/2022 - ongoing
University of California Office of the President	Major system implementations to include a common HR/Core and Payroll system	6/2015 - ongoing
Alabama State University	Multiple projects including managed services and hosting for CS, HCM, and Finance	2015 - ongoing
University of Maine System	Multiple projects from v9.2 upgrades to moving HCM/Finance to the cloud and reimplementation of PeopleSoft on-premise CS	9/2015 - ongoing
United States Merchant Marine Academy	Implementing the full suite of PS CS to replace their existing systems.	9/2021 - ongoing
Florida State College Jacksonville	Application management, maintenance, and oversight for PeopleSoft HCM, Finance, CS and Portal (iHub) applications hosted in CenturyLink cloud.	7/2017 – ongoing

The table on the following page provides a sampling of ERPA's higher education clients as well as the modules involved. ERPA has both the proven experience and rightly skilled consultant base to provide Functional and Technical support for all PeopleSoft modules.

Provide examples of recent projects at higher education institutions comparable to James Madison University. Describe the project, time frame, end result, etc. (RFP Section IV, [7]) Continued

Table 4 Sample of ERPA Higher Education Clients

CSU Projects	Consulting & Support Focus						
	CS	FIN	HCM	People Tools	Oracle DB	Tech	Func
California State University System	X		X	X	X	X	X
Cal State East Bay	X	X	X			X	X
CSU Los Angeles	X			X		X	X
Cal Poly Pomona	X			X	X	X	X
Sacramento State	X					X	
Cal State San Bernardino	X			X	X	X	X
San Diego State	X			X	X	X	X
San Francisco State	X	X	X	X		X	X
CSU San Marcos	X						X
Alabama State University	X	X	X	X	X	X	
Brandeis University	X			X	X	X	X
Cerritos College	X			X		X	X
Chapman University	X	X	X	X	X	X	
Daytona State College	X	X	X	X		X	
Florida International University	X	X	X	X	X		X
Florida State College at Jacksonville	X	X	X	X	X	X	
Illinois State University	X		X	X	X	X	X
Lone Star College	X	X	X	X	X	X	X
Los Angeles Community College District	X			X	X	X	X
New Jersey City University	X			X	X	X	X
Palomar Community College District	X	X	X	X	X	X	X
Peralta Community College District	X	X	X	X		X	X
University of California Office of the President		X	X		X	X	
University of California Santa Barbara		X					
University of Arizona	X		X	X	X	X	X
University of Maine System	X	X	X	X	X	X	X
University of Texas System	X	X	X	X	X	X	X
Washington State Board for Community & Technical Colleges	X	X	X	X	X		X

8. Describe the ability to provide for a thorough transfer of knowledge to JMU IT on any given project. (RFP Section IV, [8])

ERPA's knowledge transfer process is designed to efficiently exchange the essential content and changes embedded in each unique effort. ERPA's history of superior client satisfaction is anchored through the identification of client stakeholders and incrementally transitioning critical information throughout the course of the project and during the post-implementation phase (if applicable). The approach is efficient, proven, and client-focused.

Throughout ERPA's methodology, there is an emphasis on ensuring clients are prepared for the time when our functional and/or technical team completes the engagement. A big part of this is an emphasis on

Describe the ability to provide for a thorough transfer of knowledge to JMU IT on any given project. (RFP Section IV, [8]) Continued

paired resources for each area comprised of an ERPA consultant and client representatives. ERPA consultants work to ensure that the client staff is engaged. One tactic is having the client leads give status

updates. The ERPA consultant's role is to ensure that the client staff member is successful. Experience has shown that this brings focus and attention to the tasks and ensures that the client lead is engaged and prepared for the future state.

ERPA will provide knowledge transfer to the core JMU team members in certain circumstances, ERPA will bolster the knowledge transfer process using targeted meetings/discussions to provide clarity to complex points as required. The more time the JMU team can invest, the better the outcome.

ERPA will document and present work performed to JMU, and ERPA will ensure that JMU staff is aware of support documentation and processes that are available to them from the software vendor. The following table outlines common tactics that ERPA uses to facilitate knowledge transfer.

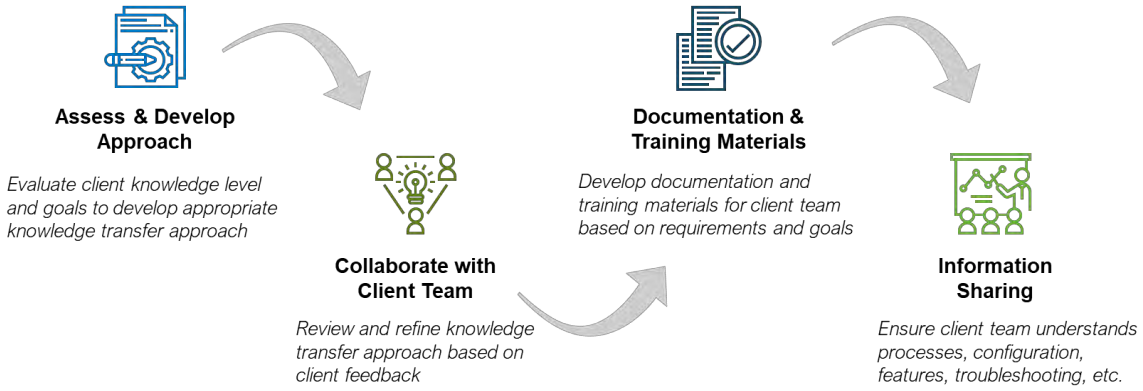

Figure 1 ERPA Knowledge Transfer

ERPA will work with JMU to identify the knowledge transfer approach that works best for the JMU team.

9. Describe your approach to project management. (RFP Section IV, [9])

ERPA Project Management Services are focused on ensuring that projects are delivered in a manner that is efficient and successful, with the key success criteria being the adoption of the solution. Completion of tasks is not sufficient. To meet this objective, the methodology utilizes an approach that is based on the Project Management Institute's Project Management Body of Knowledge (PMBOK). That approach is detailed below.

As previously mentioned, ERPA uses a requirements-centric process. From a tracking standpoint, a Requirements Traceability Matrix (RTM) is used to capture and track the disposition of all requirements. The RTM will provide referenceability to other appropriate supporting documents such as decision log items, design document sections, functional and technical specifications, test scripts, test results, etc. The RTM captures the information, but the management of scope uses a clear governance model that ensures that scope is well understood and that there are direct effective mechanisms for addressing any changes that need to be introduced.

The Project Manager (PM) is responsible for schedule dependencies. The team encourages a shared leads model where there are both a consulting PM and a client PM. This shared model, if possible, allows for efficient management across the consulting and client staff and is described in more detail elsewhere

Describe your approach to project management. (RFP Section IV, [9]) Continued

in this response. This is highly beneficial in ensuring that the schedule of other projects and operational activities can be shared and accommodated within the project at hand. Similarly, this approach provides a clear line of management for addressing issues regarding staffing, risk, and other issues.

As noted, the project management approach is based on the PMBOK. Projects are organized in the five (5) major phases: Initiation, Planning, Execution, Control, and Close. The following section outlines the high-level aspects of this methodology along with typical deliverables. Specific deliverables will be jointly determined during project initiation.

Initiation: During the initiation phase, a series of documents is developed and used to define and refine the project. A Project Charter is developed jointly by the client and consulting project managers. The Project Charter is a high-level document that defines the project goals, business case for the project, project stakeholders, deliverables, milestones, milestones high-level scope, resource plan, and the overall timeline. The next major document developed is the Statement of Work (SOW). The SOW is like the Project Charter but includes more details to further refine the Project Charter. It is developed jointly by both the client and the consulting team. The SOW details the purpose of the project, scope of work, timeline, milestones, deliverables, acceptance criterion, contract type, commercial terms, and payment schedule.

Planning: The planning phase lays out a roadmap for the project team to follow. The Project Plan identifies the tasks, dependencies, project schedule/timelines, resources, deliverables, and milestones necessary to meet the project objectives and business needs – while adhering to the allocated project budget and project timeline. The team will use Smartsheet Project Management software to create and track progress of the project. Additionally, Smartsheet will be used to provide a project portal with access to all project logs, status, and other communication vehicles.

During the planning phase, the project manager will also develop a Communications Plan, a Training Plan, a Change Management Plan, and a Risk Management Plan.

- Communication Plan helps identify the various stakeholders, preferred communications method, and frequency of communication and helps organize who needs what information and when.
- Training Plan identifies who needs to be trained, the training format, and the timeline for training delivery.
- Change Management Plan helps guide individuals, teams, and the organization through changes to systems, business processes, organizational structure, and budget allocations. This is often interwoven with the Training and Communications plans and frequently requires executive support.
- Risk Management Plan identifies risks to the project and proposes actions to mitigate risks.

Execution: The execution phase is where most of the project activities occur. These activities commonly include building out the infrastructure, requirements gathering, analysis, design, business process improvement, change management development, testing, training, conversion, and deployment cutover.

Control/Monitor: The Control/Monitor phase tracks and measures progress against the project plan. Any deviations in timelines, effort, resource issues, and training/skillset issues, are identified in a timely manner and a plan to address the issues is presented. The scope is monitored and controlled. Identified KPIs for the project are used to gauge project progress.

Close: The final phase of the project is the Close. Once the new system is live and stabilized, the project manager conducts a project review to identify things that worked well, and things that need improvement, and a quick evaluation of the team members. The lessons learned from this session are also documented. A final status report is prepared, with a summary of the project, budget status, and deliverables. Documentation is gathered, packaged, and delivered to the client.

Describe your approach to project management. (RFP Section IV, [9])

Quality Management. ERPA implements a quality management process that uses quality assurance processes focused on preparation, planning, and auditing, and delivered through tactical inspections, reviews, and refactoring. The key to quality is an early focus and consistent application throughout, and Quality Management (QM) is embedded into the full delivery lifecycle employed by ERPA. The steps taken during each phase of the activities vary in scope and are tailored to the task at hand, but all begin with up-front planning. The planning period allows for the definition of goals, the introduction of standards of measurement, and the insertion of Quality Control (QC) tasks into the overall project planning effort. The scope of ERPA's quality assurance process extends beyond the solutions themselves and includes a focus on the overall customer relationship. Within this response, ERPA refers to all quality efforts collectively as Quality Assurance.

ERPA's Quality Assurance Plan (QAP) starts with a clear statement of the project tasks, timeline, objectives, and goals prior to starting the work. This carries from the project level to the subtasks involved to be able to compare completed metrics to planned and to allow for investigation of deviations. During the creation of the project plan to drive delivery, dedicated periods are set aside and identified in the project plan to address QA. These periods coincide with re-baselining activities for the project plan to allow QA feedback to be addressed appropriately. While QA is a continuous effort, having defined periods where quality is the specific topic has proven to be effective in refining the approach if needed. Pairing this with a re-baseline effort for the project plan allows any identified alterations to be planned and reflected in the work product.

ERPA creates and manages processes supporting decisions, risk, and issues mitigation. All are associated with quality and are accompanied by related supporting documents and activities. Next, ERPA defines the goals and associated quality objectives. ERPA has adopted the SMART approach to the identification of quality objectives. Each objective must be Specific, Measurable, Appropriate, Realistic, and Timely. The first two are important drivers for the goals and allow processes to be established that will drive a quality feedback loop that is key.

While each deliverable has specific goals, there are several aspects that are common to the project:

- Adherence to timeline, scope, and budget. These are the most obvious quality metrics for any project. To achieve this a clear definition of each is captured prior to commencing work.
- Capture all requirements to manage scope.
- Each requirement identified is captured in an RTM. These are considered quality objectives and the RTM defines each along with specific metrics to evaluate quality; this includes clear test provisions with appropriate success definitions.
- Establish clear metrics to measure progress toward reaching each of the goals identified.
- ERPA tracks the timeline using a detailed project plan. The budget is tracked with a "burn sheet" style document that compares planned expenditures to actuals with a continuous forecast of project costs through completion. The scope is managed through the project governance process that requires scope to be monitored and all changes to be elevated to the steering process for decision.
- Facilitate the process by establishing defined feedback times and encouraging ad-hoc feedback.
- ERPA places Quality Review Checkpoints at key junctures within the project and these are identified within the project plan. Each of these is paired with a project re-baseline activity to ensure that feedback is actionable, and any impacted activities are reflected within the plan going forward.

Describe your approach to project management. (RFP Section IV, [9]) Continued

Table 5 Documentation & Processes

Document/Process	Description
Risk & Mitigation Log	Identifies potential project risks and any identified tactics for mitigating them.
Issue Log	Captures issues raised during project execution and associated resolution.
Decision Log	Identifies significant areas of contention that required additional analysis and presentation of options for consideration to the governance structure.
Project Plan	Lays out specific tasks, timelines, and assignments for the project. Also, identifies specific times for Quality Review Checkpoints to occur.
Requirements Traceability Matrix (RTM)	Captures project requirements and the full disposition of each within the project framework. This includes results of Fit/Gap, development activity (if required), test script reference, testing results, etc. Provides a clear set of objectives and allows for measurement and capture of results
Burn sheet	Budget to Actual tracking spreadsheet. The document is initially populated with the projected team's hours and costs. As the project progresses, budget values are replaced with actuals and future activity is reforecast as needed, providing views for spend and a continuous projection of the project's final costs.
Setup/Configuration Data Comparisons	ERPA has customized tools that mirror PeopleSoft compare reports but focus on the comparison of setup and configuration values between environments. This is a key tool for performing QA tasks around the creation of PeopleSoft environments and allows assurance that the creation of an environment will not introduce errors and issues that must be diagnosed and resolved.

As outlined in the table below, to make the plan actionable, and ensure accountability toward the quality goals, roles, and responsibilities are identified for the team members. Once the plan is in place, a continuous process of observation, measurement, feedback, and refinement of the approach takes over. This allows for problem identification early in the process when solutions are actionable and have the lowest impact on the plan.

Table 6 Roles and Responsibilities to Create an Actionable QAP

Role	QA Responsibility
Project Managers	Manages overall plan. Coordinates documentation for each of the defined goals of each of the Deliverables. Coordinates quality-related communication through the project governance structure. Makes recommendations for resolution to quality deviations.
Project Team Leads	Defines quality objectives for the project using SMART. Ensures that staff in their areas of responsibility are involved in defining objectives and associated metrics.
Project Team Staff	Provides data supporting the metrics for the quality objectives. Provides recommendations for continuous improvement in process.
Governance Team	Reviews quality reports and provides decisions on requests for changes to address quality in delivery.

Risk Management. ERPA recognizes that risk is both inherent and fluid across the life of any project. The methodology employs a strong communication cycle between the consultants and the client. Escalation points, key decision makers, and options analysis are all part of the risk management strategy. The below table outlines common risks and the respective risk mitigation strategies.

Describe your approach to project management. (RFP Section IV, [9]) Continued

Table 7 Common Project Engagement Risks

Challenge	Risk	Risk Mitigation Strategy
Timeline	Timeline and scope are key risk areas for any project of scale.	• ERPA utilizes common best practices for measuring and managing project timelines. These include the use of detailed project plans with forward projections. • ERPA uses a strong governance model to ensure that all interested parties are aware of and adhere to the project schedule. • If schedule changes are required, ERPA utilizes the governance structure for approvals.
Scope Definition	Changes in scope are a common risk for projects of scale.	• ERPA's processes ensure that the scope is clearly defined, captured, and communicated throughout the project's lifespan. • ERPA uses a strong governance model to ensure that all interested parties are aware of and adhere to the project scope. • If scope changes are required, ERPA utilizes the governance structure for approvals.
Project Sponsorship	Project sponsorship and support is key to ensuring that the project moves forward as intended.	• ERPA utilizes a model that ensures that project sponsors are visible and engaged throughout the project. • Sponsors are asked to participate in the project kick-off and other communications venues to be visible supporters of the project and able to encourage full participation from the staff. • Sponsors are engaged in the project governance model for review, approvals, and feedback.
Staff Availability	Access to appropriate decision-makers and subject matter experts is key to efficiently moving the project forward.	• ERPA expects that resources assigned to the project from the client will be capable and empowered to make routine decisions. • ERPA will engage higher-level decision-makers within the governance process. Timely decision-making is expected. • In the event of staff turnover, both the client and ERPA agree to work together to ensure work continuity.

Beyond the common risks, each project has a unique risk profile and associated mitigation strategies. ERPA utilizes best practice tactics such as utilizing an active risk assessment log. This log is updated with risks, mitigation strategies, probabilities, and an assessment of impact should the risk actualize. The Project Manager is responsible for updating this log and ensuring that appropriate mitigations are identified and deployed as appropriate.

10. Describe how your firm would propose a functional staffing plan indicating the number, characteristics, and schedule for the consultants. (RFP Section IV, [10])

This RFP does not contain specific projects or tasks to be completed so this response will describe ERPA's general approach to functional staffing that is applied to all requests.

Describe how your firm would propose a functional staffing plan indicating the number, characteristics, and schedule for the consultants. (RFP Section IV, [10]) Continued

Staffing Plan

Numbers: ERPA emphasizes smaller teams of consultants through the use of senior resources. This allows for the team size to be smaller and facilitates more effective communication between the consultants and the staff being supported. Also, ERPA utilizes its COE to deliver technical services to functional project-based staff. Again, this allows the team size to be smaller and technical resources can be engaged on-demand, as needed, when needed, to eliminate the impact of idle resources on the project. If the need for technical resources is larger, then full-time resources can be engaged.

Characteristics: As noted above, ERPA utilizes senior resources. All assigned resources will have significant experience with the target functional area. In most cases, resources will have experience in the software but also relevant experience in the business fields being supported (e.g., GL consultants that are CPAs, payroll consultants that have been payroll supervisors, etc.)

All field consultants are supported by ERPA's COE. The COE team has expertise in all facets of PeopleSoft, is on staff, and is available to support the consultants with questions outside their field of expertise (e.g., supply chain questions that a campus solutions consultant might encounter). This method ensures deep expertise in the specific topic area of focus but also ensures the availability of a wide breadth of knowledge where one-off questions may be required to move projects forward.

Schedule: ERPA teams coordinate schedules with the client staff. Frequently, the consulting staff will work a four-day work week overlapping with client staff. Traditionally this was to facilitate travel schedules. Onsite travel is no longer the common model, but clients have indicated that they sometimes prefer having a day in the week to allow their staff to focus on work not related to project activity. ERPA routinely works four and five-day work weeks as requested and adheres to client working hours and time zones.

For each requirement submitted to ERPA, the staffing team will identify the appropriate resources and work with JMU to validate the approach, team members, and logistics to ensure successful delivery.

11. Describe the functions that may be provided by a subcontractor of your firm. Specify the expertise and credentials required from the subcontractor. (RFP Section IV, [11])

ERPA will not subcontract any of the proposed work to an external firm. As is common within the consulting industry, however, ERPA does sometimes engage independent consultants on a contract basis to work on projects. For consultants engaged in this manner, ERPA assumes all responsibility for their performance, and they will be indistinguishable from other ERPA consultants assigned to perform work.

3. EXPERTISE, QUALIFICATIONS, & EXPERIENCE OF THE FIRM AND RESUMES

3. A written narrative statement to include, but not be limited to, the expertise, qualifications, and experience of the firm and resumes of specific personnel to be assigned to perform the work. (RFP Section V, [B], Question 3)

About ERPA. As mentioned previously, ERPA is a client-centered IT services firm that has focused on Oracle/PeopleSoft consulting since 1999. Founded by two PeopleSoft consultants, it is ERPA's mission to deliver significant value by leveraging innovation and deep industry and technology expertise to maximize client PeopleSoft systems. ERPA has over 400 employees. ERPA's employees are geographically dispersed with most administrative staff and COE resources located at Dublin, OH (corporate office).

A written narrative statement to include, but not be limited to, the expertise, qualifications, and experience of the firm and resumes of specific personnel to be assigned to perform the work. (RFP Section V, [B], Question 3) Continued

ERPA's core business focuses on optimizing client Peoplesoft systems through three (3) key offerings and its robust portfolio of services:

- **Professional Services.** ERPA provides a full range of consulting services to address business challenges with PeopleSoft systems at the core, including business consulting, implementations, upgrades, database conversion and migration, and software/operations optimization. ERPA has functional and technical consulting resources (domestically and globally) that are prepared to deliver services onsite or remotely to meet client requirements.
- **Staff Augmentation.** ERPA staff augmentation services provide the expertise needed to execute day-to-day operations and/or special projects. ERPA has over 400 employees that average ten (10) years of experience with a focus on PeopleSoft services and support. Over 60% are Oracle Certified and many have additional certifications (e.g., PMP, AWS, Workday, etc.). Also, ERPA's recruiting team maintains a network of 2,000+ prequalified consultants for specialized needs.
- **Managed Services.** ERPA Managed Services provide complete solutions from PeopleSoft application and database management to infrastructure hosting, including application migration to cloud services, to ensure clients meet the demands of changing technology and business needs through improved efficiency, security, reliability, and reduced operational costs.

Figure 2 ERPA Portfolio of Services

Empathy, Responsibility, Passion, and Agility are the core values on which ERPA was founded and are embedded in everything ERPA does. These values define ERPA's culture and guide the ERPA team's interactions with each other, and, most importantly, customers. ERPA was founded on the premise that a strong company culture creates an environment that fosters innovation and growth and translates directly into employee satisfaction and customer service excellence.

Focused PeopleSoft Practice. ERPA is one of the largest PeopleSoft consulting firms focused on higher education and public sector organizations. Our clients range from single institutions to multi-college districts and university systems on the higher education side, to local, state, and federal agencies for public sector. ERPA is privately held and organically grown with continued profitability.

A written narrative statement to include, but not be limited to, the expertise, qualifications, and experience of the firm and resumes of specific personnel to be assigned to perform the work. (RFP Section V, [B], Question 3) Continued

Higher Education Qualifications & Experience. ERPA's experience profile boasts over 1,500 successfully completed PeopleSoft projects for more than 500 customers. ERPA has worked with higher education clients such as the University of California – Santa Barbara, University of Colorado, Brandeis University, Emory University, Florida International University, California State University System, University of Washington, University of Wisconsin, the University of Texas System, and the University of Maine System.

Additionally, as roughly eighty-five (85%) of ERPA personnel have higher education experience they bring experience and lessons learned from their prior work performed across the country with various institutions and university systems, including Harvard Business School, Texas A&M University, University of Texas Health Science Center, Washington State University, City Colleges of Chicago, and Princeton University, among others.

ERPA understands higher education including the culture, challenges, and opportunities institutions like JMU face. More than 80% of ERPA's direct business is dedicated to working in higher education, providing technical and functional Peoplesoft consulting, managed projects, and PeopleSoft Managed Services and hosting for higher education information systems.

Team of PeopleSoft Experts. ERPA has over 400 U.S. based employee consultants. These consultants are overwhelmingly dedicated to technical and functional PeopleSoft services and support. As mentioned previously, many of ERPA's employees have higher education experience, some having served as faculty members and administrators as well as consultants.

> *The expertise that we've had available to us has made major contributions to our success with PeopleSoft. We wouldn't have been able to do this without ERPA.*
>
> - Executive Director of Enterprise Applications, Florida State College at Jacksonville

ERPA Center of Excellence. Of these consultants, approximately 50 are assigned to ERPA's Center of Excellence (COE). This group is based in Dublin, Ohio, and provides services to both clients and ERPA's field consultants and has expertise in all aspects of PeopleSoft. In support of field consultants, the COE ensures that all ERPA consultants have access to immediate assistance and information to address unexpected requirements that fall outside of an individual's sphere of expertise.

As a client-centered IT services firm, ERPA's service offerings are structured to provide the flexibility, adaptability, and responsiveness essential to meeting the unique needs of its clients. ERPA's mission is to deliver significant value by leveraging innovation and deep industry and technology expertise to maximize client systems. Consistent, concerted, focus on this mission goal has resulted in ERPA being named within the Inc. 500/5000 lists of '*fastest growing companies in the nation'* a total of ten (10) times; an achievement that attests to successful performance, satisfied clients, and financial stability.

ERPA has the depth and breadth of consultants to meet James Madison University's staffing needs. ERPA has a resource pool of over 400 US-based consultant employees and 2,000+ pre-qualified resources from which it draws consulting experience and satisfies staffing needs. This growing talent pool has allowed ERPA's staffing business to represent approximately 80% of its annual revenue.

Over the past two (2) years, ERPA has placed over 1,700 consultants across 820 client sites for various technologies and skillsets.

Resumes. Representative resumes are provided within Appendix A.

4. OFFEROR DATA SHEET (ATTACHMENT A)

4. Offeror Data Sheet, included as Attachment A to this RFP. (RFP Section V, [B], Question 4)

ATTACHMENT A

OFFEROR DATA SHEET

TO BE COMPLETED BY OFFEROR

1. QUALIFICATIONS OF OFFEROR: Offerors must have the capability and capacity in all respects to fully satisfy the contractual requirements.

2. YEARS IN BUSINESS: Indicate the length of time you have been in business providing these types of goods and services.

   Years 23 Months 11

3. REFERENCES: Indicate below a listing of at least five (5) organizations, either commercial or governmental/educational, that your agency is servicing. Include the name and address of the person the purchasing agency has your permission to contact.

CLIENT	LENGTH OF SERVICE	ADDRESS	CONTACT PERSON/PHONE #
Los Angeles Community College District (LACCD)	3/2018 - ongoing	770 Wilshire Blvd. Los Angeles, CA 90017	Albert Saryan 213.891.2301
California State University System – Los Angeles	1/2018 – 12/2020	5151 State University Drive Los Angeles, CA 90032	Tosha Pham 949.346.6623
University of California Santa Barbara	5/2018 - ongoing	3201 University Road Santa Barbara, CA 93106	Bruce Miller 805.893.2380
Illinois State University	7/2019 - ongoing	100 S. Fell Avenue, Ste. D Normal, IL 61761	Todd Smoak 309.438.2111
University of Texas Systems	11/022 - ongoing	210 West 7th Street Austin, TX 78701	Scott Willett 469.284.7414

4. List full names and addresses of Offeror and any branch offices which may be responsible for administering the contract.
   Offeror full name: ERP Analysts, Inc.
   Address: 425 Metro Place North, Suite 510, Dublin, OH 43017

5. RELATIONSHIP WITH THE COMMONWEALTH OF VIRGINIA: Is any member of the firm an employee of the Commonwealth of Virginia who has a personal interest in this contract pursuant to the CODE OF VIRGINIA, SECTION 2.2-3100 – 3131?
   [ ] YES [X] NO
   IF YES, EXPLAIN:

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5. SMALL BUSINESS SUBCONTRACTING PLAN (ATTACHMENT B)

5. Small Business Subcontracting Plan, included as Attachment B to this RFP. Offeror shall provide a Small Business Subcontracting plan which summarizes the planned utilization of Department of Small Business and Supplier Diversity (SBSD)-certified small businesses which include businesses owned by women and minorities, when they have received Department of Small Business and Supplier Diversity (SBSD) small business certification, under the contract to be awarded as a result of this solicitation. (RFP Section V, [B], Question 5)

ATTACHMENT B

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Offeror Name: **ERP Analysts, Inc.** **Preparer Name:** **Doug Hahn**

Date: **8/2/2023**

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes_____ No__X___
If yes, certification number: _____ Certification date: _____

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes_____ No__X___
If yes, certification number: _____ Certification date:_____

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes____ No__X___
If yes, certification number: _____ Certification date:_____

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes_____ No__X___
If yes, certification number: _____ Certification date: _____

Instructions: *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWAMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

Small Business: "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of $10 million or less averaged over the previous three years.

Woman-Owned Business Enterprise: A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified women-owned businesses are also a small business enterprise.**

Minority-Owned Business Enterprise: A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified minority-owned businesses are also a small business enterprise.**

Micro Business is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees **AND** no more than $3 million in average annual revenue over the three-year period prior to their certification.

All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWAM program. Certification applications are available through SBSD at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at http://www.sbsd.virginia.gov/ (Customer Service).

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ATTACHMENT B (CNT'D)
Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Procurement Name and Number: Information Technology Consulting Services / RFP# FDC-1175 Date Form Completed: 8/2/2023

Listing of Sub-Contractors, to include, Small, Woman Owned and Minority Owned Businesses
for this Proposal and Subsequent Contract

Offeror / Proposer:
ERP Analysts, Inc. (Firm) | 425 Metro Place North, Suite 510, Dublin, OH 43017 (Address) | Doug Hahn / (614) 401 - 6841 (Contact Person/No.)

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount (to include change orders)	Total Dollars Paid Subcontractor to date (to be submitted with request for payment from JMU)
N/A					

(Form shall be submitted with proposal and if awarded, again with submission of each request for payment)

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6. COMPANY SALES WITH VASCUPP MEMBERS

6.Identify the amount of sales your company had during the last twelve months with each VASCUPP Member Institution. A list of VASCUPP Members can be found at: www.VASCUPP.org. (RFP Section V, [B], Question 6)

ERPA has no sales with VASCUPP members to report.

7. PROPOSED COST & PRICING SCHEDULE (ATTACHMENT D)

7. Proposed Cost. See Section X. Pricing Schedule of this Request for Proposal. (RFP Section V, [B], Question 7)

7.1 PRICING SCHEDULE (RFP ATTACHMENT D)

The Offeror shall provide onsite and offsite hourly rates broken down by position type for the proposed services. Onsite hourly rates shall include all billables (e.g., travel, lodging, meals, etc.). See Attachment D.

Please find the Attachment D – Pricing Schedule on next page.

In addition to completing Attachment D, the Offeror shall also provide pricing for all other services, including training offerings.

Other services that can be provided by ERPA outside of original roles posted on Attachment D are included on the second page of Attachment D in this response.

Specify any associated charge card processing fees, if applicable, to be billed to the university. Vendors shall provide their VISA registration number when indicating charge card processing fees. Any vendor requiring information on VISA registration may refer to https://usa.visa.com/support/small-business/regulations-fees.html and for questions https://usa.visa.com/dam/VCOM/global/support-legal/documents/merchant-surcharging-qa-for-web.pdf.

ERPA is not able to accept charge card payments at this time therefore processing fees are not applicable.

Attachment D – Pricing Schedule

For each technology/category listed below, provide your company's hourly rate for each of the three roles listed. If you refer to the role by a different name, list it in the space provided next to the corresponding role. Onsite pricing must be inclusive of all billables (travel, lodging, meals, etc.)

***** ***The Offeror shall also provide onsite and offsite pricing for all other services/roles not listed below, including training offerings.*** *****

Oracle Core Technologies		
Project Manager or _____	$210 /hr.	$175 /hr.
Senior Engineer or _____	$175 /hr.	$140 /hr.
Engineer or _____	$165 /hr.	$130 /hr.
Oracle/PeopleSoft Enterprise Solutions		
Project Manager or _____	$210 /hr.	$175 /hr.
Senior Engineer or _Sr Techno-Functional_	$200 /hr.	$165 /hr.
Engineer or _ Techno-Functional _	$170 /hr.	$140 /hr.
Desktop and Mobile Device Management		
Project Manager or _____	$140 /hr.	$105 /hr.
Senior Engineer or _____	$120 /hr.	$ 85 /hr..
Engineer or _____	$ 95 /hr.	$ 60 /hr.
Microsoft Azure and M365		
Project Manager or _____	$185 /hr.	$150 /hr.
Senior Engineer or _____	$160 /hr.	$125 /hr.
Engineer or _____	$130 /hr.	$ 95 /hr.
Okta		
Project Manager or _____	$185 /hr.	$150 /hr.
Senior Engineer or _____	$165 /hr.	$130 /hr.
Engineer or _____	$145 /hr.	$110 /hr.
Data Analytics/Visualization/Warehouse/Lake		
Project Manager or _____	$210 /hr.	$175 /hr.
Senior Engineer or _____	$150 /hr.	$115 /hr.
Engineer or _____	$140 /hr.	$105 /hr.

Change Management Training, Svcs, & Cert.		
Project Manager or _____	$210 /hr.	$175 /hr.
Senior Engineer or _____	$180 /hr.	$155 /hr.
Engineer or _____	$165 /hr.	$130 /hr.
Security and Federation Services		
Project Manager or _____	$210 /hr.	$175 /hr.
Senior Engineer or _____	$165 /hr.	$130 /hr.
Engineer or _____	$145 /hr.	$110 /hr.
Cisco Technologies, Infrastructure Support, and Virtualization		
Project Manager or _____	$190 /hr.	$155 /hr.
Senior Engineer or _____	$170 /hr.	$135 /hr.
Engineer or _____	$160 /hr.	$125 /hr.
Audio Visual Technologies		
Project Manager or _____	NA /hr.	NA /hr.
Senior Engineer or _____	NA /hr.	NA /hr.
Engineer or _____	NA /hr.	NA /hr.
Secure Research Enclaves		
Project Manager or _____	NA /hr.	NA /hr.
Senior Engineer or _____	NA /hr.	NA /hr.
Engineer or _____	NA /hr.	NA /hr.
Other Technology (listed in specific categories/roles on next page)		
Project Manager or __see following page__	_____/hr.	_____/hr.
Senior Engineer or __see following page__	_____/hr.	_____/hr.
Engineer or __see following page__	_____/hr.	_____/hr.

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ADDITIONAL ROLES – OTHER TECHNOLOGY

	Onsite	Offsite
Workday Technologies		
Project Manager or _____	$220 /hr.	$185 /hr.
Senior Engineer or _____	$175 /hr.	$140 /hr.
Engineer or _____	$165 /hr.	$130 /hr.
Salesforce		
Project Manager or _____	$210 /hr.	$175 /hr.
Senior Engineer or _____	$175 /hr.	$140 /hr.
Engineer or _____	$165 /hr.	$130 /hr.

	Onsite	Offsite
Data Integrations		
Project Manager or _____	$210 /hr.	$175 /hr.
Senior Engineer or _____	$175 /hr.	$140 /hr.
Engineer or _____	$165 /hr.	$130 /hr.

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8. APPENDIX A: RESUMES

8.1 SEAN L. – PROJECT MANAGER

Summary

An accomplished IT professional with over 20 years of PeopleSoft experience in both domestic and international implementations. Responsibilities have included all aspects of the system life cycle: requirements definition, fit/gap analysis, business process design, build, testing design and execution, training, implementation, and production support.

Skills

- **Tools:** Application Designer, SQL/SQR, Security Administrator, BI Publisher, Query

Professional Experience

City of Boston (Boston, MA)
PeopleSoft HCM and Financials AWS Migration, PeopleTools Upgrade, and Financials Application Upgrade (9.1 to 9.2)
Project Manager

- Developed and rolled out Project Management toolset using Smartsheet.
- Worked with client to develop and deliver kick-off presentations to both the Steering Committee and project team.
- Represented both ERPA and client interests on the project until approximately 3 months into project when a client Project Manager was added to the team.
- Facilitated regular communication between City of Boston and ERPA resources.
- Performed regular status reporting at multiple project levels, i.e., internal ERPA, joint ERPA/Boston, and Steering Committee.
- Established All Hands communication structure to keep extended stakeholders engaged in project.

University of Utah (Salt Lake City, UT)
Oracle Student Management Cloud
Project Manager/PeopleSoft Functional Lead

- Managed implementation of Oracle Student Management Cloud (SMC) for the University of Utah Continuing Education group.
- Facilitated shared development with another client implementing SMC at the same time.
- Assisted with the functional design of integration between SMC and PeopleSoft Financials.
- Regularly monitored and escalated critical and blocker issues to Oracle on behalf of the University.
- Maintained positive working relationship with client even when faced with severe system limitations which resulted in the delay of project go-live.

City of Hope (Los Angeles, CA)
PeopleSoft 9.2 Upgrade

- In November 2019, client decided to replace Project Manager
- Rapidly came up to speed in the middle of System Integration Testing Cycle 1. Worked with project leadership to revise project plan, testing approach, and other aspects of the project that had previously resulted in client dissatisfaction.
- Assessed status of remaining open development and quality of testing. Ultimately recommended to project leadership that team was unlikely to meet planned go-live date. Coordinated project replan, including addition of second System Integration Testing cycle (SIT 2).
- Led development of cutover migration plan which included coordination of functional, technical, and infrastructure teams, along with end users for post live system validation.

- Assisted in preparation of weekly status report, Steering Committee presentations and bi-weekly project stakeholder updates.
- Reorganized weekly team status meetings to make them more useful tool for managing project and facilitating cross-team coordination.
- Received positive feedback from client leadership and project team that my addition to the project was a significant improvement and that it contributed to the project's turnaround.

Alberta Health Services (Calgary, AB Canada)
PeopleSoft HCM 9.2 Upgrade

- AHS provides healthcare for the entire province of Alberta, Canada and has over 120,000 employees.
- AHS engaged in a project to upgrade from version 8.8 to 9.2. Project included a double-hop upgrade from PS 8.8 to 9.1 and 9.1 to 9.2, two PeopleTools upgrades, a significant amount of custom data conversion, and an in-housing of system architecture from hosting vendor.
- Client replaced both client and consulting project managers in the middle of the project and at nearly the same time. I joined client toward the end of the Development phase and had to quickly get up to speed.
- New client project manager resigned after approximately 4 months; assumed primary PM
- Led client through replanning when it became apparent that go-live date was not achievable. Replanning efforts culminated in team-wide meeting with +50 participants across all project teams.
- Worked with client to manage project impacts from multiple competing initiatives, e.g. the addition of a new company into the Production system, a Taleo upgrade, and business-as-usual operations.
- Navigated a complex project organizational and reporting structure. As an example, Steering Committee meetings were required every two weeks and were two hours in duration.
- Led client through remainder of Development, Testing (3 System Integration Testing cycles, 1 User Acceptance Testing cycle, 1 Year-End Testing cycle, and 1 Payroll Simulation Testing cycle), Pre-Cutover, Cutover, and Post-Implementation Support phases.
- AHS went through over 8 project managers over the course of the project. Overall team included well over 200 people including consultants and client.

Quest Diagnostics (Long-term client > 9 years)
PeopleSoft 9.2 Upgrade

- Managed team of 2 functional leads, 1 upgrade specialist, and 10 developers in a project to upgrade from PeopleSoft 9.1 to 9.2 (Image 25). Project also included a Tools upgrade from 8.52.07 to 8.55.18 and an upgrade from Oracle 11g to 12c. Project included over 600 "customizations" with thousands of impacted PeopleSoft and external file objects.
- Coordinated with client project manager and other client team members as appropriate, e.g. infrastructure, DBA, business users, etc.
- Regularly reported status to client project leadership.
- Coordinated Production support activities post-go-live for defect remediation. Oversaw transition to PUM methodology, coordinating knowledge transfer between Upgrade Specialist and client PeopleSoft Admin for ongoing bug-fix maintenance.

Educational Testing Services
PeopleSoft 9.1 FSCM Enhancement

- Client did not want to use PeopleSoft Excel-to-CI functionality for uploading vouchers
- Worked with client to define requirements for a custom upload tool.
- Developed functional specifications and worked with developer to develop and unit test new tool.
- Developed training material and coordinated end-user testing.

Q² Solutions (a joint venture between Quintiles and Quest Diagnostics)
PeopleSoft 9.2 FSCM Implementation – Project Manager

- Managed team of 3 functional leads and 6 developers in a project that integrated the business processes of two companies into a new joint venture.
- Coordinated efforts with users in California, Atlanta, London, and Edinburgh.
- Developed, maintained, and managed project plan. Coordinated with PMO and overall IT Project Management regarding related projects under the joint venture umbrella.
- Assisted functional leads in areas of Projects, Contracts, Accounts Receivable, Billing, Order Management, Manufacturing, and Inventory.
- Served as one of primary liaisons between Quest Diagnostics and Quintiles given my 10-year history with Quest Diagnostics users and my familiarity with their systems and business processes.

Navigant Consulting
PeopleSoft 9.2 FSCM Implementation – Testing Coordination

- Joined project in role of testing coordinator. Organized existing testing materials and developed a dashboard for daily reporting of testing metrics.
- Assumed ownership of the testing defect log. Coordinated with project management, functional leads, and developers to push the timely resolution of over 500 defects.
- Assisted with defect resolution as time permitted.
- Led separate daily meetings with functional leads, developers, and testers to help keep the testing schedule on-track.

Asplundh
PeopleSoft 9.2 FSCM Implementation – Australia / New Zealand

- Replaced resource as functional lead for Accounts Receivable/Billing modules and co-lead for Project Costing/Contracts modules late in the project.
- Addressed deficiencies in the project, e.g. conversion (customers, contacts, open AR balances, and project rate sets), month-end reconciliation, VAT reporting, invoice layout design, and security.
- Documented key PeopleSoft Contracts-to-Cash business processes and trained users.
- Reviewed and updated VAT configuration for Australia and New Zealand Business Units and documented month-end VAT reporting procedures.
- Developed and worked with users to execute testing/training plan.

Quest Diagnostics (Long-term client > 9 years)
PeopleSoft 9.1 HCM Enhancements initiative

- Was asked to take over project management responsibilities for a series of HCM enhancements coinciding with the centralization of HR functions into a Service Center model.
- Project was responsible for delivering over 20 enhancements ranging from simplified page modifications to complex health vendor interfaces for things such as health and 401(k) benefits, Cobra/Hipaa, life insurance, and dependent verification.
- Developed and maintained project plan over duration of project.
- Coordinated with project sponsor and business owners to roll out functionality in a series of releases designed to minimize disruption to business users.
- Coordinated testing activities for all enhancements with the appropriate end-users. Tracked all testing documentation for project audit purposes.
- Developed pre-go-live checklists and implementation plans for each release to ensure enhancements were ready to move into Production.
- Monitored project spend against budget and assisted client in planning for future phases of the project.

PeopleSoft 9.1 Supply Planning implementation

- Served as project manager for initiative to implement custom forecasting functionality for client clinical trial testing kits as well as to implement PeopleSoft's Supply Planning module to support resupply of kit components.
- Developed and maintained project plan over duration of project.
- Led weekly project team status meetings and regularly reported project status to Project Office and Steering Committee groups.
- Coordinated resources on US East and West Coasts as well as in United Kingdom.
- Project resulted in delivery of competitive advantage-providing functionality to automatically replenish client clinical testing supplies.

PeopleSoft Financials 9.1 upgrade

- Served as project manager for initiative to upgrade from version 9.0 to 9.1 FP2. Impacted modules: AM, AP, AR, BI, GL, IN, MFG, OM, and PO. Project included nearly 600 "customizations" (over 25,000 customized objects), interfaces, and reports.
- Developed and maintained project plan over duration of project.
- Utilized Agile Scrum methodology to accelerate development efforts to meet required timeline.
- Coordinated activities of functional, technical, and infrastructure teams. Managed both ESG and client resources.
- Led weekly project team status meetings and provided upward feedback to Project Office and Steering Committee groups.

PeopleSoft 9.0 Supply Chain Enhancements

- Served as project manager for initiative to implement custom Commercial/Proforma invoice documentation to accompany supply shipments to foreign countries.
- Led weekly project team status meetings and regularly reported project status to Project Office and Steering Committee groups.
- Coordinated resources on US East and West Coasts as well as in United Kingdom.
- Project resulted in business standardizing what is currently a manual, time-consuming customer-specific process today.

Education/Certifications/Training

- B.S. Business Administration, University of Florida
- Oracle Cloud Practitioner Certified
- Agile Scrum Master training/certification

8.2 JOHN R. – PROJECT MANAGER

Summary

With over 25 years of ERP Consulting experience, I am a customer focused, performance driven leader with a solid track record of success implementing state of the art solutions exceeding customer expectations. Experienced with PeopleSoft and Workday– as both an implementer and everyday end-user. I am a good communicator, always cognizant of my audience – capable of working with executives, business owners, functional users, technical developers, and systems engineers.

Client Focus

Extensive experience in customer success and satisfaction. I am a diplomatic, decisive, professional who understands the concept of discretion and confidentiality. I partner with my client management teams and often become a "Trusted Advisor" setting realistic direction, time frames, and resource plans on projects, as well as developing longer term strategies for future projects. I identify opportunities and propose solutions to streamline processes, automate workflows, save the client time, money, and reduce effort while increasing performance. Each successful project strengthens our relationship, leading to account growth through new services, additional consultants, and extensions to fulfill ever-changing client needs.

Project Management

Extensive experience managing cross-functional teams working with clients who vary in size (and complexity) from 500 employees to several hundred thousand employees. Projects have included implementations, upgrades, assessments, audits, and custom development. The majority of projects have been in the PeopleSoft HCM (HR, Benefits and Payroll) area, but I recently have been involved in active management of three different PeopleSoft 9.2 Campus Solutions Upgrades, a functional assessment of Campus Solutions, two different PeopleSoft FIN Upgrades, and one intense Workday Launch implementation of Core HCM, Financials, Projects, Expenses, Time Tracking, Absence Management, Performance and Development, Recruiting, Benefits and Payroll.

Professional Experience

ERP Analysts, Inc. 2018-Present
Director, Project Management

Focused on leading and providing consistent Project Management to ensure smooth and successful projects, on schedule, and within budget. I partner with Business Development in the sales cycle for scoping, estimating, effort and resource planning, laying out schedules and timelines, coordinating teams, and identifying opportunities for new work, extensions, and additional resource placements. I participate in weekly Customer Success team reviews of existing accounts, and onsite client Quarterly Business Reviews. Actively manage select projects, including the development of statement of work, project and staffing plans, timelines, deliverable inventory, and risk mitigation strategy, utilizing best practices throughout the project lifecycle. Provide consistent, but flexible and scalable project management, tailored to each client's needs, and budget.

Project Management Portfolio:

- **United States Merchant Marine Academy -** Currently serving as the project manager for a PS 9.2 Campus Solutions implementation, for the following modules - Admissions, Academic Advising, Student Records, Student Financials, and Financial Aid - in a hosted AWS GovCloud environment. This project included a custom developed Admissions front-end for collecting Prospects, and an online application for Applicants. Guided the team through the DOT/MARAD ATO Security Assessment process.
- **AccelerEd (UMGC) -** Currently managing the implementation of PS Fluid for Student Facing functionality of a 9.2 Campus Solutions production system.

- Lower Colorado River Authority - Served in a PM oversight role for the Implementation of an Online Payment Portal and custom integration with Paymentus - a third party electronic bill pay system.
- University of Maine - Served as the company liaison/project coordinator for the implementation of PeopleSoft AR and Billing module.
- **Cerritos College, Norwalk, CA –** Managed the implementation of Cal Grants automated processing in PS 9.2 Campus Solutions – January 2020. (~25,000 active students)
- **Los Angeles Community College District (LACCD), Los Angeles, CA –** Managed multiple simultaneous and successful initiatives including the concurrent PeopleSoft 9.2 Campus Solutions upgrade, implementation Fluid-As-A-Service (FaaS), and Security-As-A-Service (SECaaS), which in combination allowed LACCD to decommission their portal and allowed students to access their newly upgraded SIS system via mobile devices (phones and tablets). Partnered and worked closely with LACCD project executives and management team to ensure our combined team had the right level of staffing and support in all functional and technical areas, and kept the project moving forward, through many challenges. Developed and managed the Project Plan, hosted weekly status meeting, and prepared weekly status reports. Identified and tracked issues, mitigated risks, co-managed the development effort of the remote ERPA Lab resources and onsite developers. Coordinated all efforts between the LACCD Systems Engineering group and the ERPA Lab for infrastructure, security, system admin, and database admin areas. Co-managed a joint team of 45 resources including ERPA functional, technical, onsite consultants, remote lab developers, remote system support, LACCD business analysts, developers and systems engineers. Maintained regular communications with Project Sponsor/Executives, and brought this project live in October 2019. Managed the project's consulting budget and timeline; managed scope and prepared change orders as necessary. Worked with the ERPA Lab to ensure LACCD received the appropriate level of service and documentation, and the onsite team's change management and training materials. LACCD is the largest community college district in the United States with 9 colleges, and ~125,000 students.
- **Cerritos College, Norwalk, CA -** Managed a functional team conducting a 9.2 Campus Solutions Assessment of their 10+ year old PeopleSoft system, which had been upgraded multiple times without embracing new functionality. The assessment was commissioned to learn how to optimize their system, and how to set up an appropriate system governance model. – August 2019.
- **City of Boston, Boston, MA -** Served in an Account Management/Engagement Management/Executive Oversight role for the City of Boston, for several different PeopleSoft initiatives including Technical Managed Services, functional HCM, and ACA Benefits consulting for the City, Technical/Functional consulting for Boston Public Schools, and a Security Assessment.
- **Cerritos College, Norwalk, CA -** Managed the successful, on-time remote lab technical grade to 9.2 for PeopleSoft Campus Solutions, HR and Portal, which went live in July 2019.
- **University of Maine, Orono ME -** Served as a company liaison/project coordinator for the PeopleSoft Campus Solutions 9.2 upgrade team including both ERPA Center of Excellence Lab resources and onsite functional and technical consultants. Additional projects at UMS included Testing as a Service (TaaS) and a custom development project - SQR Runner Replacement. (~11,000 active students)
- **Frederick County, Frederick, MD -** Managed the PS 9.2 Financials Upgrade for Frederick County, coordinating the efforts of the ERPA Center of Excellence Lab, and onsite consultants. (~43,000 active students)
- **ERP Analysts, Inc., Dublin, OH –** Led and managed the Workday Launch Implementation of Core HCM, Financials, Projects, Expenses, Time Tracking, Absence Management, Performance and Development, Recruiting, Benefits and Payroll with a very small (but empowered) team, on a very aggressive 7-month schedule for an IT Consulting firm of ~650 employees. Use WD daily for time, expenses, HR, Benefits and Payroll.

Sierra-Cedar (formerly CedarCrestone) 2010 – 2017
Professional Services Director, Commercial

- Responsible for the daily operations of the commercial Human Capital Management practice. Directly supervised and co-managed up to 150 highly skilled, talented HCM (HR, Benefits, Recruiting, and Payroll) functional, technical, and project management consultants across North America, ensuring best practices were employed, deadlines were met, and employees functioned with a sense of urgency. Fostered positive work culture. Built and managed cohesive project teams. Strategized with executives and collaborated with recruiters to forecast business needs to assure a steady supply of quality candidates. Utilized PeopleSoft Resource Management and Taleo Recruiting systems. Worked in partnership with peers in other internal business units to collaborate on maximizing the utilization for the commercial industry and company.
- Partnered with HR and recruiting to attract and retain highly skilled subject matter experts.
- Partnered with Sales, and back office to balance fluid staffing levels, utilization, and workflow.
- Collaborated with peer Directors to maximize resource utilization across the company.
- Managed the use and onboarding of H1-B and offshore resources as operational demands necessitated.
- Constructed and managed successful project teams of complimentary skilled functional subject matter experts, technical, project management, and management consulting resources for onsite client placement and integration with the client team.
- Supported and mentored direct reports as needed on internal processes or for professional growth.
- Communicated project goals, success factors, client expectations, consultant roles and responsibilities at the start of each project and reminded team members throughout the project.
- Monitored project health, client culture, team dynamics, personalities, travel demands, and consultant well-being. Tweaked the team composition as required, and modified management style to align with client culture and combined team dynamics.
- Monitored Project Management practices and processes, to ensure compliance with our Project Management methodology, and to maximize efficiencies, sharing tools templates and knowledge.

CedarCrestone (formerly Cedar, Renaissance and The Hunter Group) 1993 – 2010
Delivery Services Director, Public Sector

Managed the operations, logistics, staffing, client account management, and administrative duties for service delivery. Supervised consultants staffed all Public Sector projects across North America. Collaborated with peer Directors to allocate resources and maximize utilization. Responsible for account/engagement management, sales and networking, trade shows, and client relationship building. Provided proposals, RFP responses and estimates on project costs, timelines and milestones. Negotiated, and assisted in preparation and review of contracts. Liaised all communications between the client and the company, creating a "Trusted Advisor" role, and ensuring positive customer satisfaction. Maintained customer reference ability. Provided executive oversight and attended steering committee meetings.

Grew existing account footprints thru project expansions/resource extensions. Familiar with the nuances, pace, and processes of Public Sector procurements and budgeting cycles.

Directly supervised 50 dedicated public sector consultants, including functional PeopleSoft HRMS and Financial, management consultants, project managers and technical consultants. Over-saw the 20 person Oracle EBS practice as well. Handled performance appraisals and salary reviews, oversaw HR and payroll administrative functions, time and expense approvals, spearheaded training and professional development/education initiatives. Mentored employees as needed.

- Responsible for staffing all Public Sector accounts, in PeopleSoft HCM, Financials, and Oracle EBS realms – for clients ranging from 500 employees (Boston Water and Sewer Commission) to several

New York state agencies with several hundred thousand employees (NYOSC, NYSTRS) and many in between – (ESDC, NYWCB, NYNYCAPS, PANJY)

- Served as Account Executive for numerous large strategic accounts including General Electric, US Food and Drug Administration, City of Boston, and others, often simultaneously with other projects.
- Managed multiple accounts/engagements ensuring customer satisfaction/success and that the projects completed as scheduled and budgeted in the Statement of Work, following our standard System Development Life Cycle Methodology (Plan, Analyze/Design, Develop, Test/Train, Deploy, Support).
- Participated in all phases of projects – from pre-sales activities through completion, including solution architecting, project planning, staffing, project timelines and milestones, pricing and budgeting and crafting RFP responses.
- Proactively managed and mitigated risks and was used to rescue projects in distress and resolve client relationship issues.
- Managed transition through multiple mergers and acquisitions, retaining a highly skilled talent pool.
- Consistently maintained low consultant turnover rates through open and honest communications, fostering a positive work environment, and investing in employees and their personal development.
- Cultivated many top performing "High Achievers" on a consistent basis.
- Participated in blending project management and systems development lifecycle methodologies to reap synergy and efficiency as the company grew through mergers and acquisitions to ensure a consistent approach and methodology across projects.

Education

- Bachelor of Science in Information Systems Management,
- University of Maryland - Baltimore County, (UMBC) Baltimore, MD

8.3 RAHUL T. – PEOPLESOFT DEVELOPER

Summary

- 13 years of experience in IT includes extensive experience in Design, Development, Testing, Upgrade, Implementation, and Production Support of PeopleSoft FSCM/ HCM /CRM Applications.
- Strong Functional experience in PeopleSoft FSCM Billing, Accounts Receivables, Project Costing, Contracts, General Ledgers, Accounts Payable, Commitment Control.
- Expertise in Customizations, Conversions, Interfaces, and Implementation of PeopleSoft FSCM (Accounts Receivable, Purchasing, Accounts Payable, Cash Management) 9.2/9.0/8.9 modules, PeopleSoft HRMS 9.2/9.1/9.0/8.9/8.3 (Payroll, Workforce Administration, Recruiting, Time and Labor) modules, PeopleSoft CRM 9.0 (Support, Helpdesk, Case Management) modules and PeopleSoft ELM 9.0 (Learning Catalog, Enrolling Learners, Managing Attendance) modules.
- Excellent knowledge in People Tools (Application Designer, People Code, Application Engine, Component Interface, Integration Broker, File Layout, Application Package, Process Scheduler, PeopleSoft Query, Data Mover), SQR, and BI Publisher.
- Strong RDBMS like Oracle, SQL Server, and SQL and PL/SQL skills.
- Extensively worked on transferring existing data from legacy system to PeopleSoft application database tables using SQRs, Component Interfaces, Application Engine, and File Layouts.
- Extensively worked with Security Administrator to implement security in various levels like User Profiles, Creating Roles, Permission Lists, Portal Security, folders, Content References, and Definition Security.
- Experience in troubleshooting problems in PeopleSoft and performing Impact analysis.
- Part of RFP (Request for Proposal) Team; actively involved in developing Response Documents for PeopleSoft RFPs.

Skills

ERP	PeopleSoft FSCM 9.2/9.0/8.9, PeopleSoft HRMS 9.2/9.0/8.9/8.3
PeopleTools	PeopleTools 8.18, 8.48, 8.49,8.51,8.53,8.54,8.55,8.56,8.58 (Application Designer, People Code, Application Engine, Change Assistant, File Layout, Component Interface, Integration Broker, Workflow, Data Mover)
PeopleSoft Modules	FSCM: Purchasing, Accounts Payable, Accounts Receivable, Billing, Cash Management, Project Costing. HRMS: Human Resources, Time and Labor, Payroll. CRM: Helpdesk, Support, Case Management.
Reporting Tools	SQR, PS Query, XML Publisher.
Integration Tools	File Layout, Component Interface, Integration Broker.
Databases	Oracle 10g/11g/12c/19c, SQL Server 2000, IBM DB2
Languages	SQL, PL/SQL, C, Java.
Data Management & Batch Processing Tools	Data Mover, Application Engine, and Process Scheduler.
Development Tools	TOAD, SQL Developer, SQL Analyzer.

Professional Experience

City of Raleigh **Mar 2016 - Till date**
PeopleSoft FSCM 9.2 / HCM 9.2
Technical Lead.

- Providing support to end users with effective resolution and timely response and ensuring compliance, addressing end users' functional issues/queries on both Product and Process.
- Responsible for Retrofits and Security while applying HCM PUM Image 36
- Implemented Fluid for HCM and FIN applications.

- Eliminated PeopleSoft Interaction Hub (Portal Solutions) by implementing Unified Navigation between HCM and FIN application making HCM as landing env.
- Implemented Payable Time Approval Archival process for fixing performance issues on Approval Tiles.
- Customized and Developed Self Service pages as per client requirements.
- Lead the development effort for ePerformance Implementation.
- Customized ePerformance Pages as per business requirements.
- Implemented workflow for Performance documents approvals.
- Lead the development effort and Implemented Integrations between DocuSign and PeopleSoft.
- Responsible for Retrofits and Security while applying FIN PUM Image 19, HCM PUM Image 20, FIN PUM Image 29.
- Resolved issues during UAT phase of PUM Application.
- Configured and Implemented Assets Mass Transfers from one departments to others.
- Resolved issues related to Vouchers, Purchase Orders, Requisitions Approval Workflows, eSupplier Registration.
- Worked on Customizations to Create/Update Stock Request page to search the item with Long Description.
- Customized PO Activity Report to include additional columns as per business requirement.
- Customized Bank Statement Workflow Application Engine to send email notifications to Employees as per business requirements.
- Tuned PS Queries to improve performance.
- Customized PeopleCode to improve performance on Department Budget Table search page.
- Developed Inbound Interface to load data from bank file to Benefit Plan Loan details and Payroll Deduction details.
- Customized Supplier Registration pages as per business requirements.
- Developed Outbound Interface for Vouchers Payments data to send file to CC&B System.
- Using Integration broker, integrated PMIS system with PeopleSoft system to load project manager information and send response back to PMIS system.
- Developed Web Services to provide PeopleSoft data (Projects, Inventory) to third-party systems.
- Developed Report Engine to present Supplier contracts, Purchase Orders, Receipts and Vouchers, Payments information in Single Report.
- Developed BI XMLP reports to present Supplier Contract Cycle Time for end-to-end Process, Contract Start to Execution.
- Developed BI XMLP report to present Contract Workflow Cycle Time for any Contract or Range of Contracts
- Developed BI XMLP report to present Contract Workflow Cycle Time only for Contracts CURRENTLY In Workflow.
- Implemented DocuSign Integration with PeopleSoft
- Developed Application Process to convert Pending Supplier Registrations to Bidders.
- Customized Bidder to Supplier Conversion component to send notification to Suppliers.
- Developed several custom components during eSupplier portal implements.
- Customized Supplier Change Request pages as per business requirements.
- Developed Fluid Home Pages during PeopleTools 8.56 upgrade.
- Worked on Fluid pages security.
- Developed Outbound Interface to send Employees Census File to Bank.
- Build a custom interface to display Voucher Approval History along with approval comments in a Grid.

- Provided Technical Training on PeopleSoft Workflow and Approval Workflow Engine to City of Raleigh IT team.
- PeopleSoft FSCM 9.2, PeopleSoft HCM 9.2, PeopleTools 8.54/8.56, Oracle 11g/12c.

Lower Colorado River Authority **Nov 2018 - Till Date**
PeopleSoft FSCM 9.2 / HCM 9.2
Technical Lead.

- Responsible for Retrofits for FIN PUM Upgrade (Image 36).
- Lead the development for Deal Management module implementation; Developed interfaces to load legacy data into PeopleSoft; developed complex reports for month-end closure validations.
- Resolved issues related to Pay Cycles and Financial Gateway Integrations with Bank.
- Developed an inbound Web service to load approved expenses from Expense Wire system to Voucher staging tables.
- Using Integration broker developed a synchronous web service to integrate PMIS system with PeopleSoft to load project manager information and send response back to PMIS system.
- Developed an outbound web service to integrate project activity and Chart of accounts information.
- Customized Project Organization page as per business requirements
- Developed application engine to load rows into PROJ Resource table from custom Accounting table and called PC Pricing process to price the inserted rows
- Resolved issues on Project budget loads and Finalizing project budgets (PC_WRAPPER process)
- Resolved issue on Refresh Summary Tables Application Engine process (PC_SUM_RFSH)
- Resolved issues related to Time Labor and Project Costing Integration.
- Set up Dunning Letters and customized Dunning process as per business requirements.
- Resolved issues related to Procure to Pay process. (Accounts Payable, Purchase Orders, eProcurement)
- Resolved issues related Credit to Cash Cycle (Billing, Accounts Receivables, Contracts).
- Resolved issues and Provided support during Financial Year End closures.
- Implemented AWE for Vouchers, Purchase Orders, and Journals Approvals.
- Tuned SQLs to improve performance of Custom processes.
- **Environment:** PeopleSoft FSCM 9.2, PeopleSoft HCM 9.2, PeopleTools 8.54/8.56, Oracle 11g/12c.

Los Angeles Community College District **Jul 2019 - Oct 2019**
PeopleSoft Campus 9.2 Upgrade.
PeopleSoft Technical Consultant.

- Responsible for retrofitting Customizations.
- Developed Fluid Home pages, tile, and Navigation collections.
- Customized Class Search and Enroll page, Browse Catalog pages as per clients requirements.
- Resolved performance issues in Academic Advise Report page.
- Developed Custom Fluid page to display current term and previous two terms enrollment dates.
- Resolved issues during SIT and UAT.
- Developed Fluid Home pages, tile, and Navigation collections.

Alaska Airlines **Nov 2017 - Oct 2018**
PeopleSoft FSCM 9.2 Upgrade and eSupplier Portal Implementation
PeopleSoft Technical Consultant.

- Responsible for retrofitting Customizations.
- Responsible for Sys Audits and DDD Audits Cleanup for each upgrade pass.
- Worked on Chartfield Configurator Process.

- Developed Fluid Home Pages, Tiles, and Navigation collections as per business requirements.
- Worked on Customizations and Enhancements as per client requirements.
- Customized delivered Check Print Template as per client requirement.
- Converted custom crystal reports to BI Publisher reports.
- Resolved issues during System Test and User Acceptance Test phases.
- Worked on customizations on Supplier Registration component.
- Configured Approval Process (AWE) for Supplier Registrations, Supplier Change Requests, and New Supplier User accounts creation.
- Developed scripts to migrate eSupplier configurations from one environment to another.
- Worked on security for eSupplier portal and Supplier Users.
- Configured Excel upload utilities for Journals and Vouchers.
- **Environment:** PeopleSoft FSCM 9.1/9.2, PeopleTools 8.54/8.56, Oracle 11g/12c

Alabama State University Sep 2017 - Mar 2018
PeopleSoft FSCM 9.1 to 9.2 Upgrade
Technical Lead.

- Responsible for retrofitting Customizations.
- Worked on Customizations and Enhancements as per client requirements.
- Involved in Sys Audits and DDD Audits Cleanup.
- Customized AP Check Print XMLP Template as per client requirements.
- Converted Custom Crystal reports to BI Publisher reports.
- Provided Technical Trainings to Client IT Team.
- Conducted meetings with Client for Requirements Gathering and Status Updates on the project.
- Assigned Tasks and guided Team members; conducted status meeting and maintained the tasks tracker.
- **Environment:** PeopleSoft FSCM 9.0/9.2, PeopleTools 8.49/8.55, Oracle 11g/12c.

South Carolina State Port Authority Nov 2016 - Aug 2017
PeopleSoft FSCM 9.0 to 9.2 Upgrade
Technical Lead.

- Responsible for retrofitting Customizations.
- Developed Custom Work Center.
- Worked on Chartfield Configurator Process.
- Configured Journal Approval Process (AWE) as per client requirements.
- Worked on Customizations and Enhancements as per client requirements.
- Customized delivered Check Print Template as per client requirement.
- Resolved issues during System Test and User Acceptance Test phases.
- Involved in Sys Audits and DDD Audits Cleanup.
- Customized AP Check Print XMLP Template as per client requirements.
- Rebuild custom crystal reports using BI Publisher.
- Provided Technical Trainings to Client IT Team.
- Conducted meetings with Client for Requirements Gathering and Status Updates on the project.
- Assigned Tasks and guided Team members; conducted status meeting and maintained the tasks tracker.
- Responsible for Maintaining Issues Tracker during System Test and UAT Phase and conduct weekly status meetings with Client.
- **Environment:** PeopleSoft FSCM 9.0/9.2, PeopleTools 8.49/8.55, Oracle 10g/12c.

University of Maine Systems **Feb 2016 – Nov 2016**
PeopleSoft FSCM 9.0 to 9.2 Upgrade
Technical Lead.

- Responsible for retrofitting Customizations.
- Involved in Sys Audits and DDD Audits Cleanup.
- Rebuild custom crystal reports using BI Publisher.
- Customized AP Check Print XMLP Template as per client requirements.
- Resolved issues during UAT phase.
- Post Go Live Production Support.
- Developed Technical Design Documents.
- Conducted meetings with Client for Requirements Gathering and Status Updates on the project.
- Assigned Tasks and guided Team members; conducted status meeting and maintained the tasks tracker.
- Responsible for Maintaining Issues Tracker during System Test and UAT Phase and conduct weekly status meetings with Client.
- **Environment:** PeopleSoft FSCM 9.0/9.2, PeopleTools 8.53/8.54, Oracle 11g

FedEx **Nov 2014 - Dec 2015**
PeopleSoft HCM 9.1
Senior Consultant

- Developed Component Interfaces to Create, Update Employee Personal, Job, and Benefits Information. The data is received from Third Party Systems and loaded through IB Messages.
- Developed Messages to transfer Personal and Job information from PeopleSoft HCM to Third Party Systems (KENEXA and PRISM) using Integration Broker.
- Developed Outbound Interfaces to send Employees Demographic and Job Information to Third Party Systems.
- Production support for daily business transactions.
- Responsible for Unit testing and documenting test Cases for each interface.
- Created Technical Specifications Documents.
- Lead for Offshore team, assigned Tasks, guided Team members and conducted daily status meeting, and maintained the tasks tracker.
- **Environment:** PeopleSoft HCM 9.1, PeopleTools 8.53, Oracle 11g

Franklin Templeton Investments **Jul 2014 - Nov 2014**
PeopleSoft FSCM 9.2
Technical Consultant

- Worked on Conversions/ Interfaces from PeopleSoft FSCM to Workday System.
- Responsible for Unit testing and documenting test Cases for each interface.
- Created Technical Specifications Documents.
- Environment: PeopleSoft FSCM 9.2, PeopleTools 8.54, Oracle 11g

Detroit Public Schools **Dec 2013 - Jul 2014**
PeopleSoft HRMS 8.8 to 9.2 Upgrade, PeopleSoft FSCM 8.4 to 9.2 Upgrade.
Team Lead

- Responsible for retrofitting Customizations.
- Involved in Sys Audits and DDD Audits Cleanup.
- Developed Interfaces to feed data from PeopleSoft HCM system to PeopleSoft FSCM and Active Directory Systems.

- Configured Integration Broker Service Operations, Messages to send data from PeopleSoft FSCM to PeopleSoft HCM for both Batch Publish and Incremental Publish.
- Resolved Technical issues during System Testing Phase in modules like Strategic Sourcing, Grants, General Ledger, Receivables, Purchasing.
- Resolved issues related to Chartfields Combination Editing.
- Worked on Customizations in Grants, Accounts Payable, General Ledger, Accounts Receivables modules to meet client's business process requirements.
- Worked on Excel to CI Uploads to load data for Grants Module.
- Migrated Work Centers from One Environment to another using Data Migration Workbench Tool.
- Resolved Technical issues during System Testing Phase.
- Created and Reviewed Technical Design documents.
- Prepared User Manuals for various business processes like Deposits Excel Upload, Voucher Excel Upload, etc.
- Responsible for business processes unit testing for Grants, Contracts, Billing, Account Receivables modules.
- Assigned Tasks and guided Team members conducted daily status meeting and maintained the tasks tracker.
- **Environment:** PeopleSoft FSCM 8.4/9.2, PeopleSoft HCM 8.8/9.2, PeopleTools 8.49/8.54, Windows 2008 R2, and Oracle 10g/11g.

Republic Bank Limited **Dec 2013 - Mar 2014**
PeopleSoft CRM 9.0
PeopleSoft Technical Consultant

- Developed custom interface to facilitate Accounts and Credit Cards Owner Changes.
- Guided RBL IT Team in scheduling batch process and resolved issues related to Integration Broker.

ITC Infotech India Limited **Oct 2010 - Dec 2013**
FSCM 9.0 Production Support and Enhancements/ Upgrade from FSCM 9.0 to 9.2.
Associate IT Consultant / Lead Consultant (PeopleSoft Techno Functional Consultant)

- Providing support to end users with effective resolution and timely response and ensuring compliance, addressing end users functional issues/queries on both Product and Process.
- Handling issues related to Billing, Accounts Receivables, General Ledgers, Contracts, and Project Costing Modules.
- Involved, identified, and resolved issues related Sub System to Ledger Reconciliation.
- Involved and assisted Finance Team in Translation and Year End Closing Process in PeopleSoft
- Experience in creating Ledger Accounts, mapping accounts to Tree Manager.
- Created New Business Units for Billing and Accounts Receivables modules
- Implemented Revaluation Process for Debtors (Accounts Receivables).
- Created Bill Types, Bill Sources, Invoice Numbering, Payment Terms as per business requirements.
- Assisted End users in creating Project Costing Accounting Rules, Rate Sets, Employees Rates,
- Resolved issues related Contract to Billing Interface Process, Revenue Recognition Process, Pricing Process, Billing Interface Process, ARUPDATE Process.
- Implemented PS Queries Security Cleanup.
- Developed Custom Application Engine process to populate custom table with Out Standing Items/Invoices (Aging of an Item) along with business clusters, verticals, and accounts details which is used as source for OBIE Dashboard Reports.

- Developed Custom Interface to capture Additional Billing Details like Invoice Instruction Date, comments on invoice instruction, invoice submission date (invoice date dispatched to customer), comments on invoice submission; Developed Application Engine Process
- Developed a custom interface for Customer Invoices Bulk Printing.
- Developed Custom Interface to capture Softex and FIRC Details for Invoices with Foreign Currencies and Application Engine Process for uploading same details.
- Developed several PeopleSoft queries reports based on end-user requirements.
- Conducted meetings with end users for requirement gathering, designed Functional Design Documents and Technical Design Documents.
- Performed end-to-end testing when a patch or bundle is applied in system.
- Worked on Application Upgrade from FSCM 9.0 to FSCM 9.2; identifying new features in FSCM 9.2, conducting training sessions to Team Members and End Users.
- Involved in identifying and retrofitting Customizations.
- Environment: PeopleSoft FSCM 9.0/9.2, People Tools 8.49/8.51/8.53, Windows 2008 R2, and Oracle 10g/11g.

Price Waterhouse Coopers, USA. **Jun 2010 - Current**
PeopleSoft HRMS 8.8, HRMS 8.9, Enhancements, and Production Support.
PeopleSoft Technical Consultant

- Involved in enhancements for Custom Partner Deposit Program Application. Developed Custom Application Packages, Components, Pages, Records, PeopleCode in HRMS 8.9
- Involved in enhancements for Custom SQR Report which generates multiple output files.
- Analyzed and Debugged Employee Delete Process (online) in HRMS 8.8
- Developed Technical Design Documents and Test Case Documents.
- Environment: PeopleSoft HRMs 8.8/8.9, People Tools 8.46, Windows NT, and Oracle 10g.

Telecommunication Services of Trinidad and Tobago, West Indies. **Sep 2009 - May 2010**
PeopleSoft HRMS 8.3 to 9.0 Upgrade, PeopleSoft FSCM 8.4 to 9.0 Upgrade
PeopleSoft Developer

- Played key role in development and testing of Interfaces, Online Customizations, and Conversions using (SQRs, Application Engines, and Component Interfaces) for PeopleSoft HRMS and FSCM.
- Developed custom Application Engine process to transform bank files (CCP Layout) to PeopleSoft readable format (PSBD1 Layout)
- Developed a custom interface to load deposit transactions from CIS into PeopleSoft so that they can be matched up against bank statement.
- Implemented Workflow rules for Purchase Order Approval Authorizations and also involved in required functional configuration setup.
- Developed SQR Report to Calculate the Full Annual Pension based on the Compensation rate.
- Developed SQR Report to Calculate the Accumulated Contributions for all the Employees based on the Benefit Plan, Employee Contributions, and year.
- Customizations on Time and Labor Batch Approval Process added field on Batch Approval Process Page and PeopleCode.
- Involved in customizations on Time and Labor Rapid Time Entry Page
- Involved in Customizations for Manager to view his employees leave balances and employee to view their own leave balances.
- Responsible for retrofitting Customizations in HRMS 8.3 to HRMS 9.0
- Involved in Sys Audits and DDD Audits Cleanup for HRMS 9.0
- Extensively worked with Security Administrator in analyzing existing security and creating new roles, permission lists, Content Reference.

- Involved in migration of Trees (import and export using tree mover) and used Tree Auditor and Tree Repair to fix the errors.
- Responsible for Migration activity for Projects over multiple environments
- Developed Technical Design Documents and Test Case Documents.
- **Environment:** PeopleSoft HRMS 8.3/9.0, PeopleSoft FSCM 8.4/9.0, PeopleTools 8.18/8.46/8.49, Windows NT and Oracle 10g.

Great Western Malting, USA **Jan 2009 - Aug 2009**
PeopleSoft FSCM 8.9, Production Support
PeopleSoft Developer

- Modified EDI File Layouts for ACH Wire Payments as per Client Requirements
- Developed Custom Application Engine Process to Convert Bank Statement Layouts to BIA2 File Layouts.
- Added code to delivered SQR POPO005 to customize Dispatched Purchase Order.
- Involved in Workflow setup to set Purchase Order authorizations for Users.
- Customized Purchase Order Approval Amount Page: added a button to transfer page to Purchase Order Add/Update Page.
- Created new reports using PSQuery/Query Manager in Purchasing Module as per Client Requirements.
- Performed Customizations of Pages in Purchasing Module like Adding Fields, Adding PeopleCode to Add new Functionalities according to the User Preferences.
- Involved in development of Application Engine process, which reads data from external systems files using File Layout functionality and PeopleCode.
- Applied Patch Updates.
- Set up Users, roles, Permission Lists to ensure that only authorized users are able to see relevant content.
- Responsible for testing the applications and writing test case documents.
- **Environment:** PeopleSoft FSCM 8.9, People Tools 8.48, Windows NT, and MS SQL Server 2000.

The College of New Jersey, USA. **Oct 2008 - Jan 2009**
PeopleSoft FSCM 9.0, Reimplementation
PeopleSoft Developer

- Implemented Custom Workflow for Purchase Order Approval Process.
- Performed Functional Configurations for Purchase Order Workflow Setup.
- Developed SQR reports and SQL Scripts to migrate data from legacy system to PeopleSoft System for Project Costing Tables.
- Involved in User Security Setup like creating new roles. Permission lists, assigning authorizations for Users, etc.
- Involved in Field Mapping for the tables in Old Release to New release.
- Involved in testing Applications
- Developed Technical Design Documents and Test Case Documents.
- **Environment:** PeopleSoft FSCM 9.0, People Tools 8.49, Windows NT, and Oracle 10g.

8.4 SANTHOSH C. – PEOPLESOFT ADMINISTRATOR

Summary

Over 16+ years of experience in IT and around 14+ years of experience in PeopleSoft System & Security Administration for HRMS/HCM, Financial Supply Chain (FSCM), Campus Solutions (CS), ELM, EPM, Portal (iHub), Student administration and CRM applications on a client/server environment.

- Expertise in installation, configuration, setup, security and management of the PeopleSoft Internet Architecture PIA environment and related processing objects.
- Installed People Tools 8.59,8.58,8.57,8.56,8.55,8.54,8.53, 8.52, 8.51, 8.50, 8.4x, Applications 9.2/9.1/9.0/8.9/8.8/8.3.
- Upgraded PeopleTools and Applications to subsequent versions.
- Worked on PeopleSoft Security on People Tools 8.52, 8.51, 8.50,8.4x/8.1x.
- Involved in implementing Segregation of Duties, which lead to Migrator Role and Executor Role.
- Successfully installed and configured WebLogic Server 14.1.1/12.2.1.4/ 12.13,10.3/9.2/8.1/6.1/5.1, Application Server components namely Tuxedo 12.2.2,12.13,10gR3/9.1/8.1/6.5/Jolt 1.2 and PeopleSoft 8 Processes.
- Expertise in configuring and setting up Application Server domains, Process Scheduler domains, WebLogic, Web Sphere Tuxedo, Jolt, installing PIA.
- Comprehensive experience in setting up security in HRMS, Financials, EPM and Portal environments.
- Evaluating the required patches and applying them to the PeopleSoft system on a timely basis.
- Extensive experience in PeopleTools (Application Designer, Data Mover, Configuration Manager, PeopleSoft Security, PS Query, PeopleCode and Application Engine).
- Change Management, Change Control, Release Management and Configuration Management methodologies.
- Extensive experience in applying PeopleSoft Updates, Patches & Fixes, Tax Updates, Maintenance Packs and Service Packs.
- In-depth working knowledge of Tuning of Application Server, Process Scheduler, Web Server, Turn on Traces, Applying PS updates, patches & fixes for several environments, Building SQL objects, cleaning up DDDAUDIT, SYSAUDIT, SQL Alter Audit Reports, Perform Database Refresh, Modify PS Security.
- Experienced setting up Single Sign-on, Integration Broker, LDAP Security and SSL authentication.
- Experience in PeopleSoft Security design, PeopleSoft user provisioning, knowledge of segregation of duties concepts, sensitive access and experience in user access security including configuration of PeopleSoft like (Creation and implementation of Roles, permission lists, User Profiles, Department Trees and Query Security. Also, creation of Portal Structure, content and PeopleSoft menus for new components etc.).
- Hands on experience in setting up PeopleSoft performance monitor (PPM).
- Experience in PeopleSoft Security module implementation and support (FSCM, HRMS).
- Experience in cleaning SYSAUDIT report related to security.
- Experience in scheduling the PeopleSoft processes and SJT security processes.
- Hands on experience in row level security.
- Hands on experience in PUM, SES, OEM
- Worked and helped Developers, Testers, Functional Analysts, End users, DBAs, OS Administrators, Project Managers, and other technical team members to support and ensure PeopleSoft system availability and optimum performance. Experience in migrating security in PeopleSoft using projects and data mover scripts and other automated utilities.

Skills

Languages	People Code, PL/SQL, C, C++, Java
Databases/ File Access	Oracle 8i/9i/10g/11g/12c, MS Access, SQL Server 2000/2005/2008/2012/2014, DB2 ver7.0.
Operating Systems	Windows 2000,2003,2008,2012, XP & NT, AIX, Linux, Unix, Sun Solaris, OS/390, MVS
Reporting Tools	SQR6.4, Crystal Reports 7.0/8.0/9.0, PS/nVision, OBIEE and PS Query.
Web/Developing Tools	HTML, XML, VBScript, Java2, JVM, Java Servlets, TOAD
ERP	PeopleSoft HRMS/HCM (App-9.2/9.1/9.0/8.8/8.3/8.1x People Tools – (8.59,8.58,8.57,8.56,8.55/8.54/8.53/8.52/8.51/8.50/8.4x,8.1x) PeopleSoft FSCM (App-9.2/9.1/9.0/8.9/8.8/8.4PTools 8.49/8.468.42/8.1x); PeopleSoft EPM, HR/FIN Budgeting (App-9.0/8.9/8.8/8.3, PeopleTools 8.49/8.4x); PeopleSoft Portal (Application 9.1/9/0/8.9/8.8/8.4, PeopleTools 8.50/8.4x); PeopleSoft Campus Solutions (9.2,9.0), PeopleSoft CRM 9.1/9.0/8.9/8.8, UPK 6.1; PeopleSoft Enterprise Learning Management (ELM) 9.2,9.1,9.0
PeopleTools	Application Designer, Data Mover, Configuration Manager, Application Engine, Query Manager, PTF (PeopleSoft Test Framework), PeopleSoft Security Administration, XML Publisher, BI Publisher, CA7
Upgrade Tools	Change Assistant, Upgrade Assistant, PUM (PeopleSoft Update Manager)
Application Servers	Tuxedo 12.1.1.0/11gR1,10gR3/9.1/8.1/6.5/, Jolt 1.2
Web Servers	Web Logic Server 12.1.2/10.3.6/9.2/8.1/6.1/5.1, Web Sphere 5.1/6.1
Testing Tools	Quality Center, Clear Quest and Clear case.
Others	PHIRE 6.1/6.2/7.1.1/10.2, AutoSys, Kronos 5.1/6.2, Micro focus Server Express 5.1 COBOL, VCA (Virtual Computing Appliance), SES 11.2.2.2/11.1.2.2, Elastic Search, Vertex, STAT, UPK, RMAN, Data Pump, Database sizing, TOA (Transmission Outage Application)

Professional Experience

Community Health System, IN **Nov 2020 – current**

Sr. PeopleSoft System Administrator / Sr. PeopleSoft Upgrade Administrator

- Worked on PeopleTools upgrade from 8.58.13 to 8.59.09 on HCM, FSCM and PHIRE.
- Worked on PeopleTools upgrades from 8.56.18 to 8.58.13 i.e., upgraded PeopleTools on HCM, FSCM and PHIRE.
- Created change package from HCM/FSCM PUM Images with all updates not applied and applied to DEMO, DEV, TST and PRD environments.
- Applied PRP's to PUM Images for HCM and FSCM and extracted the Change packages.
- Ran SYSAUDIT and DDDAUDIT reports and cleared the inconsistencies/discrepancies.
- Applied Tax updates, patches after creating change package from PUM Images.
- Worked on post refresh activity once the database is refreshed.
- Extensively worked on PeopleSoft Update Manager, Change Assistant and ELK.
- Fixed Elastic Search issues reported, deployed search indexes and built search indexes.
- Kibana Analytics configuration.
- Worked on performance tuning of PeopleSoft server components.
- Implemented Appsian ASP, Appsian 360 in HCM and FSCM instances.
- Coordinating with Development, Testing, and Network and DBA team to resolve issues
- Providing 24x7 on call support for PeopleSoft HCM, PeopleSoft FSCM and third-party applications

Illinois State University **Dec 2019 – Till date**
Sr. PeopleSoft System Administrator / Sr. PeopleSoft Security Administrator / Sr. PeopleSoft Upgrade Administrator

- Worked on installing CS PUM Images 15-21 HCM PUM Images 32-40.
- Created change package with all updates not applied and applied to DEMO, DEV, TST and PRD environments.
- Applied PRP's to PUM Images for CS, HCM and extracted the Change packages.
- Ran SYSAUDIT and DDDAUDIT reports and cleared the inconsistencies/discrepancies.
- Applied Tax updates, patches after creating change package from PUM Images.
- Migrating PeopleSoft objects on the migration path.
- Extensively worked on PeopleSoft Update Manager, Change Assistant.
- Fixed Elastic Search issues reported, deployed search indexes and built search indexes.
- Worked closely with the developers and Functional Specialists in configuring the PeopleSoft Security.
- Worked on performance tuning of PeopleSoft server components.
- Applied the CPU's as per the recommendation by Oracle.
- Responsible for establishing and maintaining high quality support, high availability, responsiveness to applications user needs and implement best practices
- Coordinating with Development, Testing, and Network and DBA team to resolve the issues in a timely manner.
- Providing 24x7 on call support for PeopleSoft HCM, PeopleSoft Campus Solutions and third-party applications

Palomar Community College **Feb 2019 – Dec 2019**
Sr. PeopleSoft System Administrator / Sr. PeopleSoft Security Administrator / Sr. PeopleSoft Upgrade Administrator

- Currently working on FSCM PT Upgrade from PT 8.53.27 to 8.56.14
- Working on Campus Solutions upgrade from 9.0 to 9.2 and PT Upgrade from PT 8.54 to 8.56.14
- Hands on experience in PUM
- Worked on PUM Images till 31 for FSCM, 30 for HCM, 12 & 13 for CS.
- Created Change packages from PUM Image and applied to the migration path.
- Applied PRP's to PUM Images.
- Installed and configured PI Source Images demo, applied RFU
- Ran SYSAUDIT and DDDAUDIT reports and cleared the inconsistencies/discrepancies.
- Applied Tax updates, patches after creating change package from PUM Images.
- Migrating PeopleSoft objects on the migration path.
- Worked closely with the developers and Functional Specialists in configuring the PeopleSoft Security.
- Responsible for establishing and maintaining high quality support, high availability, responsiveness to applications user needs and implement best practices
- Coordinating with Development, Testing, and Network and DBA team to resolve the issues in a timely manner.
- Providing 24x7 on call support for PeopleSoft HCM and third-party applications

McLaren Health, Flint, MI **Apr 2018 – Feb 2019**
Sr. PeopleSoft System Administrator / Sr. PeopleSoft Security Administrator / Sr. PeopleSoft Upgrade Administrator

- Working on FSCM 9.2 and HCM 9.2 and People Tools 8.55.25/ 8.56.06
- Upgraded People Tools to 8.56.06 from 8.55.21 for HCM.
- Installed and configured HCM PUM Image 26,27, FSCM PUM Images 27, 28 for bug fixes

- Created new change package with all updates not applied from PUM Image and applied it in Demo, Dev, Test, QA and training instances. Also applied PRP's to the images.
- Applied Tax updates in all HR instances.
- Implemented Elastic Search and resolved issues related to Search indexes.
- Implemented security for FIN/SCM and HCM applications.
- Extensively worked on PeopleSoft Update Manager, change assistant to apply selective patches/bug fixes.
- Responsible for Design, creation and implementation of Roles, Permission List and User Profiles for PeopleSoft FIN / SCM /HRMS systems.
- Responsible for PeopleSoft Online security, PeopleSoft security definitions, PeopleSoft authorization Ids, PeopleSoft Sign on, Implementation options and work with security Interface for Financials.
- Involved in Design and implement query security, Tree security, process groups, Tools security and defining it in permission lists.
- Configured LDAP authentication and authorization (LDAP ProfileSync).
- Implemented Dynamic Role rules for HCM and FSCM.
- Worked extensively with Data Mover utility for running DMS scripts for exporting, importing PeopleSoft security and encrypting passwords. Also migrated security on the migration path.
- Enforced PeopleSoft workflow Maintenance for Requisitions and approver delegations after assigning necessary roles to the business community.
- Worked closely with the PeopleSoft DBA(s), developers and Functional Specialists in configuring the PeopleSoft Security
- Cleaned SYSAUDIT reports.
- Resolved issues with Integration broker messaging.
- Providing 24x7 on call support for PeopleSoft Server components
- **Environment:** FSCM 9.2/HCM 9.2, People Tools 8.55.25, Web Logic 12.1.2, Tuxedo12.1.1.0/11gR1/10gR3, Oracle 12c, Linux 5.5/Linux 6.3, Windows 2012 server, COBOL Server Express 5.1, OEM.

Beaumont Health, Troy, MI **May 2016 – Mar 2018**
Sr. PeopleSoft System Administrator / Sr. PeopleSoft Security Administrator/ Sr. PeopleSoft Upgrade Administrator

- Worked on FSCM 9.2 and HCM 9.2 and People Tools 8.54.12
- Installed and configured HCM PUM Image 17, 18, 19, 20, 21,22, 23 & 24, FSCM PUM Images for bug fixes
- Worked extensively on DPK's (Deployment Kit)
- Created new change package with all updates not applied from PI 17- 24 and applied it in Demo, Dev, Test, QA and training instances. Also applied PRP's to the images.
- Applied Tax updates in all HR instances.
- Upgraded FSCM 9.2 People Tools from 8.55 – 8.56 on Test system to know about the new features
- Reviewed & compared the existing item master database to suppress the inactive items from being displayed on search page
- Involved in utilization analysis such as spend by item, vendor or category
- Performs database cleansing to eliminate duplicate items in item master.
- Manages the inactivation of obsolete/discontinued items.
- Integrated HCM 9.2 with FSCM 9.2 environments using Integration Broker.
- Design, creation and implementation of Roles, Permission List and User Profiles for PeopleSoft FIN / SCM /HRMS systems.
- PeopleSoft Online security, PeopleSoft security definitions, PeopleSoft authorization Ids, PeopleSoft Sign on, Implementation options and work with security Interface for Financials.

- Involved in Design and implement query security, Tree security, process groups, Tools security and defining it in permission lists.
- Worked extensively with Data Mover utility for running DMS scripts for exporting, importing PeopleSoft security and encrypting passwords. Also migrated security on the migration path.
- Implemented and fixed the issues with Dynamic role rules.
- Created roles/permission lists required for HR, Payroll, ESS, MSS and T&L modules
- Administering and creation of portal structure, content, PeopleSoft menus for new components.
- Enforced PeopleSoft workflow Maintenance for Requisitions and approver delegations after assigning necessary roles to the business community.
- Enforcing Security guidelines and policies adherence to satisfy Sarbanes Oxley requirements for IT Auditing.
- Cleaned SYSAUDIT report related to Security and DDDAUDIT in all the instances.
- Installed and configured PHIRE 10.2 and created workflow for the change management based on the migration path.
- Worked on the refresh of environments.
- Installed and integrated Elastic Search for HCM on 8.55.13
- Worked closely with developers and Functional Specialists in configuring the PeopleSoft Security.
- Configuration, maintenance, and performance tuning of application messages and servers.
- Configured Fluid User Interface setup and fluid mobile approvals, PeopleSoft navigation bar.
- Coordinating with Development, Testing, and Network and DBA team to resolve issues
- Providing 24x7 on call support for PeopleSoft Server components
- **Environment:** HCM 9.2, People Tools 8.56.3,8.55.13/8.54.12, Web Logic 12.1.2, ExaLogic, Exadata, Tuxedo12.1.1.0/11gR1/10gR3, Oracle 11g, Linux 5.5/Linux 6.3, Windows 2003/2008/2012 server, COBOL Server Express 5.1, OEM.

California Water Service Group, San Jose, CA **Jan 2016 - Apr 2016**
Sr. PeopleSoft System/Upgrade Administrator

- Worked on FSCM 9.0 to 9.2 and People Tools 8.49.20 to 8.54.16
- Installed PeopleSoft FSCM update image 16 of 9.2 and People Tools 8.55.16.
- Worked on PeopleSoft deployment packages (DPK) for PI Images
- Configured PeopleSoft Update Manager (PUM) and Change Assistant.
- Installed and configured Secure Enterprise Search (SES) 11.2.2.2 and 11.1.2.2
- Installed and configured CRM 9.2 configured Integration broker between HCM and CRM.
- Configured Application Server, Process Scheduler, Web Server and PeopleSoft Internet Architecture.
- Installed and setup Change Assistant to apply application updates to the PeopleSoft applications on People Tools 8.54.16
- Fixed Performance issues of the FSCM applications.
- Worked on unified navigation in PeopleSoft interaction hub 9.2.
- Ran SYSAUDIT and DDDAUDIT reports and cleared the inconsistencies/discrepancies.
- Configured Integration broker and Report Nodes and resolved IB issues.
- Configured Fluid User Interface setup as fluid page definitions are maintained within App Designer to add Fluid homepages, tiles, Notification Framework, and PeopleSoft navigation bar.
- Worked on Push notification framework to broadcast a message to all users via the system and provided documentation with the steps.
- Worked with the developers and Functional Specialists in configuring the PeopleSoft Security.
- Configuration, maintenance, and performance tuning of application messages and servers.
- Worked on OBIEE setup and configuration.

- Worked extensively with Data Mover utility for running DMS scripts for exporting, importing PeopleSoft security and encrypting passwords.
- Coordinating with Development, Testing, and Network and DBA team to resolve issues
- Installed and configured PeopleSoft Performance monitor.
- Providing 24x7 on call support for PeopleSoft Server components
- **Environment:** FSCM 9.2/9.0, People Tools 8.54/8.49.20, Web Logic 12.1.2/10.3.6, OBIEE, Tuxedo12.1.1.0/11gR1/10gR3, Oracle 11g, Linux 5.5/Linux 6.3, Windows 2003/2008/2012 server, COBOL Server Express 5.1, MSS 2014 and MSS 2008, OEM.

ITC Holding Inc, Novi, MI **Sep 2012 – Dec 2015**
Sr. PeopleSoft System/Upgrade Administrator / Sr. PeopleSoft Security Administrator

- Upgraded PeopleSoft HRMS 9.1 to 9.2 and People Tools 8.52 to 8.54.13
- Configured PeopleSoft Update Manager (PUM) and Change Assistant.
- Installed and configured Secure Enterprise Search (SES) 11.2.2.2 and 11.1.2.2
- Installed and configured PeopleSoft Test Framework (PTF)
- Deployed PeopleSoft Servlets (PIA) on WebLogic, created and loaded DEMO and SYS databases
- Upgraded PeopleSoft FSCM 9.0 to 9.2 and People Tools 8.49.15 to 8.54.13
- Installed PeopleSoft FSCM update image of 9.2 and People Tools 8.54.13.
- Installed Vertex, PGC on Linux 6.1 and integrated with FSCM 9.2
- Configured Application Server, Process Scheduler, Web Server and PIA
- Installed and setup Change Assistant to apply application updates to the PeopleSoft applications on People Tools 8.54.13
- Configured FTP Attachments setup.
- Worked on PeopleSoft performance monitor (PPM)to monitor real time system performance
- Played a key role at the time of go-live and resolved post go-live issues
- Production Support of FIN/SCM and HRMS (9.1, PT8.52) environments.
- Installed and configured TOA (Transmission Outage Application) , applied bug fixes and production support of all the Dev, Test and Prod instances.
- Implemented authentication domain, load balancing, applied SSL.
- Configured Integration broker and Report Nodes and resolved IB issues.
- Performed the installation of application patches, tax updates and maintenance releases on development, test, QA and production environments delivered by Oracle
- Worked on Kyriba Integration with PeopleSoft FIN/SCM.
- Implemented Security for Kyriba Integration project.
- Worked on few other interface designs and file transfers using FTP/SFTP.
- The design, creation and implementation of Roles, Permission List, User Profiles, Department trees and Query Security and Content and PeopleSoft Menus for new components
- Worked on performance tuning on HRMS and FSCM applications.
- Worked on new Fluid User Interface as fluid page definitions are maintained within App Designer to add Fluid homepages, tiles, Notification Framework, PeopleSoft navigation bar.
- Worked on Push notification framework to broadcast a message to all users via the system.
- Attended Oracle training on VCA (Virtual Computing Appliance) and implementation.
- Configuration, maintenance, and performance tuning of application messages/message servers
- Worked on OEM to configure PeopleSoft Plugin to start/stop domains.
- Point of contact for Migration / Creation of Projects containing PeopleSoft objects, Security customizations from Development, Test, Quality Assurance and Production environment.
- Enforced PeopleSoft workflow Maintenance for Requisitions and approver delegations after assigning necessary roles to the business community.

- Responsible for Creating / maintaining / enhancing the Quarterly periodic review reports and SQL queries.
- Responsible for Create / schedule / Monitor Batch processes for PeopleSoft Financials/HRMS.
- Configured OBIEE to generate reports and also performance tuning.
- Responsible for enforcing Security guidelines and policies to adhere to satisfy Sarbanes Oxley Requirements for IT Auditing.
- Provided 24x7 on call support to support development and production
- Assisted management in developing and managing the long and short-term visions and objectives.
- Worked extensively with Data Mover utility for running DMS scripts for exporting, importing PeopleSoft security and encrypting passwords.
- Coordinating with Development, Testing, and Network and DBA team to resolve the issues in a timely manner.
- **Environment:** HRMS 9.2/9.1, FIN/SCM 9.2/9.0, Portal, People Tools 8.54/8.53/8.49.15/8.52.06, Web Logic 12.1.2/10.3.6, Tuxedo12.1.1.0/11gR1/10gR3, Oracle 11g, Linux 5.5/Linux 6.3, Windows 2003/2008/2012 server, COBOL Server Express 5.1, UPK 11.1.0.2, CA7, OEM, OBIEE.

TD Ameritrade, Omaha, NE **Apr 2012 – Sep 2012**
Sr. PeopleSoft System/Upgrade Administrator / Sr. PeopleSoft Security Administrator

- Upgraded PeopleSoft HRMS 9.0 to 9.1 and People Tools 8.49 to 8.52.
- Played a key role at the time of go-live and resolved the issues.
- Deploy, configure, and maintain PeopleSoft Servers.
- Modify PeopleSoft app server and web server configurations as appropriate
- Use PeopleSoft and 3rd party development tools and languages as necessary to efficiently support and troubleshoot systems
- Completed post refresh tasks for PS environments.
- Installed OSES (Oracle Secure Enterprise Search) and configured People Tools.
- Worked on Disaster recovery (DR). Created an application on separate servers for DR testing.
- Implemented authentication domain, load balancing, applied SSL.
- Created a new TAM environment to start the implementation.
- Configured Integration broker and Report Nodes.
- Integrated Microsoft Outlook with PeopleSoft to maintain the interviews.
- Performed the installation of application patches, tax updates and maintenance releases on development, test, QA and production environments delivered by Oracle
- Maintaining Application servers, Process Schedulers and Web servers.
- Downloaded CRM 9.2 software, installed and configured the environments as part of new implementation.
- Implemented and troubleshooted the issue with Dynamic role rules.
- The design, creation and implementation of Roles, Permission List, User Profiles, Department trees and Query Security and Content and PeopleSoft Menus for new components
- Provide expertise in problem definition, capacity planning and the general design and integration of systems. Develops increasing expertise in key technologies, focusing on three-tiered, web-based solutions
- Configuration, maintenance, and performance tuning of application messages and message servers
- Worked on PeopleSoft Security for HRMS
- Resolved tickets related to PeopleSoft security / workflow issues.
- Create PeopleSoft users, configure PeopleSoft security roles, permission list etc.
- Interact with relevant contacts - Oracle Support, client business team, internal consultants, etc.

- Performed migration duties in the Development to Test and Test to Production environments in the PeopleSoft, as required by SOX.
- Locked user accounts gave accounts display only access using PIA.
- Designed security as per the requirement, exported and imported security before and after refresh.
- Worked closely with SOX auditors.
- Worked on PeopleSoft Application security
- Exported and imported PeopleSoft security using Data mover scripts.
- Maintained the PeopleSoft Application Security. Worked with other PeopleSoft administrators for cleaning up the inconsistencies' that came up in SYSAUDIT, mainly security relates inconsistencies like orphan permission lists etc.
- **Environment:** HRMS 9.1, People Tools 8.52.03, Web Logic 10.3.6, Tuxedo10gR3, Oracle 11g, Sun OS 5.1, Windows 2008 server, COBOL Server Express, CRM 9.2

West Corporation, Omaha, NE **Aug 2011 – Apr 2012**
Sr. PeopleSoft System Administrator / Sr. PeopleSoft Security Administrator

- Performed the installation of application patches, tax updates and maintenance releases on development, test, QA and production environments delivered by Oracle.
- Installed Global Payroll to the existing PeopleSoft application. Applied all the Global payroll packages in non-production and Production systems.
- Implemented Security for Global Payroll and migrated security objects from Dev to QA, QA to UAT and Prod.
- Maintaining Application servers, Process Schedulers and Web servers.
- Involved in setting up PPM to identify poor performance of the domains, hosts.
- Implemented and troubleshooted the issue with Dynamic role rules.
- The design, creation and implementation of Roles, Permission List, User Profiles, Department trees and Query Security and Content and PeopleSoft Menus for new components
- Supported the customers globally (USA, UK, Philippines, Mexico, Canada etc.) and resolved their issues related to security. Scheduled the SJT processes.
- Installed and configured PeopleSoft CRM Demo database.
- Implemented security related to SIP (Salary Increase Plan) project in PeopleSoft
- Deploy, configure, and maintain PeopleSoft Servers
- Migration of code in all environments using PHIRE.
- Upgraded PHIRE 6.2 to 7.1.1
- Upgraded UPK 5.1 to 6.1
- Configuration, maintenance, and performance tuning of application messages and servers
- Coordinating with Development, Testing, and Network and DBA team to resolve
- Installed PeopleSoft FSCM 9.0 and People Tools 8.52
- **Environment:** HRMS 9.1, FSCM 9.0, CRM, People Tools 8.50/8.52, Web Logic 10.3.3, Tuxedo10gR3, Oracle 11g, AIX 6.1, Windows 2003/2008 server, COBOL Server Express, UPK

Gap Inc., Albuquerque, NM **Feb 2011 – Jul 201l**
(Infosys – Implementation Partner)
PeopleSoft System/Upgrade Administrator / PeopleSoft Security Administrator

- Installed a new Demo environment of HRMS 9.1, PeopleTools 8.51, Tuxedo 10gR3, WebLogic 10.3.3 and related third party products.
- Created a Demo and Sys and the other databases using Data Mover in bootstrap mode.
- Configured Application Server, Process Scheduler, WebLogic Server for the new 9.1/8.51 release.
- Downloaded the Upgrade Documentation, Upgrade Scripts and Templates, Required for Upgrade patches/bundles and Tax Updates. Downloaded the template for required for upgrade for HRMS 9.1 Upgrade New Functionality with HRMS 9.1

- Troubleshooting for isolating technical problems in the PeopleSoft Internet Architecture including Oracle databases, tuxedo application servers on IBM AIX, and process schedulers on both AIX and NT.
- Installed and Configured Change Assistant on the Upgrade Workstation and mapped corresponding Source and Target $PS_HOME file systems and databases.
- Did multiple initial Pass and Move to Production (MTP) for the upgrade Process
- Ran Change Assistant for Tools and Application upgrade, Ran compare reports and take over the customization functionality for upgrade
- Resolved upgrade issues of Business Process and applications
- Running the SYSAUDIT and DDDAUDIT reports to clean any inconsistencies and orphan objects
- Upgrade of the HRMS Tools 8.47 to 8.51 and Application 8.8 to 9.1
- Installed People Books for HRMS 9.1.
- Installed PIA, configured PIA for all the instances of DEMO, DEV, QA, UAT and PROD databases
- Configured Integration Broker, defining Gateway, creating and configuring nodes for HR and SSO
- Installed Verity for Site Search
- Extensively worked with the technical team members, developers, technical and functional managers, permanent DBAs, UNIX Admin's, Network Engineers to resolve several issues.
- Migrating PeopleSoft objects to the migration path.
- Tuned SQL, PeopleCode Tracing on Application Server and the SQL, PeopleCode and AE Tracing on the Process Scheduler to help users troubleshoot issues related to their SQL, PeopleCode and Application Engine Programs
- Participated in BCP DR for 2011.Installed France ADP extracts.
- Providing PeopleSoft access to the Global business partners (US,UK, France, Japan, China)
- Working on PeopleSoft Security Administration of Permission lists/roles/users and PeopleSoft HCM data security, including row level security (and associated SJT processes), global security, and the underlying incorporation of security tree management to provision access to the end users.
- Provide quality formal and informal documentation consistent with organization standards
- Worked with Subject Matter Experts when building the new Security design for China and Japan to create new permission lists and Roles.
- **Environment:** HRMS/HCM 8.8, ELM 8.8, HCM 9.1, People Tools 8.45/8.51, Web Sphere5.1, Weblogic 10.3, Tuxedo10gR3, Tuxedo 8.1, Oracle /9.211g, AIX 6.1, Windows 2003/2008 server, COBOL Server Express 4.0/5.1 SP2

Horizon Blue Cross Blue Shield of NJ, NJ **Sep 2010 – Jan 2011**
(CSC – Implementation Partner)
PeopleSoft Server Administrator / PeopleSoft Security Administrator

- Perform PeopleSoft Server Administration (Maintain Webs Servers, Application Servers, and Process Schedulers for the PeopleSoft environment for the In-Scope Applications.)
- Provide 24x7 supports for PeopleSoft Server Administration
- Perform monthly security audits (e.g. Application Designer Access, Generic ID's)
- Installed and setup Change Assistant to apply application updates to the PeopleSoft applications on PeopleTools 8.48, 8.49 and above
- Applying Tax updates for Payroll.
- Resolving end user request with the PeopleSoft server components.
- Monitoring Web server logs, Monitoring Disk space and Clearing log files.
- Applied dot patches to People tools, clone or copy instances, and backup instances.
- Annual performance tests and subsequent tuning monitor PS Process Scheduler, WebServer, Application Server, and Install, configure and maintain change assistant.
- Fixed the issues with the ELM course launching.

- Implemented security for ELM and FSCM modules and documented the security design.
- Created permission lists and roles for the PeopleSoft Financials Supply Chain Modules
- Migrated all the security objects from nonproduction environments to production environments.
- **Environment:** HRMS/HCM 8.9, ELM 8.81, FSCM 9.0, PeopleTools 8.47/8.48/8.49, WebLogic 9.2/8.1, Tuxedo 9.1/8.1, Oracle 10g, AIX 5.3, Windows 2003 server, COBOL Server Express 4.0 SP2, Site Scope.

University Of Central Florida (UCF), Orlando, FL **Mar 2010 – Aug 2010**
(Oracle Corporation – Implementation Partner)
PeopleSoft Administrator

- Responsible in Installation of PeopleSoft CS 9.0 on People Tools 8.50 Extensively performed the duties of a PS Admin for the Upgrade project
- Worked on Campus Solutions security Design, configuration and implementation.
- Integrated with CS with Portal
- Installed a new Demo environment of Campus solutions 9.0 on PeopleTools 8.50, Tuxedo 9.1, WebLogic 10.3.1 and related third party products.
- Created a Demo and Sys and the other databases using Data Mover in bootstrap mode.
- Configured the Application Server, Process Scheduler, WebLogic Server PIA for the new 9.0/8.50 release.
- Installed and configured Oracle Application Testing Suite (OATS) to test the load of Web Servers.
- Configured the ServerStats.
- Added the monitored systems for checking the CPU, Memory utilization on the server
- Implemented PeopleSoft Performance monitoring to troubleshoot the issue of domains, app-tier.

Education & Training

- Master of Technology (M. Tech - Computer Science and Engineering) from Bharath Institute of Higher Education & Research, Deemed University, Chennai, India
- Master of Science (M. Sc - Computers) from Kakatiya University, India
- PeopleSoft Server Administration 8.5x/8.4x
- PeopleTools 1 & 2
- PeopleSoft Integration tools. PeopleSoft Security Administration 8.5x/8.4x.

8.5 SRIKANTH V. – DATABASE ADMINISTRATOR

Summary

Srikanth has over 10 years of experience as an Oracle DBA, including installation, configuration, performance tuning, backup/recovery, disaster recovery, upgradation, cloning, patching, administration, and 24x7 on-call production support on different HP-UX, Sun Solaris, Linux, AIX, and Windows.

- Extensive experience in custom development/data quality analysis, legacy data processing, stored procedures, triggers and indexing strategies.
- Extensive experience in Oracle architecture, I/O tuning, memory tuning, performance tuning, backups, recoveries, RMAN backups, optimization, crash/disaster recovery, networking, troubleshooting.

Skills

- **Databases:** Oracle 8i to current, MS SQL Server 2014
- **Operating Systems:** Solaris 8/9/10, RHEL, HP-UX, Aix, Linux, Windows
- **High Availability & Tuning/Monitoring:** Real Application Cluster (RAC) 11g R2 and R1 with ASM, Real Application Cluster (RAC) 10g Release 2 with ASM, Oracle Management Server (OMS) 9i, 10g &11g, Oracle Enterprise Manager (OEM) 9i, 10g & 11g, LOG MINER, Physical Standby, Data-Guard 10g & 11g, Database Cloning (Manual , RMAN), Standby Databases (Manual, RMAN) (Physical & Logical), RMAN 9i, 10g & 11g, AWR, ADDM, ASSM & Statspack Reports & other Logs, Tuning with SQLT, ADDM, Active Database Cloning with duplicate, Collecting information with ADRCI, TKPROF, EXPLAIN PLAN

Professional Experience

ERPA Project: Capital City in Mid Atlantic **Nov 2018 – Present**
Application Administrator/ DBA

- Perform Non-Prod database refreshes.
- DB2 SQL performance tuning
- Monitoring database health performance
- Performance Tuning of Web/App Server and Database Server including various configuration related parameters.
- Extensively worked with Development Team to resolve issues related to Conversion Programs.
- Performed Project Migration using PHIRE application.
- Created and configured Application Server Domain templates and modify the App Server parameters that affect the system performance for Dev, QA, and Prod environments.
- Configured and used Change Assistant to apply Tax Updates, patches, and maintenance packs.
- Extensively worked on Performance Tuning of Web Servers, Application Servers, Process Schedulers and Databases in coordination with the respective teams.
- **Environment:** zOS/390, Windows, PeopleSoft FSCM, HRMS, Portal and People Tools 8.55/8.53/8.51.

ERPA Project: Public University, Alabama **Nov 2015 – Present**
Sr. Oracle DBA

- 24/7 production Support for mission critical production systems.
- Involved in upgradation of Oracle11g to 12c. Installation and configuration of Oracle databases
- Active duplicate cloning of the databases using RMAN.
- Cloning from cold backup using RMAN.
- Used EXPLAIN PLAN, TKPROF to tune SQL queries.
- Used normal import and export and datapump import and export for exporting and importing schemas, tables etc. from one database to another.

- Responsible for moving data from Production to lower environments for various testing cycles using Oracle data pump and refresh UAT and Test environments with Prod data.
- Generated AWR and ADDM reports for Performance and Tuning.
- Renaming databases with NID.
- Security Administration including management of profiles, roles, users/their privileges.
- Experience in designed and deployment of UNIX Shell Scripts using K Shell.
- Flash back technology.
- Resolve issues during migration from different ASM disk groups following up with Oracle.
- Manage Cluster Services in case of any abnormal failures. Worked with users in tuning bad SQL.
- Tuned and optimized SQL Query, SGA and Disk I/O using Oracle Enterprise Manager and by monitoring the Stats pack report generated from snapshots taken at the peak business hours.
- Worked on Database optimization by setting various initialization parameters on Oracle request.
- Restorations of databases using RMAN. Experience in various recovery scenarios.
- Upgrading the databases to higher versions of oracle by manual and DBUA.
- Generating AWR reports on regular basis to identify database performance at peak load.
- Tuning the SQL statement by analyzing the explain plan and ADDM reports
- Implemented stored scripts in catalog for effective use of RMAN.
- Solution design team and identifying solutions to the new business functionalities.
- Tuning memory parameters
- Performed logical backups, Hot/Cold Backup, Recovery and Cloning of databases via RMAN Backup.
- Managing Oracle 11g and 12c environments using the OEM Grid Control tools.
- Responsible for Logical and Physical data modeling.
- Extensive performance tuning experience, specializing in Operating system tuning, SQL tuning, Database/Instance tuning.
- **Environment:** Oracle 12c/11g, Sun Solaris, Linux, TKPROF, AWR, Red Hat Linux 6/7, Data Guard, Windows, ERWIN.

ERPA Project: Large HBCU, Sr. Oracle DBA **Apr 2014 – Dec 2018**

- Installed and configured 11g single instance.
- Active duplicate cloning of the databases using RMAN.
- Configured Recovery catalog for all databases in the environment.
- Created batch scripts for RMAN incremental, cumulative and full back-up on Linux and Windows.
- Performed and prepared Recovery steps.
- Install, patch and maintain oracle software.
- Creating users and assigning roles and privileges
- Tuned all oracle instance components including SQL/PLSQL.
- Control all migrations of oracle schema objects.
- Working with application teams to enhance the performance of database with the help of AWR; Explain plan and other performance reports.
- Experience in opening, managing, and resolving Oracle Service Requests.
- Configure and manage RMAN backup using GRID.
- Restoration of databases using RMAN. Experience in various recovery scenarios.
- Performed logical backups, Hot/Cold Backup and Recovery and Cloning of databases using RMAN Backups.
- Involved in server maintenance and quarterly patching applying activities.
- Handled other general database administration activities.
- Starting and stopping WebLogic; Tuning WebLogic

- Implemented and currently supporting on OEM 11g.
- Prepared and monitored documentation on applications and databases.
- Generated and analyzed AWR reports for performance tuning.
- **Environment:** Oracle 11.2.0.4, AWR, Windows 2012, GRC, UC, SWIF.

Telecommunications Services Provider, NE **Jan 2013 – Mar 2014**
Sr. Oracle DBA

- Installation and configuration of RAC instances in 11g
- Changed OCR and VOTING disks.
- Maintained clusters with utilities like CRSCTL, SRVCTL, OCRCONFIG, OCRDUMP
- Generated reports from OEM 11G.
- Wrote documentation for Clusterware installation, RAC RDBMS installation, RAC Database creation, Grid Control installation, Oracle 11g Standby Documentation Active Duplicate cloning of the databases using RMAN.
- Extensive performance tuning experience, specializing in Operating System Tuning, SQL Tuning, Database/Instance Tuning.
- Implemented best practices for migration E-Business suite and regular databases to Oracle Exadata.
- Delivered Oracle Database performance-tuning services for customers with EXPLAIN PLAN, TKPROF, STATSPACK, SQLTRACE, ORADEBUG, 10gOEM Grid Monitoring custom scripts troubleshooting oracle databases using SQLTRACE utilities.
- Highly experienced in using STATSPACK, AWR to check health of database and hardware.
- Experience in planning and implementing the maintenance activities to reduce fragmentation and improve performance.
- Documented various recovery scenarios for DR site.
- Managed the gaps in archive logs to bring the standby in sync with primary database.
- Built DR environment for the business-critical databases.
- Performed refreshes from non-RAC database to a RAC environment.
- Tuned the SQL statement by analyzing the explain plan and ADDM reports.
- Deep knowledge in using tools such as TKPROF; EXPLAIN PLAN, ORADEBUG and TRACE FILE to tune SQL Queries.
- Monitored DB log files, data block corruption, segment fragmentation, performance issues, security threats, contention issues (deadlocks, I/O, memory, CPU, etc.)
- Installed ASM environment and migrating database from NON-ASM to ASM.
- Experienced with DATA GUARD implementation and Point in time Recovery.
- Monitoring/optimizing of system performance using index tuning, disk optimization, advanced database techniques, and other methods, including use of automated tools.
- Installed and configured CRS on all cluster nodes
- Configuration of ASM disk groups for installing 11gR2 2 node RAC databases.
- Migrated databases from file system to ASM.
- Converted single instance database to two instance RAC database.
- Installing Oracle 11g software for RAC with ASM
- Maintaining four (4) node RAC systems on Linux nodes; Configuration of ASM and two (2) instance RAC database.
- Involved in database schema optimization and data modeling.
- Resolving ASM issues (i.e., rebalancing, disk additions, managing ASM with ASM cmd)
- Managed all databases like Critical production, standby, report databases of different platforms

Major Clothing Retailer, Oracle DBA Jan 2010 – Dec 2012

- Played critical role in Data Center migration.
- Working with BCV backups for cloning and migrations
- 24x7 production Support for mission critical production systems
- Installation and configuration of Oracle databases (single instance) and installation and configuration of RAC instances in oracle 10g and 11g.
- Working with OEM 11g.
- Maintaining RAC databases on vendor clusters like sun cluster.
- Configuring RMAN backup for the databases with catalogue.
- Performed Import and Export using Oracle Data pump utilities EXPDP and IMPDP
- Troubleshooting the databases for various dynamic issues during run time
- Solving performance problems with the databases with respect to SQL tuning, DB parameters tuning, OS level and network level issues.
- Migration of the databases to different servers
- Optimized data loading using SQL*Loader
- Identified and tuned poor SQL statements using EXPLAIN PLAN, Hints, SQL TRACE, and TKPROF.
- Analyzed tables, indexes to use Cost Based Optimizer (CBO) for improving Query performance
- Knowledge in writing Shell Scripts for automating backups and restoration.
- Restorations of databases using RMAN
- Upgrading the databases to higher versions of oracle
- Experience in various recovery scenarios.
- Configuring DR databases and troubleshooting various issues related to DR recovery.
- Extensive use of Crontab in UNIX environment for scheduling routine tasks
- Performing switchover between Primary and standby databases.
- Administrated all database objects, tables, clusters, indexes, views, packages and procedures.
- Created and managed both system level and object level roles and privileges for various users. Killing sessions and revoking user privileges and roles.
- Deployment of applications and troubleshooting issues related to application servers.
- Generated stats pack reports on regular basis to identify DB performance at peak load.
- Tuning the SQL statement by analyzing the explain plan and ADDM reports.
- Implemented scripts to monitor the health of the databases and application servers.
- Checking CRON jobs. Monitoring Application specific background processes
- Planning and implementing the Archival policies as per the requirements.
- Working with the solution design team and identifying solutions to the new business functionalities.
- Preparing the weekly and monthly status reports to the management.
- Performed REDO logs management, tuning by creating new members/resizing them.
- Working with applications like tuxedo which are hardcoded with database tables.
- Working on distributed transactions for a group of databases with distributed architecture
- Building Dataguard environments
- Converting single instance databases to RAC databases.
- Allocating system storage/planning future storage requirements for database system.

Education

- Master of Information Technology, University of Ballarat (Australia) – 2009

8.6 JESSICA E. – PEOPLESOFT FUNCTIONAL CONSULTANT

Jessica has over 21 years of experience working in college and university environments with the PeopleSoft Campus Solutions ERP product. Has six implementations to her credit, extensive knowledge of all aspects of university Student Records, Academic Structure, Academic Advising, Campus Community, Admissions, and is especially gifted with ability to teach others and create documentation. Her excellent PeopleSoft experience, complex problem-solving skills, and proven ability to motivate and work effectively with a variety of people, makes her a strong consultant. She has also expanded her consulting abilities to include Student Financials.

University of Maine Systems
Functional Lead Academic Advisement

- Assess and document current state of Academic Advisement configuration and business processes across 7 institutions.
- Provide recommendations to improve user and student experience.

Illinois State University
Functional Student Records Consultant

- Document issues and recommend solutions on end of term processes.
- Assist the University with reconfiguration of repeat rule and corresponding configuration.

Cerritos College
Functional Student Records Consultant

- Document issues and recommend solutions on enrollment security.
- Support implementation of dynamic dating

University of Wisconsin - Madison
Academic Advisement Consultant

- Mentoring and assisting the Graduate Program implementation of Academic Advising for all 300+ programs in 9.2 through working sessions as needed.
- Providing alternative configuration for complex requirements.
- Providing best business practice standards for transfer credit.

Bellevue University
Functional Student Records Consultant

- Developed functional specifications for customization to create new class sections, reallocate enrollment, and assign instructors.
- Developed faculty database requirements.

San Joaquin Delta College
Functional Student Records Consultant

- Provided data standards for 3C configuration, assist with 3C communication development.
- Provided data standards for Academic Calendar configuration.
- Developed functional specifications for Faculty Bonus customization.
- Assisted with beginning and end of term processing for Student Records.
- Identified issues and recommended solutions.
- Developed JobSets as needed.
- Created simple equation engines.
- Modified transcript.
- Assisted with OnBase implementation.
- Trained on Query/Reporting.
- Trained SR analyst.
- Developed custom process that updates/creates program stacks.

Glendale Community College
Functional Student Records Consultant

- Configured repeat rule, assisted college with corresponding 3C and business process.
- Assisted with course catalog cleanup.

University of Wisconsin - Madison
Academic Advisement Consultant

- Mentored and assisted the Graduate Program implementation of Academic Advising for all 300+ programs in 9.2 through weekly working sessions.
- Assisted with the transition from 9.0 to 9.2.
- Provided alternative configuration for complex requirements.
- Provided training and best business practice standards as needed.
- Documented issues and recommend solutions.
- Developed ad-hoc queries as necessary.
- Provided necessary security needs design.

Florida State College Jacksonville
Student Records Consultant

- Provided Student Record 9.0 training/best business practice standards as needed
- Led configuration update of Clock hour career.
- Worked with college to create cleanup scripts on bad data within system.
- Assisted with conversion of data that did not get converted during implementation.
- Provided Security Roles & Permission best practice, create necessary security for Student Records.
- Implemented custom process to drop enrollments for non-attendance and non-payment.
- Implemented custom process to mass update program/plan stack for Discontinuations and Program/Plan changes.
- Implemented custom process for instructors to indicate drop for non-payment.
- Implemented custom student self-service change of program/plan.
- Implemented customizations to attendance roster for online classes and faculty access.
- Provided guidance on term/session configuration and dynamic dating
- Provided guidance on beginning of term processing for Student Records.
- Provided guidance on facility bolt-on.
- Assisted with 9.2 upgrade.
- Provided Curriculum & Requisite training.
- Developed automation of FA unit update for courses outside of program.
- Provided 3C training to Continuing Workforce Education office.
- Implemented OEE functionality for Continuing Workforce Education programs.
- Automated generation and partial posting of grade rosters.

College of Lake County
Academic Advisement Consultant

- Created Functional Design Documents for Batch assignment of Advisors, enhancements to Student Planner, and enhancements to Advising notes.
- Assisted in development of Advisement customizations.

Academic Advisement Consultant

- Performed Health check on AA module.
- Documented assessment of requested enhancements to Degree Audits and Advising module.

George Fox University
Trainer

- Created Basic & Advanced query training guides.
- Delivered Training, supported open lab workshops.

University of Wisconsin - Steven's Point
Student Records Consultant & Trainer

- Delivered Campus Query Training.
- Created 3C training guides and delivered training.
- Created Transfer Credit Rule configuration guide.
- Assessed Transfer Credit configuration.

City Colleges of Chicago
Functional Student Records & Academic Advisement Consultant

- Provided Student Record & Academic Advising 9.0 training/best business practice standards as needed to OIT staff.
- Provided data standards for 3C configuration.
- Provided data standards for Academic Calendar configuration.
- Assisted with Security Roles & Permission list clean-up.
- Configured Student Record & Academic Advisement 3C communications.
- Project Manager responsibility of "Smart Planner" customization (systematically populate student planner, manage student planner, load student shopping cart with proposed class sections and process student enrollment upon request).
- Developed functional specifications for customization to create a "Smart Planner".
- Oversaw the development, testing, training, and deployment of custom Smart Planner.
- Assisted with beginning and end of term processing for Student Records.
- Assisted with Student Records & Academic Advisement help desk tickets.
- Supported Smart Planner customization enhancements.

Miami Dade College
Continuing Education Bolt-on

- Assisted with functional configuration and provided functional support.
- Performed Fit/Gap analysis.
- Created 3C communications.

Peralta Community College District
Academic Advisement Lead

- Performed Fit/Gap analysis for Academic Advisement & Transfer Credit.
- Configuring Academic Advisement Module.
- Configuring transfer credit rules.
- Assisting with development of a custom student education planner.
- Aided with updates to security permission lists.

Student Records Consultant

- Prepared Institution specific training material.
- Trained select users on Curriculum Management, Academic Structure & Query.

Consultant

- Configured 3C functionality for Financial Aid project.
- Participated in Financial Aid fit/gap.
- Reviewed existing Academic Structure.
- Documented Financial Aid business processes via flowcharts.

University of Puget Sound
Functional Lead for Student Records, Campus Community, Academic Structure, Academic Advising & Admissions

- Performed Fit/Gap analysis for all Campus Solutions modules listed.
- Participated in Student Financials & Financial Aid fit/gap analysis.
- Created mapping documentation for data conversions.
- Configured required Academic Structure, Campus Community, Student Records, Academic Advising & Admission tables.
- Documented business processes via flowcharts.
- Created documentation of all configurations.
- Managed user legacy data scrubbing and preparation for conversion.
- Developed testing plans, scripts, and scenarios.
- Created reference documentations that over viewed system functionalities.
- Provided knowledge transfer to end users.
- Assisted users with UPK development.
- Provided leadership on integration points to other modules.
- Worked with technical team in functional requirements for LMS integration.
- Worked with technical team to develop an interface for Admission application data.
- Documented necessary permission lists and roles.

National Park Community College
Student Financials Consultant

- Recreated purged enrollment.
- Worked alongside users to correctly adjust and validate student accounts.
- Restructured fee and waiver configuration.
- Assisted with 1098T corrections.
- Student Records data correction of user errors.
- Created end user documentation.

Berkeley College
Functional Lead Student Records 9.0, Academic Structure 9.0, Academic Advising 9.0

- Conducted discovery sessions on all aspects of the Academic Structure, Student Records (Registrar), Student Financials as they relate to the Student Records and Academic Advising.
- Conducted Fit-gap analysis sessions for all areas.
- Business process redesign of the above areas/modules.
- Configuration of tables for Student Records modules.
- SME training development and delivery.
- Documentation of all configurations, Business Process Redesign for Student Records and Academic Advising.
- Reconfigured Academic Structure.
- Consolidated & Re-created student record history under new academic structure.
- Responsible for data analysis and data scrubbing.
- Updated/re structured the course catalog.
- Replaced vague fields of “standard” with more descriptive values.
- Eliminated need for customizations with use of new structure and delivered functionality.
- Assisted in TAP configuration and analysis.
- Reviewed and updated security roles and permission lists.
- Trained new staff on Academic Advising Module and Student Records Functionality.
- Created end user documentation.

Higher Education Client
Functional Consultant

- Assisted in development and promotion of the ACE bolt-on.

National Park Community College
Functional Lead Student Records 9.0, Academic Structure 9.0, Academic Advising 9.0

- Identified and recommended essential business process changes or additional functionality for the college including SEVIS functionality for international students.
- Worked alongside with the module leads to redesign business processes.
- Conducted business process analysis sessions for academic structure, student records, campus community, academic advising, and client reporting.
- Configured Academic Structure, Student Records, Academic Advising.
- Generated mapping documents for data conversion.
- Managed user legacy data scrubbing and verification.
- Supervised user acceptance testing.
- Developed test scripts for records and campus community with the project team.
- Provided knowledge transfer module leads.Trained end users.
- Designed necessary security permission lists and roles.

George Fox University
Functional Lead Campus Solutions 9.0

- Performed Fit/Gap analysis for student records, academic advising, and client reporting.
- Identified and recommended business process changes or additional functionality necessary for the college.
- Worked with module leads to redesign business processes.
- Configured Academic Structure, Student Records, Academic Advising.
- Created mapping documents for data conversion.
- Managed user legacy data scrubbing and verification.
- Supervised user acceptance testing.
- Assisted GFU project team in developing test scripts for records and campus community.
- Provided knowledge transfer to module leads.
- Assisted in security development.

Anderson University
Functional Lead Campus Solutions 9.0

- Performed business process analysis sessions for academic structure, student records, campus community, academic advising, instructor workload, and client reporting.
- Considered SEVIS functionality for international students as part of the discovery sessions.
- Worked with the college to identify and recommend business process changes or additional functionality.
- Worked with module leads to redesign business processes.
- Modified academic structure.
- Configured Student Records.
- Developed documents for mapping of data conversion.
- Managed user legacy data scrubbing and verification.
- Configured Academic Advising.
- Supervised user acceptance testing.
- Helped module leads develop test scripts for records and campus community.
- Provided knowledge transfer to student record module leads.

Synch-Solutions

Consultant

- Reviewed and documented PS 8.9 & 9.0 delta functionality for corporate upgrade and optimization resource guide and client worksheet.

City Colleges of Chicago
Consultant

- Developed academic advising prototype.
- Created academic advising configuration and set-up workbook documents.
- Drafted charter and project scope for academic advising module implementation.
- Participated in business process redesign project, created to-be process flows and made recommendations for future use of PeopleSoft enhanced functionality for district wide use.
- Led implementation of modified attendance tracking, created functional requirement, functional specification, system configuration and user job aid documents.
- Drafted functional requirements and functional specifications for NSLC reporting.
- Developed training material and delivered re-training to student record staff.

Heartland Community College
Consultant

- Analyzed and reviewed converted student record data to assess clean-up efforts required.
- Created detailed deliverable with focused analysis on the school's enrollment, program/plan stack and catalog/schedule.
- Made supplemental recommendations regarding more effective and efficient use of the PeopleSoft product.

Moraine Park Technical College
Systems Consultant

- Functional Lead for a PeopleSoft Student Administration 8.0 implementation.
- Responsible for implementing the Student Records module.
- Conducted business process analysis sessions for academic structure, student records, campus community, academic advising, instructor workload, and client reporting.
- Identified and recommended business process changes or additional functionality necessary for the college.
- Worked with module leads to redesign business processes.
- Modified academic structure.
- Configured Student Records.
- Created mapping documents for data conversion.
- Managed user legacy data scrubbing and verification.
- Oversaw user acceptance testing.
- Helped module leads develop test scripts for records and campus community.
- Provided knowledge transfer to student record module leads.

Benedictine University
Assistant Registrar

- Managed schedule of classes.
- Oversaw the publication of the traditional undergraduate course schedule booklet each term.
- Managed the scheduling of classroom assignments and classroom requests.
- Posted transfer, test, and other credit.
- Module Lead of Student Records for upgrade version 7.6 to version 8.0.
- Trained new Student Record employees on PeopleSoft 8.0.
- Created PeopleSoft 8.0 documentation for Student Records.
- Troubleshoot PeopleSoft 8.0 Student Records.

- Performed beginning of term processes such as calendar/session/term set-up and term roll.
- Assisted in design of online class offerings page (Ben U Live).
- Implemented pin number functionality.
- Created student record queries.
- Updated select crystal reports.
- Performed admissions applications.
- Centralized non-academic events into PeopleSoft event functionality.
- Managed course and class fees.
- Resolved university scheduling TBA workaround and implemented dynamic dating functionality.

Education & Training

- M.B.A. Benedictine University, Lisle, IL – August 2004. Management of innovation and technology, organizational leadership, management consulting, and entrepreneurship concentrations
- B.S. Butler University, Indianapolis, IN – August 2001. Computer science and actuarial science majors, business administration and mathematics minors
- SEVIS Training for School Officials

8.7 RITA F. – PEOPLESOFT FUNCTIONAL CONSULTANT

Over 35 years of experience in human resources, benefits, recruiting, systems development, and software consulting. Senior PeopleSoft HCM Functional Lead and Practice Director with numerous, full-lifecycle implementations and upgrades, including hands-on experience implementing PeopleSoft's Human Resources, Base Benefits, Benefits Administration, Manager Dashboard, eApps, Talent Acquisition Management and Candidate Gateway Modules. These implementations have included project management, requirements management, design, training, development and deployment phases, post-production support, and planning for future phases. PeopleSoft implementation experience spans version 1.0 through version 9.2. A PeopleSoft Enterprise 9 HCM, HR Consultant Certified Expert.

Professional Experience

Alabama State University
Functional Consultant

- Met with Human Resources and Payroll employees to review current processes and pain points.
- Showed Fluid functionality.
- Addressed and documented resolutions for pain points.
- Made recommendations for process changes that could be implemented immediately.
- Recommended process changes that could be completed over time.

AARP
Functional Consultant

- Served as a PeopleSoft Functional Consultant to assist with troubleshooting and configuration in a 9.2 environment.
- Documented custom pages, interfaces, reports, and enhancements in the 9.2 environment as preparation for Fluid Integration.
- Participated in daily and weekly meetings for Scrum, Weekly Ticket updates, Touchpoint, and other meetings as needed.
- Provided support to Benefits team during Open Enrollment. This included testing, configuration updates, and recommendations for functionality.
- Participated in meeting with the benefits team for issue resolution.
- Resolved ticket issues and Jira tickets.
- Tested custom email notifications to determine if emails had any
- Participated in meetings to determine if ERPA would implement PTF functionality at AARP
- Met with AARP to discuss the possible things to look out for when discontinuing the offering of Life Events through PeopleSoft.

Illinois State University
Functional Consultant

- Served as a Functional Consultant to support Human Resources and Benefits with troubleshooting and analysis for future state in a 9.2 environment.
- Presented overview of the Training module and guidance on configuration.
- Presented overview of the Remote Worker functionality available through Fluid Integration
- Provided guidance on the configuration tables that would need to be configured in PeopleSoft
- Researched and presented information on Multi-State Tax reporting including the PeopleSoft tables that would need to be reviewed and/or configured.
- Prepared documentation listing tables to be configured in Human Resources and Payroll.

Clackamas County, OR
Functional Lead

- Served as Functional PeopleSoft Consultant for 9.2 Functionality.

- Created new leave plans and personal holidays.
- Worked with technical leave to test custom leave accrual processes.
- Reviewed and created new eligibility and event rules tables for Benefits Administration.
- Mapped old leave plans to new leave plans.
- Updated all benefit programs to include new plans and new rules.
- Created new Earnings code to match the new leave plans and accruals.
- Revised and updated Earnings program table to capture new earnings codes.
- Tested new mappings and configuration.
- Ensured knowledge transfer was accomplished with payroll and benefit leads.

Bremer Bank
Lead Functional Consultant

- Served as Lead Functional Consultant for upgrade from 9.1 to Version 9.2, Image 24. This was a Fluid Integration project.
- Conducted structured design sessions of functionality for HCM including core HR including full position management, Benefits Administration, Life Events, eDevelopment, and eProfile. Position Management is being newly implemented.
- Configured tables needed for HCM, eProfile, Benefits Administration, and eDevelopment.
- Configured Activity Guides for new Life Events.
- Developed functional specifications for system modifications.
- Performed analysis of existing configuration tables.
- Worked with technical resources to convert Job Data to Position data.
- Created test scripts and conduct System Integration testing.
- Worked with team to document and remediate defects.
- Supported User Acceptance Testing.

Orangeburg Regional Medical Center
Lead Functional Consultant

- Served as Lead Functional Consultant for implementation of HCM on Version 9.2.
- Conducted structured design sessions of functionality for HCM including core HR and Health & Safety.
- Conducted design sessions for Employee Self Service and Manager Self Service.
- Configured tables needed for the implementation of Core HCM and ESS.
- Managed conversion efforts for HCM Core Data.
- Conducted structured design sessions of functionality for HCM including core HR including full position management.
- Worked with developer to determine the blueprint for how data would be mapped.
- Managed the identification and resolution of application issues.
- Escalated project issues, project risks, and other concerns.
- Provided postproduction support for HCM.
- Implemented Manager Self Service, including Dashboard, following ‘Go Live’.
- Supported configuration and testing for Open Enrollment.
- Gathered requirements for Open Enrollment processing.
- Performed analysis of existing configuration tables.
- Conducted System testing for Benefits Administration.

Navy Federal Credit Union
Lead Functional Consultant

- Served as Lead Functional Consultant in Upgrade from 9.1 and 9.2.

- Conduct structured walk-through sessions for new functionality released in 9.2 in Human Resources, Benefits Administration, Recruiting, and Employee Self Service.
- Implemented new 9.2 functionality including Life Events (eBenefits), Affordable Care Act (Benefits), and SES (Secure Enterprise Search) for recruitment and other functionality.
- Configured tables needed for the implementation of life events.
- Configured tables needed for the implementation of flexible processes (recruiting).
- Worked with users and ERISA attorneys to validate configuration for the Affordable Care Act.
- Managed conversion effort to integrate contractors as contingent workers.
- Managed effort to create retiree benefits configuration and enroll retirees into retirement benefits.
- Worked with teams to document and remediate defects.
- Provided postproduction support.

Asplundh Tree Expert Co.
Project Manager and Lead Functional Consultant

- Served as Project Manager and Lead Functional Consultant in Upgrade from 9.0 and 9.2.
- Created and maintained project plan and budget for project; project was completed on time and under budget.
- Created and managed cutover checklist for 'Go Live' activities.
- Conducted structured walk-through sessions for new functionality released in 9.2 in Human Resources, Benefits Administration, and Employee Self Service.
- Supported configuration effort.
- Created test scripts and conducted system integration testing.
- Supported User Acceptance Testing.
- Created cutover steps for modules
- Managed the identification and resolution of application issues.
- Escalated project issues, project risks, and other concerns.
- Provided postproduction support for TAM/CG.

Washington Metropolitan Area Transit Authority
Functional Consultant and Trainer

- Served as TAM/CG Functional Consultant in Upgrade from 8.8 to 9.1.
- Created test scripts using The Oracle User Productivity Kit (UPK).
- Conducted System Integration Testing.
- Supported User Acceptance Testing.
- Resolved configuration issues.
- Worked with TAM team to document and remediate Gap issues.
- Provided postproduction support for TAM/CG.
- Developed classroom content using UPK.
- Conducted desk side and classroom training for Talent Acquisition Management/Candidate Gateway, and Manager Self Service
- Delivered training to managers and executive officers in classroom and one on one.
- Conducted Train the Trainer (T3) Sessions for TAM/CG.

Hampton Roads Transit
Lead Functional Consultant

- Provided detailed guidance to HRT functional leads through re-implementation process.
- Provided "Best Practice" business and system knowledge.
- Prepared agendas for the structured walkthroughs of the PeopleSoft modules prototypes.

- Conducted the prototype sessions for Human Resources, Talent Acquisition. Manager/Candidate Gateway, Employee Self Service, Manager Dashboard, Talent Summary, Org Chart Viewer, Manager Self Service.
- Configured the initial prototype system based on business requirements.
- Led Requirement definition and Fit/Gap analysis.
- Assisted in resolving gaps, whenever possible, by recommending work-around, process improvement, customization, or modification.
- Analyzed current business processes.
- Developed business process vision and requirements.
- Lead conversion requirements, design, testing, and validation.
- Developed functional specifications.
- Oversaw and support testing the system to ensure that HRT requirements are met.
- Led system assessment, design, configuration/development, and testing.
- Escalated project issues, project risks, and other concerns.
- Reviewed all project deliverables and work products.
- Ensured that the project tasks are performed on schedule.
- Provided the appropriate templates and tools to the Module leads.
- Ensured all modules conform to project standards and guidelines.
- Created Conversion Validation Materials.
- Trained the trainers for Talent Acquisition/Candidate Gateway, Human Resources, Manager Dashboard, Employee Self Service, Training, and Professional Compliance.
- Created job aids for testing and implementation of new functionality.
- Staged database in preparation for training classes.
- Provided support to Trainers during their training sessions.
- Ensured knowledge transfer was accomplished with functional leads.
- Assisted with the management and resolution of BPR issues in each respective area.
- Identified detail tasks for Functional Team Members.
- Performed review and internal quality assurance on all application deliverables.
- Managed the identification and resolution of application issues.

Quest Diagnostics, Inc.
Lead Functional Consultant

- Served as Lead Functional Consultant for upgrade from 9.0 to 9.1 in the following areas: Human Resources, Benefits Administration, Employee Self Service, Manager Self Service, and eRecruit.
- Conducted assessment sessions for Human Resources, Benefits Administration, Employee Self Service, Manager Self Service, and eRecruit.
- Created design document sections for the following functionality: Human Resources, Benefits Administration, Employee Self Service, Manager Self Service, and eRecruit.
- Reviewed existing customizations with users to determine if customizations can be eliminated.
- Configured database to reflect new configuration specific to version 9.1.
- Created test scripts and assisting users during testing.
- Created job aids for testing and implementation of new functional.
- Staged database in preparation for training classes.
- Provided support to Trainers during their training sessions.
- Ensured knowledge transfer was accomplished with functionality leads.

Alion Science and Technology
Lead Functional Consultant

- Served as Lead Functional Consultant providing upgrade support in an environment going from 8.9 to 9.1.

- Reviewed and updated design documents for customizations to be retrofit to version 9.1.
- Led assessment session for Benefits Administration including Total Rewards.
- Assisted with writing of test scenarios and testing new functionality for HR, Benefits, and eRecruit.
- Provided support for Benefits, eRecruit, and Human Resources.
- Created test scripts and assisted users during testing.
- Created job aids for testing and implementation of new functionality.
- Staged database in preparation for training classes.
- Provided support to Trainers during their training sessions.
- Ensured knowledge transfer was accomplished with functionality leads.

Quest Diagnostics, Inc.
Lead Functional Consultant

- Served as Lead Functional Consultant to merge certain international populations into database with U.S. based employees.
- Served as Lead Functional Consultant to implement Manager Self Service.
- Provided functional support for testing of a custom non-employee page.
- Conducted fit/gap sessions for Manager Self Service.
- Created design document for Manager Self Service.
- Configured database for Manager Self Service.
- Created test scripts and assisting users during testing.
- Trained users on the new functionality being implemented.
- Created job aids for testing and implementation of new functionality.
- Ensured knowledge transfer was accomplished with functional leads.

Quest Diagnostics, Inc.
Project Manager and Lead Functional Consultant

- Served as Project Lead, Functional Lead, and Test Lead for implementation of PTO plans for portion of employee population via Benefits Administration. This population was previously enrolled in Vacation, Sick, and Float Holiday plans.
- Generated requirements document to capture functional requirements to be included and excluded from the implementation.
- Developed and managed Project plan.
- Created and assembled design document for the project.
- Configured set-up tables for Base Benefits and Benefits Administration.
- Created test scripts and test plan.
- Worked with technical resource to convert “old” leave plan accrual amounts to the “new” leave plans.
- Provided postproduction support.

Quest Diagnostics, Inc.
Project Manager and Lead Functional Consultant

- Served as Project Lead and Functional Lead for implementation of Talent Acquisition Manager (TAM) version 9.0 for large employee and external applicant population.
- Generated Requirements document to capture functionality to be included/excluded from implementation.
- Created and assembled design document for the project.
- Wrote test scripts and created test plan.
- Configured set-up tables.
- Managed and maintain the Project plan.
- Gathered requirements to convert data for 120,000 applicants from a 3rd party vendor, Authoria.

- Gathered custom requirements from two 3rd party vendors for integration with PeopleSoft.
- Participated in Resume Mirror configuration/functionality/issue resolution sessions for three products – Parsing, Search, and Post to Job Board.
- Assisted with the design and configuration for maintaining applicant assessment results from The Shaker Group.
- Conducted "Train the Trainer" training sessions for eRecruit and Resume Mirror/Talent Technology.
- Provided support to power trainers as they trained other users.
- Participated in analysis and testing of resolved issues.

Quest Diagnostics, Inc.
PeopleSoft HCM Functional Consultant

- Served as HR/Benefits Functional Lead for PeopleSoft v. 8.8 to v. 9.0 upgrade.
- Led Fit/Gap analysis sessions for HR, Benefits Administration, Recruitment, eCompensation, eBenefits, eCompensation Manager Desktop, eDevelopment, eProfile, and eProfile Manager Desktop.
- Configured new/modified table set-up.
- Created test scenarios and conducted system testing.
- Staged database in preparation for training classes.
- Created job aids for testing and implementation of new functionality.
- Provided support to Trainers during their training sessions.
- Ensured knowledge transfer was accomplished with functional leads.
- Assisted in compiling project documentation for Design Document.
- Participated in analysis and testing of PeopleSoft fixes.
- Participated in data validation process.
- Provided issue analysis and resolution.

Quest Diagnostics, Inc.
Project Manager and Lead Functional Consultant

- Served as Implementation and Functional Lead in an environment deploying eApps (eProfile, eDevelopment, eCompensation) in version 8.8 to a population of approximately 42,000 employees.
- Created test scenarios and conducted system testing.
- Created job aids for testing and implementation of new functionality.
- Staged database in preparation for training classes.
- Provided support to Trainers during their training sessions.
- Ensured knowledge transfer was accomplished with functional leads.
- Assisted in compiling project documentation for Design Document.
- Participated in analysis and testing of PeopleSoft fixes.
- Participated in data validation process.
- Provided issue analysis and resolution.

Education

- M.Ed., Education, Temple University
- M.Div., Regent University
- B.A., Humanities, University of Pittsburgh

Training & Certifications

- PeopleSoft Training: Human Resources, Base Benefits, Benefits Administration, Candidate Gateway/Talent Acquisition Manager, eApps
- Oracle 9.0 Certified PeopleSoft Enterprise HCM Implementation Champion

8.8 SAAD M. – PEOPLESOFT FUNCTIONAL CONSULTANT

Summary

- More than 17 years of extensive hands-on experience in leading and executing Oracle PeopleSoft projects.
- Expert in Financials, Supply Chain (FSCM) & Enterprise Service Automation (ESA).
- Latest project experience: PeopleSoft AWS 9.2 Transition
- Well versed with Oracle's Implementation and Production Support Methodology.
- Extensive experience in managing client (business & IT) expectations, project SLAs and project plans.
- Extensive experience in leading & managing project teams (onsite, offshore & near shore).
- Excellent team player. Can work independently as well.
- Expert in coaching junior staff members.
- Excellent written and verbal communication skills. Can explain complex technical subjects in simple language.
- Expert in designing complex enhancements/ customizations.
- Expert in resolving month end issues for business.
- Expert in designing integration solutions between PeopleSoft and third-party solutions like Clarity, Maximo and Lawson.
- Extensive experience in integration between PeopleSoft FSCM & PeopleSoft HCM.
- Extensive experience in designing data conversion solution for various PS Modules.
- Have led initiatives to merge business processes as a result of acquisitions. This includes business process design and conversion.
- Excellent data analysis skills using SQL, PS Query, NVision & PeopleSoft data model (ERD).
- Experience in reviewing, configuring and maintaining approval workflow engine (AWE).
- Extensive experience in requirements analysis, fit gap analysis, design, development, customizations and implementation of PeopleSoft modules.
- Proficient in analyzing and translating business requirements to functional/technical requirements.
- Extensive experience in developing business case documents, fit-gap documents, functional/technical specification document, configuration workbooks, test plan/cases, projects plans, classroom pilot activity and training.
- Extensive experience in reviewing production issues and finding the root cause (RCA) with defined SLA.
- Experience in using incident management tools like JIRA, Service-Now etc.
- Experience in using reconciliation tools like Frontier and reporting tools like OBIEE and Essbase.

Skills

- **Modules:** General Ledger, Travel & Expenses, Project Costing, Asset Management, Accounts Payable, Purchase Order, Grants Management
- **Project Activity:** Requirements Gathering, Fit Gap, Gap Analysis (RICEW), Config Design, Conversion, Test Planning, Training, Defect Resolution, Cut Over Planning, Post Go-Live Support & Production Support
- **Project Management:** Business Transformation, PMBOK Framework, Change Management & Business Process Reengineering.

AARP, Washington DC **Mar 2020 – Present**
PeopleSoft AWS Transition
Delivery Manager
Environment: PeopleSoft FSCM 9.2, HCM 9.2 & IH 9.2

- Lead the effort to transition PeopleSoft systems to AWS.

- Led the preparation of project plan and coordinated scrum calls.
- Coordinated design discussions with client users.
- Coordinated testing and issue resolution discussions with multiple vendors.
- Coordinated cutover and go-live activities.

CorVel – Portland, OR Nov 2019 - Feb 2020
PeopleSoft Financials Support & Enhancements
Functional Architect
Modules: Assets, Payables & Ledger
Environment: PeopleSoft FSCM 9.2

- Lead the effort to review and resolve issues with Asset Management system
- Lead the design of custom PO interface to PeopleSoft Payables system
- Reviewed and resolved issues with NBV, Depreciation, Adjustment and accounting entries.
- Led the design for data conversion for book & profile change.
- Led the design for a new interface with PO data to PeopleSoft Payables.

MetLife – Tampa, FL Jun 2017 - Aug 2019
PeopleSoft Financials Implementation & Support
Manager/Lead
Modules: Assets, Expenses, Payables & Ledger
Environment: PeopleSoft FSCM 9.1 & 9.2

- Lead the implementation & merger of Asset Management business processes for Latin America & Gulf business units.
- Provide global operations support (LATAM, ASIA) for Assets, Expenses, Payable & Ledger
- Lead the integration activities of third-party interfaces to General Ledger (LATAM, ASIA)
- Provided guidance on configuration items like profile, categories, asset books, asset data conversion & depreciation.
- Resolved issues with multi-currency, payments, credit card expenses, net book value of converted assets, journal issues etc.
- Addressed reconciliation issue between third party systems and general ledger using Frontier and Essbase reporting tools.
- Trained several staff members on new tools and business processes ledger, procurement, payables and asset management.

School District Manatee – Sarasota, FL May 2016 - Jun 2017
PeopleSoft Financials Implementation
Manager/Lead
Modules: Projects, Grants & Contracts
Environment: PeopleSoft FSCM 9.2, HCM 9.2

- Lead implementation of Projects, Grants & Customer Contracts
- Lead the implementation of integrations like HR to Finance (FSCM), Finance (FSCM) to Payroll, Projects to Billing/Receivable
- Planned and led activities like future state documentation, fit gap, requirements traceability matrix, functional specs, project & grant data conversion and configuration.
- Maintained detailed project plan to implement projects, grants & contract modules.
- Led the activities to enable PS integration for Employee Data, Project Costing, Grant Awards, Time and Labor & Payroll, Billing & Accounts Receivable

MetLife – Tampa, FL Aug 2014 - Feb 2016
PeopleSoft Financials – Support & Enhancement
Business Systems Lead

Modules: Assets, Expenses & Ledger
Environment: PeopleSoft FSCM 9.1 & 9.2

- Address issues reported by issues in Assets & Ledger (Americas, LATAM & EMEA)
- Lead implementation of new credit card for Expenses
- Lead account synchronization using DRM tool (Americas, Asia, LATAM & EMEA)
- Assisted in resolving several issues in Asset Management including integration, NBV, depreciation, capitalization threshold, excel to CI, asset conversion, mass change etc.
- Assisted in resolving several issues in General Ledger including language table, revaluation, inter unit, reconciliation, conversion etc.
- Completed fit gap, functional spec for credit card implementation (expenses)
- Led the activities for account synchronization project using DRM – planning, design, testing and roll out.
- Led training activities for ledger and asset modules.

AARP – Washington DC Jan 2013 - Aug 2014
PeopleSoft Financials – Implementation & Support
Manager/Lead
Modules: Project, Grants Expenses, Assets etc.
Environment: PeopleSoft FSCM 9.2, HCM 9.2

- Assist the project team in Orals.
- Lead implementation for Project Costing & Expenses
- Lead post go-live production support activities for FSCM 9.2
- Led the activities for Fit Gap, Gap Analysis & Requirements Traceability Matrix (RTM) for Project Costing, Grants and Expenses.
- Led system configuration & user training in Expenses and Project Costing
- Led resolution of issues for post-production & data conversion for various business areas like Assets, Payables, Project Costing, Grants, Ledger & Expenses
- Worked with UPK developer to develop training materials for Projects, Grants, Expenses & Assets

Oncor– Dallas, TX Apr 2012 - Dec 2012
PeopleSoft Financials – Implementation
Functional Lead
Modules: Payables & Ledger
Environment: PeopleSoft FSCM 9.1

- Lead implementation for Accounts Payable
- Lead transition of Ledger support services to a new team
- Reviewed current state with the users and proposed future state model.
- Completed Fit Gap, Gap Analysis & Requirements Traceability Matrix (RTM)
- Completed design & configuration.
- Planned activities & led transition activities when the client switched support vendors.
- Led the knowledge transition activities for the project.

AH BELO – Dallas, TX Jul 2009 - Mar 2012
PeopleSoft Financials – Support
Manager/Lead
Modules: Expenses, Payables, Asset & Ledger
Environment: PeopleSoft FSCM 8.8

- Lead functional production support.
- Design solutions for enhancements
- Addressed ongoing issues with production system in various business areas like Expenses, Ledger, Payables and Assets.

- Proposed changes to design for Travel & Expenses – design, configuration, specifications & testing.
- Led functional training activities for business users & technical users.

Sutherland – Chennai, India Jan 2009 - Jul 2009
PeopleSoft Financials – Support & Upgrade
Manager/Lead
Modules: Expenses, Payables, Asset & Projects
Environment: PeopleSoft FSCM 8.9 & 9.0

- Lead functional production support for Expenses, Payables, Asset & Projects
- Design solutions for enhancements
- Lead the chartfield redesign activity.
- Addressed ongoing issues with production system including month end reporting and closure.
- Led design & fit gap sessions for Project Costing, Travel & Expenses and Asset Management
- Completed requirements, design and configuration for upgrade project.

Jefferies – New York, NY Oct 2007 - Nov 2008
PeopleSoft Financials – Implementation
Functional Lead
Modules: Projects & Contracts
Environment: PeopleSoft FSCM 9.0

- Plan & lead implementation activities
- Assist the team in project Orals.
- Reviewed current state with the users and proposed future state model.
- Completed Fit Gap, Gap Analysis & Requirements Traceability Matrix (RTM)
- Completed design & configuration.
- Completed set up of data flow from Projects to Contracts to Billing to Receivables
- Completed configuration and specification for customizations & interfaces.

MetLife – New York, NY Feb 2004 – Sep 2007
PeopleSoft Financials – Support & Implementation
Functional Lead
Modules: AR, Billing, Projects & Time Entry
Environment: PeopleSoft FSCM 8.8 & 8.9

- Lead retrofitting activities post upgrade.
- Review current state process and recommend future state process.
- Plan & lead implementation activities for Project Costing & Time Entry
- Completed enhancements & retrofitting activities for General Ledger (upgrade)
- Completed Fit Gap, Gap Analysis, functional specifications & configuration (AR/Billing)
- Completed classroom pilot sessions for Project Costing & Time Entry (Expenses)
- Prepared a strategy document to manage overtime in the organization (Expenses)
- Prepared test plan for integration testing of Project Costing module with other modules like Travel & Expenses, Accounts Payable, Asset Management and General Ledger.

Education

- Bachelor of Technology (BTech) in Electronics & Communications

Certifications

- PMI Project Management Professional (PMP)
- Oracle PeopleSoft 9.2 Financials Certified Implementation Specialist
- Oracle PeopleSoft Payables Certified Implementation Specialist
- Oracle PeopleSoft General Ledger Consultant Certified Expert

8.9 PURNA C. – AWS ARCHITECT

Summary

Purna is an AWS Architect experienced in the development of technology stacking. With nearly 10 years of professional experience in business/system analysis, design, build and test of scalable solutions and implementing DEVOPS processes for agile projects. Expertise in provisioning, operating, and managing distributed application systems.

Skills

Languages	Python, Shell Scripting, Java, Groovy, MatLab, HTML, CSS, JavaScript
DEVOPS Tools & Technologies	All AWS Services, Docker, ELK Stack, Jenkins, Terraform, Concourse CI, Travis CI, Git, Vagrant, Ansible/Chef, Active Directory, OpenVPN, JFrog Artifactory, Apache Maven, JIRA, Bosh, SonarQube
Frameworks	Serverless, Robot, PyTest, Spring
Concepts/ Techniques	Programming, Serverless, Source Control, Build and Release, Configuration Management, Continuous Integration and Deployment, Infrastructure Automation, Container Concepts, Orchestration, Monitoring, SDLC, Agile Methodology, Networking Protocols, Cloud
Virtualization	Amazon Web Services, VMware ESX/ESXi, Fusion, VirtualBox
Operating Systems	Linux CentOS/Ubuntu, MacOS, Windows
Databases	Dynamo DB, Influx DB, MongoDB, Elastic Search
Visualization Tools	Grafana, Kibana

Professional Experience

ERP Analysts, Inc., Dublin, OH **Jun 2018 – present**
Sr. Cloud Architect

- Develop, build, test, deploy, maintain, and manage AWS cloud-based systems, to ensure the availability, performance, scalability and security of production and non-production systems.
- Architect, design and develop ActiveGenie™, a centralized solution for managing, monitoring and maintenance of cloud-hosted ERP environments (https://activegenie.com).
- Automate infrastructure management tasks such as server or cluster provisioning, patching, operating system maintenance, capacity provisioning and automatic scaling.
- Created recipes for automating the infrastructure, deployment processes.
- Create coding best practices for existing development teams.
- Implement best practice cloud security principles on a broad range of AWS technologies, operating systems (Windows, Linux), database systems (Oracle DB, SQL Server) and PeopleSoft application environments (Web, App).
- Migrate existing enterprise applications to a self-serviceable serverless architecture to increase agility and availability of the systems.
- Rapid-provisioning and lifecycle management of systems and code using Git, Jenkins, Chef, and custom automated scripts.
- Implement chef cookbooks for OS component configuration to keep AWS server's template minimal.
- Ensure application integrity and quality, by designing templates and maintaining Infrastructure as a Code (IAC) using Terraform and CloudFormation, in version-control systems.
- Automate deployments through use of configuration management including Chef, Ansible.
- Perform software artifact management and distribution.

- Automate enterprise application environments' build and deployments using Docker, Git, Code Commit, Jenkins, S3, Elastic Container Repository and Elastic Container Service.
- Develop lambda functions to execute code for data validation, filtering, or other transformations in response to data changes, shifts in system state, or API end-point triggers.
- Design and develop strong cloud-based software architectures to build secure, highly scalable and flexible systems to handle expected and unexpected load bursts.
- Trace complex build problems, release issues and environment issues in a multi-component environment.
- Providing technical guidance and leadership to all teams.
- Suggest deployment patterns and practices, improvements based on learnings from the past deployments and production issues.
- Promote a DevOps culture, including building relationships with other technical and business teams.

Major Electronics Company, Richardson, TX Jul 2016 - Jun 2018
DEVOPS Engineer

- Continuous Integration and Testing for Project Symphony (An entirely Open-Source Project: https://github.com/dellemc-symphony)
- Design and Test pipelines integrating Git, Vagrant, Jenkins, Automation Frameworks and many more tools across geographically separated hosts.
- Setup the entire pipeline infrastructure for the organization which integrates 172 git repositories for code build and deploy.
- Build groovy shared libraries to enable execution teams to seamlessly build their projects.
- Containerize applications into micro-services using docker, in world of Symphony, which was the open-source software being developed for vBlocks and vxRacks.
- Automate Software deployment using VMware tools & resources on cloud computing virtualization platforms.
- Create Branching and Versioning strategies across different projects & code-base languages.
- Developing automation of software builds, packaging, and deployments.
- Working with developers, stakeholders & SMEs to identify and resolve issues.
- Collect new technologies and tools and introduced them to the company; in which way it helped the company build up an agile development environment and improved work efficiency.
- Adding to code quality, review & analysis by creating quality gates & coverage metrics, using SonarQube for private projects, and CodeCov & Codacy for open-sourced projects.

Major Financial Services Company, Chennai, India Dec 2013 – Jul 2014
Software Quality Engineer

- Quality Analysis and support for the eCommerce Online Banking Application of Client. Major project with over 50 million users worldwide.
- Test effort estimation, Test planning, Test case design and execution ensuring complete coverage of business requirements.
- Create and/or review Manual/Automation test strategies, test plans, test cases, and test data.
- Facilitate test status/defect meetings and help prioritize defect fixes.
- Coordinated with onsite Business Analysts and handled the daily scrum calls debriefing on the statuses and issues.

Auction Website, Chennai, India May 2012 – Dec 2013
DEVOPS Engineer

- Automate system level testing using the CI system whenever a code check in happens.
- Expertise in using build tools like Maven for the building of deployable artifacts from source code.
- Build test automation libraries to help external teams automate their new software features.

- Developed a notification system that notifies the committer about the SLT result of their code check-in which improved the work efficiency by 50%.

Public Research University, NJ **Apr 2015 – May 2016**
Lecturer
Course: Computer Applications for Business
Topics: JavaScript, HTML/CSS, Database Concepts

Education

- Rutgers University - Master of Science in Computer Science
- KITS - Bachelor of Technology in Mechanical Engineering

8.10 ADAM L., PHD – TRAINING & OCM CONSULTANT

Summary

- Distinguished 15-year career reflects continual advancement, a depth of valuable and diversified leadership experience, and consistent organizational optimization achievements that assisted in driving innovative, cost-effective improvement strategies, and programs.
- Seasoned E-Learning development veteran through the use of multiple software platforms and programs.
- Strong ERP Training with a focus in Financial Applications such as Workday and PeopleSoft.
- Passionate about quality and streamlined processes that deliver higher standards of customer facing solutions.
- Record of improving efficiency, productivity, reducing cost of operations and improving company profitability by process improvement.
- Outstanding interpersonal, communication, presentation, change management skills, client-facing professionalism, as well as being an articulate, self-motivated, and industrious project implementation professional.

Professional Experience

Northeast Georgia Health System, Atlanta, GA **May 2022 – Present**
Workday Training and Change Advisor
Served in an advisory capacity to an inexperienced Training and Change team. Worked directly with training developers to help prepare them for go-live. Assisted in the formulation of the training strategy ensuring all stakeholders were well cared for. Workday implementation included the main modules of Banking & Settlement, Financial Accounting, Customer Accounts, Procurement & Supplier Accounts, Expenses, Projects, Learning, Business Assets, as well as all of the HCM modules of Workday except time tracking since they utilized Shift Wizard.

- **Project Management -** Developed needs analysis, training tenant strategy and training strategy and plan for the different deliverables needed to complete in person and remote training of the organization.
- **Operations –** Leveraged relationship with SMEs to ensure all voices were heard in the formulation of the training plan. Used a comprehensive evaluation strategy to ensure that training was effective and success measurable.
- **Relationship and Team Management –** As a training team, held each other accountable to delivery dates and deadlines. Ensured that Change Management was consulted and updated on all training related developments. Leveraged that partnership to take care of the organizational readiness, to ensure the delivery could take place on time and be successful.

Aurora Health, Chicago, IL **Dec 2020 – May 2022**
Workday Financials Facilitator, Leadership Focus
Worked collaboratively with different departments across the organization to design Workday training opportunities. Worked directly with leaders to help prepare them for go-live. Developed and delivered financial training to PSAs, and other leaders. Participated in the development of the training strategy specifically catered to leadership in the organization. Workday implementation included the main modules of Banking & Settlement, Financial Accounting, Customer Accounts, Procurement & Supplier Accounts, Expenses, Projects, Learning, Business Assets, as well as all of the HCM modules of Workday except time tracking.

- **Development -** Developed training for Workday Financials that included developing and executing a training strategy for entire organization (300,000+ Employees), working with internal SMEs as well as other contracted vendors to set existing resources up for success, post go-live.

- **Operations -** Consulted with cross-functional leadership and financial associates to create engaging, action-oriented, measurable training for every associate. Used data-driven decision making to innovatively improve content and program offerings.
- **Relationship and Team Management –** As a core training group, developed working relationships with all relevant leaders to ensure communication was accurate, as well as development and delivery could take place on time and be successful.
- **E-Learning Software tools utilized:** Camtasia, Captivate, SharePoint, Adobe Acrobat Pro, Microsoft Office 365 Suite, Snagit.

The Standard, Portland, OR **Aug 2020 – Dec 2020**
Instructional Designer, Workday Learning Consultant (Financials)
Worked collaboratively with different departments across the organization to design Workday training opportunities. Worked directly with Subject Matter Experts to document processes and propose training solutions. Designed complex interactive trainings, multi-faceted learning solutions as well as contributed on numerous project teams to offer innovative learning opportunities. Workday implementation included the main modules of Banking & Settlement, Financial Accounting, Customer Accounts, Procurement & Supplier Accounts, Expenses, Projects, Business Assets as well as numerous training pieces developed for the FDM and basics of Workday.

- **Development -** Developed training for Workday Financials that included developing and executing a training strategy for entire Standard system (5,000 Associates), working with internal SMEs as well as setting existing resources up for success, post go-live.
- **Operations -** Consulted with cross-functional leadership and financial associates to create engaging, action-oriented, measurable training for every associate. Used data-driven decision making to innovatively improve content and program offerings.
- **Relationship and Team Management –** As a core training group, developed working relationships with all relevant SMEs to ensure development and delivery could take place on time and be successful.
- **E-Learning Software tools utilized:** Adobe Premier, Captivate, SharePoint, Adobe Acrobat, Microsoft Office 365 Suite, Snagit

OhioHealth, Columbus, OH **Sep 2018 – Apr 202**
Senior Consultant, Workday Learning Consultant (Financials/HCM)
Worked collaboratively with different departments across the system to design complex learning opportunities. Managed large scale projects like Workday Financials and HCM (From Peoplesoft & Lawson) & FSC (Utilizing Ariba) to small scale projects. Designed complex interactive trainings, multi-faceted learning solutions as well as contributed on numerous project teams to offer innovative learning opportunities. Responsible for management of external consultants, and OhioHealth associates on the Workday projects, as well as for numerous other Learning projects.

- **Training Focus/Lead –** Training Lead for Workday Finance & Supply Chain ((Business Assets, Accounts, Accounting, Journal Entries, Budgeting, Forecasting)
- Developed training for Workday HCM that included developing a training strategy for entire OhioHealth system (30,000 Associates), managing external consultants as well as maintaining Workday HCM resources post go-live. Logistics Manager for Learning Week that included management of all the major parts of the initiative. Modules covered: Benefits, Payroll, Personal Info, Career Navigation, Open Enrollment.
- **Operations -** Consulted with cross-functional leadership and learning associates to create engaging, action-oriented, measurable training for every associate. Used data-driven decision making to innovatively improve content and program offerings.

- **Relationship and Team Management** – Established professional network of contributors for the organizations largest event: an annual Learning Week. Helped create and promote professional development related events for all associates.
- **E-Learning Software tools utilized:** Ariba, Lectora, Articulate, Storyline, Captivate, Vyond, Camtasia, Adobe Photoshop, Microsoft Office 365 Suite

Ohio University, Athens, OH **Nov 2017 – Aug 2018**
Webmaster
Worked collaboratively with Libraries staff, Faculty, Office of Information Technology staff, and vendors. Served as the primary developer for the Libraries' online sites and services. Maintains the Libraries' web presence, developed new sites and features, troubleshoots problems, and proactively oversaw web operations. Provided oversight, guidance, and training to the Assistant Webmaster, as well as other library staff.

- **Operations -** Made recommendations for continued and future usage of many library systems, including the migration of the main library site from WordPress to Drupal, the relocation of seldom used page extensions, the setup of office development environments for future web services employees.
- **Compliance** – Ensured websites were in full compliance with university disability policies and procedures, as well as federal accessibility standards and made changes when applicable.
- **Project Management Focus** – Oversaw, managed Web Services projects, and worked with other library areas to ensure compliance and understanding. Served as the primary Web Services presence on library project committees.
- **Sample projects**– Staff Directory update, Digital Archives Rebranding, WordPress to Drupal Conversion, Documentation Standard Process.

Ohio University, Athens, OH **Nov 2015 – Aug 2017**
e-Learning Financials Trainer (PeopleSoft ERP)
Leveraged technological understanding and expertise to help the department develop effective in person and e-learning training modules for Faculty and Staff. Brought an expertise in various subject matters to improve on the depth of trainings to be provided. Responsible for being a project manager and coordinating with several OHIO employees to deliver effective trainings. Developed a systematic approach to measure the knowledge transfer and training satisfaction using various follow-up techniques.

- **Financials Training and Development -** Shepherded the creation and development of multiple training modules for PeopleSoft including: Absence Management, Excel, Financial System Enhancements, Customer Service, Camtasia, Onboarding and Lectora. Oversaw the maintenance and support aspects of these trainings.
- **Instructional Design.** Facilitated and participated in the analysis, design, development, and evaluation of instructional systems for web and hybrid-based training.
- **Relationship and Team Management** – Helped established infrastructure of training systems and methodology to handle campus requests. Created professional development opportunities for staff of all levels of leadership. Participated in the hiring process of team members.
- **Compliance -** Ensured compliance with university policies and procedures and recommended changes when applicable.
- **E-learning Software tools utilized** – Storyline, Intrepid, Captivate, Camtasia, Adobe Photoshop, Microsoft Office 365 Suite

Family Works, Inc., Athens, OH **Jun 2007 – Nov 2015**
Director of Online Programs/Training
Led operations for evidence-based parenting education products sold through numerous channels (Many included higher education institutions). Oversaw product development, customer service, project

management, technological improvement, and instructional design for the online offerings. Personally managed and strengthened 50 major account relationships. Developed hiring standards and training programs for new employees.

- **Product Development & Instructional Design.** Converted live training courses to online courses. Some trainings were to be completed by staff in distant locations as well as facilitated hybrid course completion including synchronous and asynchronous activities.
- **Operations -** Oversaw and managed the complex aspects of the companies online curricular offerings: Parenting Wisely and Children in Between. This included aspects of product development, budget, customer service, project management, technological improvement, human resources, client advising and instructional design. Assisted in the teaching, development, and evolution of the online courses.
- **Compliance -** Ensured compliance with the laws of each state the company was involved in as well as made sure it was compliant with court and juvenile justice administrators. Regularly met with decision makers and recommended changes to assist their adoption of our services or improvements to their model of delivery.
- **E-Learning Software tools utilized** – Lectora, Articulate, Storyline, Captivate, iMovie, Adobe Photoshop, Microsoft Office 365 Suite

Education

- Doctor of Philosophy: Instructional Technology, Ohio University
- Master of Education: Computer Education & Technology, Ohio University
- Professional Instructional Design Certificate, Ohio University
- Bachelor of Science: Business Administration, University of Arizona

8.12 BRIAN D. – OCM CONSULTANT

Summary

- Prosci Certified Change Management Lead with over ten years of experience in Change Management and Training Development within many industries and Big 4 experience. Generally responsible for OCM Workplan, OCM Strategy, Communications Strategy, Training Strategy, Change Impacts, Stakeholder Analysis, Course Curriculum, Go-Live, and Hypercare that resulted in faster adoption across all affected groups, increased proficiency, and utilization of the new system.
- Responsible for leading Steering Committee/Leadership meetings to provide insight and updates.
- Currently seeking full-time or consulting/contract work.

Professional Experience

Wendy's Corporate, Dublin, OH **Jul 2022 – Jan 2023**
Role: Change Management Lead

- Led the Change Management of the Microsoft Dynamics 365 Information Gateway Development Agreements enhancement project for Wendy's including the OCM Workplan, OCM Strategy, Communications Strategy, Training Strategy, Change Impacts, Course Curriculum, Go-Live, and Hypercare that resulted in faster adoption across all affected groups, increased proficiency and utilization of the new system.
- Also responsible for leading Steering Committee/Leadership meetings to provide insight and updates to high-level Wendy's leadership.

Deloitte, Houston, TX **Apr 2021 – Jan 2022**
Role: Change Management Lead

- Led the Change Management of SAP Ariba implementation including documented the OCM Workplace, OCM Strategy, monitored and documented the Change Impacts, drafted the Course Curriculum and Role Mappings as well as drafting and conducting the Stakeholder Analysis for 23 departments across the City of Houston, TX through both the upstream (Strategic Sourcing) and downstream (Procurement) rollout phases a well as Hypercare and facilitating Leadership meetings.

American Electric Power, Columbus, OH **Jan 2021 – Apr 2021**
Role: Change Management Lead

- Organizational Change Management lead for Transmission and Continuous Improvements including stakeholder engagement, communication strategy, learning strategy, learning and development, and process improvement for all projects that received funding.

Navigator Management Partners, Columbus, OH **Jun 2018 – Feb 2020**

- Cardinal Health - OCM for SAP S/4HANA implementation and SharePoint creation and administration/management for a global initiative after an M&A.
- NiSource – OCM for SAP SLP/Ariba/Fieldglass supply chain implementation, business process design and improvement, project planning and management, training and development and delivery for over 7,000 users in seven states, SharePoint creation/maintenance, writing test scripts, system and User Acceptance Testing (UAT) testing.

Limited Brands, Dayton, OH **Jan 2018 – Jun 2018**
Role: Senior Consultant

- Led the Contact Call Center (CCC) Change and Learning & Development team through the change impacts, learning strategy, training plan, milestone tracking and completion (Jira/Confluence), template development, and resource management for the new

- enterprise-wide Order Management System (OMS) as part of a $100mil go-to-market product improvement.

The Mosaic Company, Cleveland/Akron, Ohio **Aug 2017 – Jan 2018**
Role: Senior Consultant

- Dominion Energy –Managed change impacts while facilitating the design, development, and delivery of scenario-based instructor-led compliance training for natural gas employees.
- Developed instructor-led training materials including instructor guides, participant guides, and job aids while managing them in Xyleme Learning Content Management System (LCMS).
- Also developed rigorous knowledge check questions verified through SME answer validation to corroborate understanding and adherence to the material.

Navigator Management Partners, Columbus, Ohio **Feb 2017 – Aug 2017**
Role: Senior Consultant

- OptionCare – Assisted in every aspect of change management and training development and for a new electronic health records (EHR) system from training strategy to storyboards, and development of the material in Camtasia and Articulate Rise, as well as administration of Grovo Learning Management System (LMS).

Ventech Solutions, Columbus, Ohio **Oct 2016 – Jan 2017**
Role: Senior Consultant

- Center for Medicare/Medicaid: Leader of a four-person team that designed, developed, and delivered over 290 eLearning modules that covered all internal business processes and maintained the modules in CenterPoint LMS.

Cardinal Health, Dublin, Ohio **Jan – Oct 2016**
Role: Senior Consultant

- Led the change of the onboarding process from a 53-page paper process to completely digital.
- Reduced the onboarding handling time from 14 business days to 1 business day.
- Created training for the entire Managed Care team and integrated a SharePoint workflow to eliminate the need for a $40,000 Salesforce tool.
- Created a 600-page onboarding manual covering the entire onboarding process and all possible scenarios.

State of Ohio, Columbus, Ohio **Jun 2014 – Dec 2015**
Role: Consultant

- Designed, developed, and delivered PeopleSoft 9.2 instructor-led training (ILT), eLearning (WBT/CBT), instructor guides, participant guides, and job aids,
- The audience consisted of entry-level to C-level, 6,500 super-users, and over 60,000 employees who were responsible for the $8bln annual budget.

Pearson, Westerville, Ohio **Jan 2013 – Jun 2014**
Consultant

- Evaluated and scored responses for K-12, college entrance, and professional certifications to open-ended questions in a reliable manner and rate per the client-supplied scoring guidelines.

Education & Certifications

- Bachelors of Science in Organizational Communication, Ohio University
- Prosci Change Management Practitioner
- Project Management for Learning Professionals
- Teaching Adult Learners
- Leadership Development
- Adobe Captivate

8.13 BRANDON M. – SECURITY & FEDERATION SERVICES CONSULTANT

Skills

- Excellent Written & Oral Communication
- Internal Auditing
- Third Party Security Control Evaluation
- Third Party Risk Management (TPRM)
- Policy Development
- RSA Archer Expertise
- One Trust Expertise
- Risk Analysis
- MS Office Suite Expertise
- Asset Protection
- Risk Assessment
- Privacy & Control Management
- ISO 27001/27002 implementation
- PCI DSS
- Risk Mitigation Strategies
- Conducting Control Assessments
- Information Security Management Systems
- Regulatory Compliance (e.g., GDPR, HIPAA, SOC 1&2 Reports)
- Strategic planning; critical thinking; analytical problem solving; mediation; Microsoft office suite; abstract thinking; logical assessment; public speaking; critical reading and concise writing; research; adaptability; time management; team oriented; SaaS; network administration; troubleshooting.

Professional Experience

U.S. Department of Health and Human Services (HHS), Bethesda, MD(Remote) **Mar 2022- Current**
Senior Compliance Analyst
Security Clearance

- Conducted risk assessments and gap analysis for the department's operations, including data privacy, security, anti-money laundering (AML), sanctions, export control compliance.
- Developed a comprehensive training program to educate government employees on regulatory requirements and internal controls related to financial reporting and cybersecurity risks.
- Analyzed cutting edge technologies that would affect government security posture as well as managed risks.
- Assisted with the implementation of the recently updated ISO 27002 framework to improve security posture by 30%.
- Implemented phishing campaigns and created government-wide user security awareness training.
- GRC SME: Created & implemented a Third-Party Vendor portal to onboard vendors, track and remediate vendor risks.
- Serve as a key member of the department's information security compliance team by supporting ongoing compliance activities and monitoring across different GRC regulations and standards for mapping controls such as HIPAA, ISO, FEDRAMP, NIST, PCI, MITRE ATT&CK and more.

Vanguard Financial Group, Malvern, PA **Jun 2018 – Mar 2022**
Policy & Compliance Analyst

- Assisted in the development and implementation of compliance management processes, policies, and procedures.

- Manage 5+ teams ranging from 5-50 people across multiple sites.
- Communicate expectations; planning, monitoring, appraising, and reviewing contributions.
- Plan and review compensation actions; enforcing policies and procedures
- Contribute operations information and recommendations to strategic plans and reviews; prepare and complete action plans; implement production, productivity, quality and customer-service standards; resolve problems; complete audits; identify trends.
- Communicated with business units to ensure understanding and compliance with policies and frameworks and provided training and guidance on compliance requirements.
- Coordinated business unit internal and external audit engagement processes, developed response materials and action plans to audit findings, and tracked findings and remediation efforts.
- Analyze process workflow, employee and space requirements and equipment layout; implement changes.
- Developed a comprehensive training program to educate employees on regulatory requirements and internal controls related to financial reporting and cybersecurity risks.
- Communicate with vendors to address risk issues and ensure remediation efforts are tracked and completed.

Vanguard Financial Group, Malvern, PA **Oct 2017 – Jun 2018**
Vendor Management Analyst

- Craft annual action plans, corrective compliance education and training material to distribute across company staff.
- Provide training to address compliance, technical, and procedural requirements, and maintain knowledge of current and proposed laws, regulations, industry standards, and ethical requirements related to information security and privacy.
- Completed outbound call and electronic communications to internal and external stakeholders.
- Conduct monthly audits of internal and external communications and procedures to ensure corporate compliance.
- Conduct due diligence assessments on potential vendors to evaluate risk exposure.
- Review vendor contracts and ensure compliance with contractual obligations
- Collaborate with cross-functional teams to evaluate risks and processes, and ensure the existence of compliant controls, processes, and procedures.
- Perform activities to measure, monitor, and report compliance, and support certification/audit efforts and perform gap analysis.

Education & Certifications

- Indiana University of Pennsylvania, May 2017, B.S. Accounting, Indiana, PA
- ISC^2 Certified in Cybersecurity - Completed Nov 2022
- CompTIA- Security+ - Completed May 2023
- Google Cybersecurity Certification - Completed May 2023
- Google Cybersecurity Certificate & CompTIA Security+ dual credential - Completed May 2023
- Cybersecurity & Infrastructure Security Agency (CISA)
- Cyber Supply Chain Risk Management
- Risk Management Framework for Leaders
- FedRAMP — A Leader's Dashboard for Compliance

8.14 BURHAN H. - MICROSOFT AZURE & M365 CONSULTANT

Professional Experience

3M, Texas Jul 2020 - Present
Microsoft Azure/M365 Engineer

- Deployed, Configured, Maintained Compute on Azure Cloud Setup, DR for Azure Resources
- Performed Migration On-Premises resource to Azure using Azure Site Recovery
- Experience in Azure Optimization and cost saving
- Troubleshooting Azure related issue
- Performed Migration from On-Prem servers to Azure ARM
- Worked on Azure Active Directory
- Worked on SSO & MFA
- Created resource in RG like VNet, Storage account, Availability Set, Load Balancer in ARM portal.
- Decommissioned of Virtual machine and prerequisites before decommissioning and check list
- Added/Deleted hard disk of virtual machine.
- Worked on Resource Manager using ARM templates and Power shell.
- Worked on Azure SQL and database migration.
- Worked on networking concepts like VNet, Load balancer, Traffic manager and IP addresses.
- Used Azure Diagnostics for fetching logs and monitor performance issue.
- Deployed, configured, Maintained Compute on Azure Cloud through PowerShell and portal.
- Troubleshot Azure related issues and engage internal teams for issue resolution.
- Worked on Azure Support Center (ASC) tool for fixing virtual machine.
- Excellent in identifying and troubleshooting of minor & critical problems occurring on the VM
- Worked on SIEM for managing tenants in Azure AD
- Managed SIEM Servers Data
- Used Azure Defender to secure users' domains.
- Protected users' data using Azure Defender

The Walt Disney Company Burbank, CA, May 2018 - Jul 2020
MS Azure/O365 Engineer

- Worked as Azure Cloud Administrator, configuring VMs, storage accounts, resource groups.
- Remote Login to Virtual machines to troubleshoot, monitor and deploy applications.
- Troubleshot Azure VM, Windows Server, Azure Active Directory, MFA, and physical infrastructure
- Good understanding in Auto Scaling and High Availability
- Understanding in Load balancers, NSG, DNS, Virtual Networks and Firewall in cloud environment
- Troubleshot Azure AD issues.
- Managed and optimized user profile management
- Managed Virtual machine (start/stop/restart) and health checks.
- Worked in Azure IAAS components and PAAS components.
- Built Azure components as per the requirement of the project.
- Worked in Azure load balancer, application gateway troubleshooted on the said components, configuring rules as per the requirement of the customers.
- Worked on Pass components configuration Azure SQL PAAS, Azure Bastion
- Configured storage accounts.
- Configured SendGrid accounts in azure.
- Installed and Configured Windows Server 2008//2008R2/2012/2012R2
- Experience in Windows DNS, DHCP
- Server deployment on physical hardware and virtual machines, server management
- Domain controller backup and restore, DC health checks.

Capital One, Richmond, VA **Mar 2012 - Apr 2018**
Systems Engineer

- Network Support Team Member of NAOC Enterprise network
- monitoring, configuration, implementation and troubleshooting of Cisco routers and switches.
- Provided network support onshore and offshore. Generated KPI reports on all active devices on NAOC CAMPUS LAN
- Maintained Company's LAN/WAN connectivity and services between various sites and making recommendations to enhance their uptime, reliability, and performance.
- Designed Data Network infrastructure for NAOC using Visio and E-draw applications.
- Configured management of company's Cisco hardware-based network infrastructure which include Cisco routers, Switches, and wireless devices. Worked in the remote Support for End user Laptop and Desktop issue.
- Proxy configuration in End user machine
- Domain joining of Laptop and desktop to company infra.
- Troubleshot LAN and WAN issues for company users.
- Provided technical support to all Enterprise and Broad commercial customers on phone and remotely for Office365 Product & Services
- On call support, managing/ fixing production incidents, strategy planning for environments and systems.
- Troubleshot business related applications like report analyzing tool.
- Experienced in operational 24x7 support, best practice troubleshooting, monitoring, capacity planning and maintenance.
- Configured the Outlook for the client machines.

8.15 MATTHEW J.- MICROSOFT AZURE & M365 CONSULTANT

Summary

- Certified specialist in Microsoft 365 implementations and architecture including SharePoint, Microsoft Teams, Power Automate, Power Apps, Purview (security & compliance), and Azure.
- With over 20 years of IT experience, I have performed Microsoft Cloud migrations, Microsoft Cloud architecture solutioning, and hold a deep understanding of the Microsoft 365 and Azure platforms.
- I also hold a Microsoft Certified Trainer certification and enjoy adding training to both IT and end users. In addition to my awards and certifications, I also speak at events about the Microsoft Cloud and have authored two books, The SharePoint Business Analyst, and Mastering Microsoft Teams.

Professional Experience

Client: Confidential Apr 2020 - Present
Microsoft 365 Cloud Architect & Manager

- Leading Microsoft Cloud (365 & Azure) implementations at Fortune 500 companies, law firms, software companies, media conglomerates, and consulting companies
- Migration planning to the Microsoft Cloud including moving files from Box, Egnyte, Google, shared drives, and other data sources to SharePoint Online, Teams, and OneDrive for Business
- Creating and automating solutions in the Microsoft Cloud with SharePoint, SPFx, Power Apps, Power Automate, Microsoft Teams, Azure apps, Azure AD, PowerShell, and the Microsoft Graph
- Training managers, engineers, support stand, executive staff (C-suite), and end users on Microsoft Cloud technologies
- Microsoft Cloud Security including DLP, governance, compliance, sensitivity labels, AIP, auditing, and Microsoft CASB
- Conducting stakeholder meetings with management and others to conduct migration interviews and formulate requirements and technical documentation for projects.

U.S. Department of the Health and Human Services Washington D.C Jan 2019 - Apr 2020
Office 365 & Azure Architect

- Rollout of Microsoft Teams to 2,500 users in a government tenant including the decommissioning of Skype for Business
- Conversion and upgrade from classic SharePoint on-premises 2010 / 2013 to SharePoint Online using the modern SharePoint framework with Gulp / Node.js / React.js, Power Apps, Power Automate (Flow) and PowerShell
- Creation and delivery of training for the launch of Microsoft Teams across the organization

North Carolina Community College System Raleigh-Durham, North Carolina Jul 2018 - Jan 2019
SharePoint / Office 365 Architect & Developer, Microsoft Teams SME (contract)

Amgen Tampa/St. Petersburg, Florida Area Mar 2018 – Jun 2018
Microsoft Teams Deployment Architect (contract)

USPTO Alexandria, Virginia Mar 2017 - Sep 2017
Sr. SharePoint / Office 365 SME (Developer, Administrator, Business Analyst) – Contract

McDonald's Oak Brook, IL Sep 2015 - Dec 2016
SharePoint / Office 365 Developer, Designer & Business Analyst – Contract

CNO Financial Group Chicago, IL Dec 2014 - Apr2015
Sr. SharePoint Administrator, Support & Developer - Contract

JDSU Sep 2012 – Aug 2014
SharePoint Business Analyst, Admin, Developer & Technical Project Manager

Assurance, Schaumburg, IL Oct 2011 – Mar 2012
SharePoint Business Analyst, Administrator & Developer

Intertek Apr2011 - Oct 2011
Jr. SharePoint/Windows Serv Admin & Desktop Support, Admin & Dev

Microchip Technology Feb 2010 - Apr 2011
Jr. SharePoint Admin / Support & Sr. Lotus Domino Admin & Programmer (contract)

Northwestern Mutual Jan 2008 - Mar 2009
Sr. Lotus Notes Domino Programmer SharePoint Analyst (contract)

8.16 RAVI D. - CISCO, INFRASTRUCTURE & VIRTUALIZATION CONSULTANT

Summary

IT professional with over 20 years of comprehensive experience in design, support, and service introduction for enterprise-wide projects. Drive data center (compute, storage, and virtualization) projects in design, implementation, and support of customers' virtual environments. Strong analytical, troubleshooting, and technical expertise to consistently deliver productive technological solutions, working both individually and as an integral part of a team.

Skills

- **VMware:** vSphere ESXi 6.7, 6.5, 6.0, 5.x, vCenter Server, vCSA, vMotion, HA, DRS, vSphere Data Protection (VDP), P2V and V2V conversion. Update Manager, VMware View Manager 4x/5x (VDI), VM templates, SRM
- **Dell EMC:** Unity, VNX, Isilon and VNXe systems
- **Cisco:** Hyperflex, Intersight, Fabric interconnects, UCSM, UCS B-Series Blade & C-Series servers. Nexus 1000v
- **Microsoft:** Active Directory, DNS, GPO, WINS, DHCP, WSUS, SQL, clustering and NLB, SharePoint, Terminal Service, Windows Server 2008, 2012, 2016, 2019 Windows 7, 10,
- **Other:** HCI, Hyperconverged, SAN, NFS, iSCSI, FCoE , FC storage, HP Servers, Trend Micro Antivirus, Backup Exec

Professional Experience

ShoreGroup/ATSG, New York, NY **Feb 2012 – Present**
Senior Infrastructure Engineering (Data Center & Virtualization)
Lead the Data Center practice in design, implementation, and support of customers' virtual environments. This includes various solutions such as storage systems (Unity, Hyperflex, VNX, Isilon), compute with Cisco's UCS servers and VMware ESXi and vCenter as well as other technologies

- Design and implement VMware vSphere, vCenter Server & VMware View (POC) solutions
- Design, configure and deploy Dell EMC storage systems - Unity, VNX, Isilon, VNXe
- Design, configure and implement Cisco's Hyperflex systems via Cisco's Intersight
- Configure and deploy Cisco UCS B series & C series servers in various customers solutions
- Perform physical to virtual and virtual to virtual conversion of VMs
- Upgrade customers' virtual environments (compute, storage and virtualization)
- Collaborate with Dell EMC in upgrading customers Isilon systems
- Support and manage customer environments
- Collaborate with pre-sales team on designs for customer solutions

Thomson Reuters, New York, NY **Sep 2007 – Oct 2011**
Customer Solutions Architect (Engineering and Architecture)

- Role in centralized global IT department responsible for the production, delivery and support of Reuters' internal IT systems, standards and policies based on Microsoft Active Directory, Windows server platform and Windows 2003/2008/XP.
- Produce and maintain Global Virtual Desktop Infrastructure (VDI) build out for Thompson Reuters Customer Support Center in Manila, Geneva and New York. Using VMware ESX3.5 / vSphere 4.1/ VMware View 3.0/4.5 software on HP ProLiant servers and HP MSA 2000 SAN. Cluster environment with VMware HA (High Availability), DRS (Distributed Resource Scheduler) and vMotion functionalities. The VDI environments are centrally managed with vCenter servers running on Windows 2008 servers and SQL 2005.
- Support Thomson Reuters Editorial Active Directory, DHCP, WINS, DNS, GPOs, File & Print and Trend infrastructure for the Americas.

- Design and manage the hardware refresh program for the Americas.
- Manage the integration of new services and transition to support team
- Supervise the handover of support to 3rd party partner organization
- Oversee the global internal systems patch management process using both WSUS and Shavlik.
- Provide level 3 support for VMware, Active Directory, DNS, DHCP, WINS, GPOs, HP Radia and Windows platforms (server 2003/2008), both desktop and backend
- Certified Thompson Reuters Eikon software on internal systems
- Worked on mergers and acquisitions project to integrate internal standards with new companies
- Provided legacy knowledge for migration of Reuters systems to Fujitsu
- Maintained all global design, operational, maintenance and support documentation
- Tested/certified hardware for global internal user desktop/laptop devices in Thomson Reuters legacy domain

Support Technical Specialist **Feb 2000 – Aug 2007**

- Designed and implemented Active Directory/DNS/DHCP/WINS/Windows 2000/HP Radia global design and roll out as part of Microsoft/Reuters JDP
- Provide level 3 support for VMware, Active Directory, HP Radia and Windows platforms (server 2000/2003), both desktop and backend
- Produced Windows XP global build and migrated from Windows 2000, deployed Windows XP / Windows Server 2000/2003 / various applications globally
- Managed ongoing delivery of global desktop build, hardware design, security requirements and certification
- Designed and implemented new virtual thin client environment for developer center in Beijing using VMware ESX 2.x on HP servers and Sun Ray thin client.
- Supported ongoing global service improvement projects within Reuters
- Managed environment refresh at Reuters (15000+ desktop/laptops)
- Trained first and second level of new infrastructure and client builds
- Worked on mergers and acquisitions team to integrate internal standards with new companies
- Managed IP services such as DNS, DHCP and WINS for the Americas

Education/Professional Certification

- Computer Information Systems, Bachelor of Business Administration
- Baruch College/City University of New York, New York, NY
- Amazon Web Services Cloud Practitioner/pursuing AWS Technical Associate Certification EMC Technology Architect, VNX Solutions (EMCTA)
- EMC Technology Architect, Isilon Solutions (EMCTA) VMware Certified Professional: VCP 6.5, 6, 5x, VCP-DT 5 Microsoft Certified Systems Engineer MCSE, MCSA
- ITIL v3 Foundation Certificate in IT Service Management

8.17 ALUKO D. – CISCO, INFRASTRUCTURE & VIRTUALIZATION CONSULTANT

Summary

- Analytical and Award-winning IT Infrastructure Operations and Support Analyst with more than 10+ years' extensive experience twelve years of experience in IT Infrastructure management and support in a fast-paced banking industry and cloud service provider.
- Demonstrated strong expertise in managing server (windows and linux servers), storage infrastructures, virtualization, networks administration, alert and security management, data protection and disaster recovery, data-center operations in a multi-platform environment.
- Expertly oversee large-scale IT projects, business continuity, networks, and infrastructures — from initial planning and development to implementation and enhancements.
- Effective communicator with excellent leadership skills, possess strong negotiation and problem-solving skills, dependable and always willing to help others in accomplishing organization goals.
- Team Leadership, Project Management, Strategic Planning, Motivating & Developing Staff, Budgeting, Vendor Management, Contract Negotiations, Business Continuity, Change Management, Infrastructure and Operations Management.

Skills

- **Operating Systems:** Linux Red Hat, CentOS, Ubuntu, UNIX, Windows Server 2008 / 2012 / 2016 / 2019 /2022
- **Server Hardware:** Dell PowerEdge, HPE C7000 Blade Enclosure, Converged and Hyper-Converge Infrastructure.
- **Storage Hardware:** NetApp FAS 8040, & AFF 300, Hitachi, Dell, Brocade SAN Switches, HPE Robotic Tape Library
- **Virtualization:** VMware ESXi, Microsoft Hyper-V, Citrix XenApp, VMware Horizon View, Identity Manager
- **Microsoft Technologies:** SCCM, MS Exchange, Office 365, Microsoft Azure, Active Directory, Group Policy.
- **Databases:** MS SQL Server 2012 R2 / 2014 / 2016, MySQL, MS Access.
- **Network Management:** LAN, VLAN, WAN, VPN Inter-connectivity, Load Balancer, Wireless LAN and Cisco ACS
- **IT Service Management:** BMC Remedy Service desk, Manage Engine Service desk plus.
- **Backup Management:** Symantec Veritas backup, CommVault, Veeam
- **Security Management:** MacAfee DLP, Titus Data Classification, Fortinet Firewall, Network Access Control (NAC)
- **Networking Protocol:** TCP/IP, IIS, WINS, DHCP, DNS, SNMP, SMTP, NFS, FTP, SCP, SFTP, iSCSI and FC
- Programming: PowerShell scripting, Batch scripting
- **Management Tool :** Microsoft System Center Suite, VMware Site Recovery Manager, ManageEngine Op Manager
- **Remote Administration:** Putty, VNC, Terminal Service, SSH & Telnet.

Professional Experience

ThinkOn Incorporation (Wholesale Cloud Service Provider) Ontario Canada. Aug 2019 – Till Date
Senior IT Infrastructure Analyst

- Coordinates deployment of cloud, virtualization, and SAN solutions to leverage new technologies, add business value, increase efficiencies, and reduce overall IT costs to the business.
- Technical lead for the Upgrade of the VMware Infrastructure (vCenter, vCloud Director, NSX and ESXi) to provide new product features to our customers as a cloud service provider adapting to the technological advancement.

- Handles compliance and audit requirements with both internal and external auditors and ensures that company achieve excellent audit rating by putting the adequate controls in place to mitigate company risk exposure.
- Technical lead for the implementation of VMware horizon view, Unified Access Gateway with multifactor Authentication.
- Technical lead for the implementation of security controls such as Alienvault SIEM and Syslogs for central logs management of all infrastructure and networking assets.
- Manage engagement with the product management for innovation of new products with great value-add to the business growth.
- Handled the creation of Azure AD Connect for On Premise AD synchronization to Azure AD, manage Azure SSO integration for 3rd party applications.
- Technical lead for the implementation and deployment of McAfee data loss prevention with Bit-Locker Encryption.
- Administration/management of O365 user account creation E1 and E3 license allocation.
- Handled migration of O356 tenant migration from one domain to another using ADMT and ForensiT
- Ensure proper documentation for the existing and new solutions deployed in the organization including the configuration, architectural design, processes, and procedures.
- Technical lead for the upgrade of the Microsoft Active Directory and domain controllers from windows server 2012 to windows 2019.
- Responsible for the setup of TrendMicro Deep Security Manager for Anti-malware, Intrusion prevention, Web reputation, Firewall, Integrity Monitoring, Log Inspection and Application control.
- Coordinate weekly team project performance update to drive productivity and to offer aid to the team when necessary to prevent roadblocks to the project/product delivery.
- Handled capacity management and monitoring of IT Infrastructure compute resources, support infrastructure designs address the technical needs of the clients.

Standard Bank Group (Africa's biggest lender by assets with a global spread.) Aug 2010 – May 2019
Senior IT Infrastructure Manager

- Supervised the daily operations, support, and maintenance of the IT Infrastructure including network connectivity and utilization, windows and Linux server administration, virtualization, performance tuning, real time replication, backup and restores across the office branches and datacenters ensuring alignment with the business objectives.
- Instituted ITIL operations practices bringing a level of discipline to the systems operations and reducing system outages through change management.
- Worked closely with the IT Security team for the deployment of Forescout Network Access Control.
- Provided direct supervision and mentoring for a team of four full time employees with responsibilities in network management, backup administration, Microsoft Active directory, DNS, Group Policy deployment, user/group creations and permissions and ensured performance delivery in line with organization's objectives.
- Engaged the Learning and development team for personal development and IT relevant trainings for my team members
- Sustained stability and availability of the IT Infrastructure through co-location of production data center and by adhering to ITIL change and release management standards in an agile manner. Regular software patch installation, approved upgrades, server operating system patching and security updates via SCCM which contributed to an overall system stability of 99.9%.
- Developed quarterly vendor rating system to provide feedbacks to the third-party vendors based on their performances.
- Administered the management of the Citrix application virtualization farm (XENAPP) by virtualizing the Teleform OCR application for performance optimization.

- Improved overall performance of critical and high-traffic transactional systems by introducing load balancing techniques using F5 load balancer appliance to manage traffic to these on-premise systems. Application performance improved as the turnaround time to complete a transaction was reduced by more than 40%.
- Coordinated the security vulnerability and penetration testing for the external web client facing applications and ensured the implementation of recommended solutions to the findings.
- Managed and Configured Fornetix, Cisco ASA and Pfsense Firewalls, putting the right security firewall rules in place.
- Executed quarterly preventive maintenance exercise for the desktops, printers, server and storage Infrastructure.
- Implemented the setup of HPE Blade enclosure C7000 with 8 units of full height HPE Blade Servers configured with VMware ESXi 6.7, Hyper-V in cluster for high availability and resilience.
- Managed disaster recovery and business continuity plans. Anchored first unplanned disaster recovery exercise successfully
- Management and configuration of cisco catalyst switches 3750, 3850.
- Acted as escalation point for troubleshooting advanced network/systems issues;
- Implemented the upgrade of Virtual Infrastructure from VMware ESXi and vCenter 5.5 to 6.0 seamlessly without any service disruption, configured host affinity rules for resource management.
- Performed upgrade of Windows Server 2008 R2 to Windows server 2012 with minimal downtimes for 50 servers.
- Performed upgrade of MS Office 2010 to MS Office 2013 enterprise and office 365 setup on all staff systems company wide.
- Resolved all hardware system related issues logged by staff on the Remedy ticketing system. 98% of logged issues were resolved within the approved service level agreement (SLA).
- Managed and setup the installation of both physical and virtual server infrastructure in Production, development and UAT environments with over 600 virtual servers on both windows and Linux platform.
- Administered Windows Active directory, DNS, Group Policy deployment, user/group creations and permissions.

Education & Certifications

- MBA in Business Administration, Obafemi Awolowo University Ile-Ife, Osun State, Nig., Apr 2012
- (Assessed as equivalent to Canadian Executive Master of Business Administration by World Education Services, Canada)
- B.Tech. in Computer Engineering, Ladoke Akintola University of Technology, Oct 2006
- MS Azure Fundamentals
- CompTIA Security+
- VMware Cloud Provider Specialist
- VMware Certified Professional (VCP 6.5 –DCV)
- VMware NSX-T Data Center: Install, Configure, Manage [V3.0]
- Red Hat Certified System Administrator (RHCSA)
- Project Management Professional (PMP)
- NetApp Certified Data Ontap Administrator
- Certified Data Center Professional (CDCP)
- Microsoft Certified Technology Specialist (MCTS)
- Information Technology Infrastructure Library v3 (ITILv3)
- Cisco Certified Network Associate (CCNA)
- Zerto Certified Associate (ZCA)

8.18 ANIL K. - OKTA CONSULTANT

Summary

- Senior Technical Consultant in Okta Professional Services with Okta Inc for several implementations.
- Experienced in Designing and implementing Identity and Access Management Solutions.
- Worked on Integrating 300+ applications with OKTA IDM with several types of apps like SAML / Provisioning / OAuth / SWA.
- SME in implementing Okta for Workforce IAM with more than 80K users.
- Experienced in implementing and managing Okta for Consumer Identity and Access Management with more than 2 million users.
- Implemented Workday as a HR System for Okta.
- Implemented Okta integration with Amazon Webservices.
- Implemented several custom workflows for Onboarding / Offboarding / User Life cycle management trough Service Now for Okta, Using API calls.
- Implemented VPN solutions using Okta.
- Implemented SSO / Windows Authentication / Device Trust / IWA / O365 authentications.
- Worked on consumer Identity management with Okta with Social Authentications.
- Skilled in designing Access Policies according to various regulatory requirements like CIP, PCI, SOX, HIPAA.
- Implemented several complex network based and conditional multifactor authentications using Okta.
- Worked on large scale Identity management with 1 million + user base.
- Having extensive experience in Identity and Access management domain.
- Implemented Oracle Identity and Access Management product suites for clients across multiple industry domains such as Manufacturing (OIL & Gas), Insurance & Banking, Ministries and State Governments.
- Ability to Learn New Identity and Access Management tools and work on Open SSO.
- Skilled in managing and Designing Enterprise Security.
- Knowledge on Different Identity and Access Management tools like Alert Enterprise IDM, Tivoli IDM, ForgeRock, CA Identity Manger, CA Access Manger, SSO, Multifactor authentications , Ping.
- Successfully implemented Identity and Access management projects with High availability and Disaster recovery environments.
- Expert in Implementing OIM, OAM, OHS, OID, OVD, AD, OUD and web logic servers.
- Experienced in configuring the Web gates and HTTP internal and external reverse proxy servers.
- Expertise in designing the suitable architectures as per the client requirements.
- Exposure in configuring multifactor authentications with external agents like RSA, Entrust True Pass, Keypads.
- Expertise in presenting POC's, working on RFP's and designing best suitable architecture for the client requirements.
- Functional support. Reconciliation for active directory and SAP and several other external connectors,
- Handling Complex functional issues related to IDM platform, integrations, configurations and enhancements.
- Expert in implementation and Installation of Single Sign On with various Oracle products like Webcenter Sites, Portal, SOA and other components.

- Configure Approval process in the design console for provisioning into Active Directory after manager approval.
- Experienced in configuring OID / OUD to AD Integration, Password Authentications from AD for Single sign on.
- Technical expertise and experience to adopt into different roles as Support, Implementation Specialist and Tester.
- Good knowledge in Oracle Identity Management Architecture.
- Installation and Configuration of IDAM Suits 10g, 11g R1, 11g R2, 12C.

Skills

Identity and Access Management Tools	Okta Identity and Access Management. Oracle Identity Manager - 10g, 11g R1, 11g R2. Oracle Access Manager - 11g R1, 11g R2. Alert Identity and Access Management. Open SSO, Open IDAM. Open LDAP.
Application Servers	Web Logic, Tomcat, Web spear
Traffic Directors	Oracle Http Server 11.1.1.6, 11.1.1.7
Database	Oracle 9i, 10g,11g, 12C, MS Sql,
Directory servers	Oracle Internet Directory, Oracle Virtual Directory, Oracle Unified Directory OUD, MS Active Directory, Sun One Directory 5.1, Tivoli Directory Server.
Operating Systems	Solaris, Oracle Linux, HPUX, RHEL, Window server family.
Other Technologies for Integration with IDAM	Active Directory, Sap, Microsoft Exchange, Siebel Crm, Videx Cyber Lock, People Soft HRMS, HP Service Manager, Oracle E-Business User management, RSA Authentication Manager, Siebel User Management. Sample Java Applications, ADF Applications, IBM Curam, Oracle Web center Sites / Content management.

Summary of Professional Experience

- Working with A4Globaltech on implementing Okta for several clients.
- Worked with Cisco / AppDynamics as an Okta SME to Implement Okta and migrate several apps from ISIM / ISAM to Okta and Sailpoint.
- Worked with American Family Insurance as a Principal Consultant for Legacy application migrations to Okta.
- Worked with Ross Stores, San Fransisco, CA as an Identity and Access Management Practise Lead
- Worked at Rodan and Fields, San Fransisco, CA as an Okta Identity and Access Management subject matter expert (SME)
- Worked as an Identity Management Implementation Principle Consultant at Walgreens Co.
- Worked as an Identity and Access Management Consultant at Infosys, Washington DC for Department of Health & Human Services.
- Worked as Implementation Specialist for Mannai Corporation, from TechSignia. Primary area of focus has been implementing Identity Management and all other relevant components.
- Worked as Senior Software Engineer with Smart Net It Sol, Bangalore.
- On Implementation of Oracle Identity and Access manager for State of New York, United States.
- Worked with Alert Enterprise ltd as an Identity and Access Management engineer as a Specialist in implementing and Integrating IDAM with the Risk and Compliance calibrators.

Project Details

Project Name : Okta Implementation and Support.
Company : Taos.
Client : Several Clients
Duration : Jan 2022 – Current
Role : Senior Technical Consultant / SME – (Sub Contractor).

- Design and Implement Workforce Okta with Workday as a Master.
- Design Okta Implementation for external accessing Okta throughout the world in CIAM Tenant.
- Implement automated User creation and Termination.
- Implement Service now – Okta integration
- Implement several service now based workflows to automatically grant access to apps.
- Integrate Several new apps with Okta for SSO
- Support Okta tenants integrated with over 400 applications.
- Support CIAM tenants with over 1.5 Million Users.
- Okta – Snow, VPN, MobileIron and other integrations.

Company: Cedrus Co
Duration: April 2021 – Jan 2022.
Role: Senior Technical Consultant / SME – (Sub Contractor).

- Okta implementation for Orgs and Apps across the world in different regions.
- Responsible for Designing, Implementing and Documenting multi-tenant implementation.

Project Name :Okta Implementation.
Company : Okta Inc.
Client : Several Clients
Duration : Aug 2020 – Mar 2021.
Role : Senior Technical Consultant / SME – (Sub Contractor).

- Responsible for Designing and Implementing Consumer Identity and Access Management for several clients.
- Responsible for implementing different HR integrations like Workday as a master, ADP as a master, CSV as a master, UltiPro as a master etc.
- Responsible for integrating several SAML / OIDC apps with Okta.
- Responsible for End-End Okta implementation.
- Okta Identity and Access Management.
- Sailpoint Identity and Access Management
- Okta Access Gateway.
- Okta API Access Management.
- Okta Universal Directory.

Project Name: Consumer and Workforce Identity Management Implementation.
Client: Trustmark Insurance.
Duration: Jan 2020 – Dec 2020.
Role: IAM Architect / SME.

- Responsible for Designing and Implementing Consumer Identity and Access Management for over 1M consumers.
- Responsible for Designing Integration flows for over 200 application.
- Responsible for developing migration strategy from Legacy IDAM to Okta for Workforce and Consumer IDAM's.
- Responsible for Integration several OpenID / Oauth , SAML, Header based, Cookie Based, URL Authorized apps.
- Responsible Leading Identity and Access Management Implementation team of 6.

- Okta Identity and Access Management.
- Sailpoint Identity and Access Management
- Okta Access Gateway.
- Okta API Access Management.
- Okta Universal Directory.

Project Name :Application Modernization
Client : American Family Insurance.
Duration : Jan 2020 – May 2020.
Role : Principal Consultant.

- Responsible for Setting up Okta as an Enterprise SSO solution.
- Responsible for defining SSO Security parameters for the organization.
- Responsible for Migrating various internal application / Legacy applications from Sailpoint to Okta.
- Responsible for user migration to Okta.
- Responsible for Training the Support team to handle operations on Okta.
- Okta Identity and Access Management.
- Oracle Identity and Access Management
- Okta Access Gateway.
- Okta API Access Management.

Project Name : Identity and Access management
Client : Ross Stores
Duration : Jan 2019 – Jan 2020.
Role : IDM Practice Lead.

- Responsible for leading operation and Managing day-day activities at Ross Stores and responsible for development and support activities on below solutions
- Okta Identity and Access Management.
- Oracle Identity and Access Management
- Cyberark Privileged Identity Access Management
- Oracle Directory Servers
- NetSkope

Project Name : Okta Identity and Access management
Client : Vistra Energy
Duration : Feb 2019 – April 2019.
Role : Okta IDM Architect.

- Designed various app onboarding flow for the organization.
- Designed and implemented the Workday mastered integration with Okta.
- Designed and implemented Okta to People Soft Integration with GreyHellar

Implemented Tableau, Work Place integration with Okta.

Project Name : Okta Identity and Access management
Client : Rodan and Fields
Duration : Mar 2017 – Jan 2019.
Role : SME / Implementation Lead.

- Gather Requirements for implementing Identity and Access management.
- Integrate Okta with various systems like Workday / Active Directory / Box.
- Implement Single Sign On and user provisioning for over 40 different applications.
- Implement Okta Authentications on network devices like routers using Radius Server.
- Implement Password Synchronization from various directory servers.

- Implement Orchestration from Service Now to Okta and configure a request based identity management in Okta using Service Now.
- Train Service desk to support and manage Okta.
- Customize and Manage Okta as per the business requirements.
- Implement Multifactor Authentications for Secured apps.

Project Name : IDAM Implementation Consultant.
Client : Walgreens.co
Duration : Nov 2016 – Mar 2017.
Role : Design, Implementation and Administration.

- Setup high available Oracle Unified Directory for enterprise wide LDAP services for user authentications and authorization for over 400 applications.
- Migrations of user from legacy LDAP systems.
- Integrating Linux and Unix systems for authentications.
- ODSEE to OUD migration.
- Authentications and Authorization provider configuration and maintenance for enterprise wide Linux / Solaris / SUSE / AIX and various other operating systems and applications.

Project Name : Enterprise Security Management.
Client : Department of Human Services, Washington DC.
Duration : Nov 2015 – Nov 2016.
Role : Design, Implementation and Administration.

- Installation ,domain Configuration and deployment of IDM Suite and IDAM Suite for components like OIM, OID, OVD, OUD, OAM, OIF, OHS, OAAM in High availability Cluster QA and Prod environment.
- Configured OVD as an Identity Store for OAM.
- Integration of OIM with OAM for LDAP Sync and Single Sign On.
- Implemented OVD as a multi data source with OID as an External User Repository and AD as an internal user repository.
- OIM UI customizations as per the client requirements.
- Configure SSO from People Soft Directory Server users.
- Post Production Support for Prod Environment.
- Configure and support single sing on for IBM and custom Java / ADF applications.
- Configure and Support SSO for partner applications via Federation.
- SSL Certificate setup and Support.
- Session Management and Support in Oracle Adaptive Access Manager.

Project Name : Fusion Middleware Implementations.
Employer : Mannai Corporation / Techsignia Pvt Ltd.
Client : Central bank.
Duration : Dec 2014 – Oct 2015.
Role : Implementation Specialist.
Technology : Oracle IDAM, Oracle Business Intelligence, Sap Modules.

- Involved In Requirement gathering and Design Discussion.
- Involved in Designing Identity and Access management Implementation Architecture with High Availability.
- Implemented Oracle Identity Manager 11g R2, Oracle Access manager 11g R2, Oracle Internet Directory 11.1.1.7, Oracle HTTP Servers 11.1.1.7.
- Integrated Oracle Single Sign on with Various ADF Custom Applications and Different Weblogic Servers.
- Configured Authorizations and Authentications for ADF applications and Sample Applications.

- Integrated IDAM Suits with OID and Active Directory for Authentications and Authorizations.
- Implemented SSL for Native and Weblogic Applications in Oracle HTTP server and Weblogic server as well.
- Implemented Windows Native Authentications.
- Implemented OID, AD and OVD Integrations.
- Configured Development / Staging Environments.
- Presented Periodic presentation of work to the client with many presentations and demo.

Project Name : Fusion Middleware Implementations.
Employer : Mannai Corporation / Techsignia Pvt Ltd.
Client : Ministry of Municipality and Urban Planning.
Duration : Dec 2014 – Aug 2015.
Role : Implementation Specialist.
Technology : Oracle IDAM, Oracle Business Intelligence, Sap Modules.

- Involved In Requirement gathering and Design Discussion.
- Designed Identity and Access management Implementation Architecture with High Availability.
- Implemented Oracle Identity Manager 11g R2, Oracle Access manager 11g R2, Oracle Internet Directory 11.1.1.7, Oracle HTTP Servers 11.1.1.7.
- Integrated IDAM Suits with OID and Active Directory for Authentications and Authorizations
- Integrated Access manager with Oracle Soa / Portal and Oracle Webcenter Sites.
- Configured Development / Production and Disaster Recovery Environments.
- Presented Periodic presentation of work to the client with many presentations and demo.
- Installed Oracle Web Center Sites Delivery and Content Management Systems over various environments.

Project Name : Identity and Access management Implementation.
Employer : Smart Net It pvt Ltd.
Client : State Of New York.
Duration : May 2014 – Nov 2014.
Role : Installations and Configurations.
Technology : Oracle IDAM, Oracle Business Intelligence, Sap Modules.

- Involved In Requirement gathering and Scope Designing.
- Involved in Detailed discussions and Documentation for requirements.
- Involved in Designing the Architecture and implementing it with High Availability.
- Configured and Presented the POC's successfully at client location in United States.
- Deployed Oracle identity manager, Oracle Business Intelligence, Oracle Internet Directory, Oracle Access manager in Dev, Staging and Production Environments.
- Designed Work Flows for User Provisioning, De-Provisioning, Granting Access and Revoking Access.
- Integrated OBIEE with Identity and Access Management suits for report generation.
- Involved in designing custom reports as per the client requirements.
- Involved in integrating the Oracle IDAM components within and with various other connectors like SAP ISU, SAP GRC, AMT Sybex and other systems.

Project Name : FPL IDM Implementation and Product Maintenance.
Employer : Alert Enterprise pvt Ltd. / Smart Net IT pvt Ltd.
Client : Exelon Corporation.
Duration : Jan 2012 – May 2014
Role : L2 Production Support
Technology : Oracle IDAM, Sap Risk and Compliance Calibrator.

- Involved in managing user life cycle management of OIM.

- Configure various LDAP connectors like AD and OID with OIM, Cyber lock (Custom),.
- Developed different type of Access policies for On-board process.
- Developed a custom workflow for moving disable and enable user accounts to OID Target system
- Developed a workflow to fetch the data and populate those data between different Target Systems.
- Involved in develop Standard and custom resource level Approval Workflows based on SAP & Non SAP employee roles
- Involved in Trusted & Target Reconciliation for different Target Systems
- Involved in to prepare the Unit Test Script and Execution the Integration & Product Testing and bug fixing.
- Mass Upload functionality for users and mapping with these External systems.
- Running the migration script on the Database when we migrate from old to new version of application , Handling the both database oracle and SQL for migration, Drop and create the tables to update the database for new release
- Risk analysis and mitigation for the roles assigned to the user. Setup of rule engine and SAP to perform the risk analysis, analysis of roles which have risks, removal of the role from the user which create risk into system. Mitigation and remediation control activity.
- Provisioning the users into various systems issuing the passwords with defined polices and maintaining them preparing the user self password recovery polices.

Project Name : FPL IDM Implementation and Product Maintenance.
Employer : Alert Enterprise pvt Ltd. / Smart Net IT pvt Ltd.
Client : Florida Power and Light.
Duration : Jan 2012 – March 2013
Role : L2 Production Support
Technology : OIM 11gR1, Weblogic, Oracle DB 11g

- Worked on maintenance, support by solving OIM related tickets which arise day to day from client administrators on priority level basis.
- Monitoring OIM server log files to check any error for user, resource related errors.
- Monitoring Open task user issues for pending, rejection and disable states.
- Monitoring Task schedulers to trigger fixed intervals and their failures on any event.
- Verifying archived feed files after reconciliation from People soft Flat file to check for reconciled attributes in case of reconciliation errors.
- Creating users manually when requested according to the given requirements.
- Created Admin users and assigned them to ID management teams to monitor specific sub-groups.
- Created Rules, Access policy according to client requirement.
- Imported rules, Access policies, groups in sequential order from xml files supplied by script generating tool from client.
- Modified attribute mapping in GTC when there is a change required for different fields interchange.
- Worked with LDAP browser to verify changes, updates reflecting in MS Active directory
- Involved in setting up of the OIM 11g Development environment which includes OIM installations, GTC creation for Flat file, Adapter configuration for AD and Exchange.
- Modification of GTC configuration between Source, Reconciliation staging and OIM user forms.
- Worked on analysis of requirements for User provisioning to Active Directory and Sun I planet LDAP Directory.
- Creation of new user fields in OIM user forms and resource process forms.
- Created Auto-provisioning for users to AD, Exchange resource.
- Created rules and access policies for users to get resources based on attributes
- Post production support & maintenance

Project Name : Physical and logical User and Access management.

Employer : Smart Net It Solutions.
Client : Electric Reliability Council of Texas (ERCOT).
Duration : Jan 2010– Dec 2011.
Role : Support & Maintenance.

- Involved in Setting up of Development environment which includes OIM installation, Weblogic App server deployment, Connector configuration for AD and Exchange.
- Creation of Generic Technology Connector for FLATFILE.
- Reconciliation of Users from HRMS FLATFILE to Oracle Identity manager using Generic Technology Connector (GTC).
- Reconciliation of users from FLATFILE is done under schedule timings using Task Scheduled Jobs
- Extending Active Directory, Exchange server connectors in terms of UDF creation, Lookup definition and schedulers.
- Added custom attributes for both reconciliation and provisioning.
- Automated User Provisioning to the Targets using Rule, Access policy creation
- Installation and Configuration of Oracle Identity Manager 9102, Oracle 11gR1 database, Windows 2008 server on JBOSS.
- Initial Reconciliation of the existing employees from the HR Database from GTC DBAT connector.
- Automated provisioning: Newly created users are provisioned to Active Directory
- Configuring of periodic reconciliation with HRMS.
- Generating and managing operational and historical reports for OIM.

Education

- Bachelors in Technology from Jawaharlal Nehru Technological University, Hyderabad in Electronics and Communication Engineering.

Certifications

- Okta Certified Professional
- Okta Certified Administrator
- Okta Certified Consultant
- Okta Certified Developer
- Oracle WebLogic Server 12c Certified Implementation Specialist
- Oracle Identity Governance Suite 11g Certified Implementation Specialist
- Link to verify Okta Certifications:
- Step 1 : Click Here (https://www.okta.com/services/certification/verification/)
- Step 2 : Fill in the name " Anil Kumar Aileni Gadila " and search.

8.19 JAMIE A. – ODI CONSULTANT

Summary

Jamie is a Data Warehousing and ETL Development SME specializing in Oracle Data Integrator (ODI) and related technologies. Jamie is an experienced and enthusiastic consultant with nineteen (19) years of experience in data warehousing, and a track record of success across wide range of industries. She possesses exceptional interpersonal, problem-solving and analytical skills to provide advice and expertise to client organizations improving business performance. She is a detail-oriented team player with strong organizational skills, and the ability to handle multiple projects simultaneously with a high degree of accuracy.

Skills

- Oracle Database/Autonomous/OCI
- Microsoft SQL Server
- Data Warehousing
- Data Modeling
- SQL
- PL/SQL
- Unix/Linux
- Oracle Data Integrator (ODI)
- Shell Scripting
- Microsoft SSIS/SSAS
- Informatica
- Oracle OBIEE/OBIA/OAC/OAS
- Microsoft Power BI
- Python
- Github
- Jira
- Kimball Methodology
- Multitasking
- SDLC
- SaaS/Iaas/Paas
- Client relations
- Agile Methodology
- Problem solving/troubleshooting
- Collaboration and Teamwork

Professional Experience

U.S. Analytics **Aug 2021 - Dec 2022**
Principal Consultant
(Clients: American Fidelity Assurance, Commonwealth Of Massachusetts, Dxc Technologies)

- Completing implementations and enhancements for client systems based on requirements.
- Providing guidance during requirements and design sessions.
- Developed and maintained applications using the latest programming techniques.
- Designed applications and integration interfaces using recommended best practices.
- Produced and updated documentation for IT and system users.
- Providing highly expert technical support.
- Providing quality system implementations and enhancements through extensive testing and troubleshooting.
- Maintain positive working relationships with all clients.

AST LLC **Dec 2010 – Aug 2021**
Principal Consultant

- Completing implementations and enhancements for client systems based on requirements.
- Providing guidance during requirements and design sessions.
- Developed and maintained applications using the latest programming techniques.
- Designed applications and integration interfaces using recommended best practices.
- Produced and updated documentation for IT and system users.
- Providing highly expert technical support.
- Providing quality system implementations and enhancements through extensive testing and troubleshooting.
- Maintain positive working relationships with all clients.

City of Jacksonville Oct 2020 - Jul 2021
ETL Lead

- Developed complete specifications for required ETL mappings.
- Installed Oracle Data Integrator version 12c on client and Linux.
- Configured physical and local topology.
- Modeled the data structure of the target warehouse to meet specifications.
- Designed, developed ODI (Oracle Data Integrator) (Data Integration) objects for ETL Project, gathering requirement specification documents.
- Implemented data transformation strategies by using LKM, RKM, IKM, CKM and JKM Knowledge modules.
- Developed interface with custom flat file loads complete with error checking.

State of Maine Mar 2018 – Feb 2020
BI/ETL Applications Lead

- Installed and configured OAC on multiple environments (Development, Test, Production).
- Worked with SME's to identify requirements from diverse source systems into the one OAC environment.
- Designed and developed data warehouse model based on requirement utilizing Oracle best practices (tables, indexes, constraints, sequences, triggers).
- Data migration designed using multiple methods (SQL, PL/SQL, SSIS).
- Utilized PL/SQL to set up SDC's for HR process and converted history.
- Set up data level security in RPD to mask sensitive HR data from all users.
- Conducted user testing/training sessions to ensure comfortability with the new tool.

Cobham Feb 2017 - Oct 2018
BI/ETL Applications Lead

- Performed OBIEE 11g and ODI 11g migration to IaaS (Financial, HR, CRM, Procurement & Spend, Projects, Sales) using Linux across seven environments.
- Installed OBIEE and ODI 11g on Linux machines while troubleshooting any issues.
- Configured software in each environment to perform migrations.
- Applied any customizations needed throughout the process.
- Conducted all testing and remediation to ensure environments were functioning properly.

Bechtel Marine Propulsions Jan 2015 - Dec 2015
BI/DW/ELT Senior Analyst

- Installed OBIEE 11g with import of Project Analytics.
- Installed Oracle Data Integrator 11g on client and Linux.
- Configured physical and local topology.
- Worked closely with client SME's in understanding the Analytical requirements.
- Worked on ODI Designer to create customizations to mappings, procedures, packages and scenarios based on requirements.
- Used ODI Operator for viewing and debugging the execution details of interfaces and packages.
- Worked on LKM (File to sql, sql to sql), IKM (Oracle global insert, Oracle incremental update), CKM (CMK Oracle, RKM (Standard).

Acxiom Corporation Oct 2004 - Oct 2009
Solution Developer

- Home Depot DW Solution with Informatica.
- Designed and developed enhancements/customizations based on business requirements and process improvement.
- Provided support for production processes.

- Designed, enhanced, and executed ad-hoc processes.
- Maintained solution documentation for all components of the data warehouse.
- Mentored/Trained other developers on the data warehouse solution.

Motorola Inc. Oct 2004 - Oct 2009
DW/Programmer Analyst

- RNSG (Product Sales) Data Warehouse, Informatica.
- Designed and developed enhancements/customizations based on business requirements.
- Implemented a packaged data warehouse solution phasing in each business within the sector.
- Provided support of data warehouse programs in a manner that met the service level commitment.
- Represented team as quality champion to develop process improvement standards.
- Ensured data integrity through quality checks and user feedback.
- Interacted with various IT groups to continuously enhance the process for customers.
- Designed, created, maintained and updated technical documentation.

Education

- Northern Illinois University, Bachelor Of Science In Information Systems, 2005-2008

Professional Skills

- Dependable with track record of success in field, attention to detail and proactive mindset.
- Seeks opportunities to improve processes and workflows for team benefit.
- Conscientious, hardworking and excels at multitasking in fast-paced environments.
- Motivated individual with business acumen and willingness to take on challenging roles.
- Tech-savvy and quick learning with technical know-how.
- Hardworking employee with customer service, multitasking and time management abilities.
- Devoted to giving every customer a positive and memorable experience.
- Dependable team member trained in register operations and customer service.
- Contributes to smooth front-end operations and goes beyond requirements to handle customer needs.
- Reliable, team-oriented, and efficiently completes assignments.

8.20 SURESH V. – DATA WAREHOUSE ARCHITECT

Summary

- Around 16+ years of experience in business analysis, data architecture, database design and data modelling in various business intelligence, data warehouse, operational and data integration projects.
- Strong fundamentals and experience in architecture, design, development, implementation, and project Management primarily on enterprise data warehousing and business intelligence solutions.
- Extensive experience in architecting and designing data integration workflows.
- Experience in creating complex conceptual, logical, and physical data models using Erwin and MS Visio
- Implemented interactive dashboards, canned and ad-hoc reports using various BI tools.
- Strong experience with different SDLC methodologies like waterfall and Agile.
- Hands on experience in metadata modeling, MDM projects and a technocrat with expertise in systems design, implementation, and testing.
- Expertise in ETL design and integrating data from disparate source systems and diverse data formats.
- Experienced in end-to-end data flow in an enterprise environment, data movement/transformation/ integration, metadata, reference data management, information assurance/security.
- Familiar with NoSQL databases, Amazon AWS, Hadoop technologies
- Familiar with SOA, XML, Data Flow Diagrams, UML Data Modeling and EAI technologies
- Experience serving industrial segments like Finance, HR, Sales and Marketing, M]ufacturing, O2C, P2P.
- Extensive experience in writing and tuning SQL queries, PL/SQL stored procedures, functions, and packages.
- Implemented BI on Premise to Cloud, Cloud to On Premise, Cloud to Cloud models.

Skill

- **ETL/BI Tools:** Tableau, Looker, OBIEE, Informatica, ODI, Matillion, Fivetran
- **Databases:** Oracle, SQL Server, Teradata, Exadata, Hbase, MongoDB, Cassandra, RedShift, Snowflake
- **Data Modeling:** Erwin, Data Modeling OLAP/OLTP, Star, Snowflake, MDM, MS Visio, Lucid Charts.
- **Data Analysis:** Data Cleansing, Profiling, Data Integrity and Quality Standards, KPI's, Audits, System analysis
- **Big Data:** Apache Hadoop; Spark, Map Reduce, Yarn, Hive, Pig, Sqoop, Flume, Kafka, Storm, Oozie, ZooKeeper, Mahout, Ambari
- **Languages:** Java/JEE, C, C++, Python, R, Scala, SQL, and PL/SQL

Professional Experience

Century Link / Lumen, Broomfield, CO **Feb 2019 – Present**
Data Architect / Data Warehouse Architect / Data Modeler-Analyst / BI Consultant

- Conceived, designed, developed, and implemented the data warehouse solution from scratch to build Subscription Data Model and ARR engine which in turn fulfils SaaS Metrics required for FinBI, Level 1 and Level 2 teams.
- Involved in client interfacing and cross functional infrastructure teams in requirements gathering, analysing the system architecture and translate them into architectural design in integrating SFDC and Invoicing environments.
- Designed and defined data integrations, data pipelines & semantic models based on business requirements.
- Lead ETL architecture and provided strategy related to data cleansing, data quality & data consolidation.

- Created conceptual, logical & physical models for operational systems and dimensional models for data warehouse project.
- Designed flow & process diagram and did gap analyses to enhance existing and future state systems.
- Documented high level architecture, physical components, requirements and TDD of the project.
- **Environment:** Tableau, Informatica, Data Modelling, Data Lake, EDW, SFDC, SQL Server, Oracle

Charter Communications. NC **Apr 2016 – Jan 2019**
Data Architect / Data Warehouse Architect / Data Modeler-Analyst / BI Consultant

- Created conceptual, logical & physical models for operational systems and dimensional models for data warehouse projects.
- Created operational data store for Charter Commission Engine.
- Designed and defined data integrations, ETL workflows & semantic models based on business requirements.
- Review work inventory, effort estimates & schedule for each project and keep track of milestones.
- Responsible for managing onsite-offshore analytics team.
- Responsible for validating business requirements.
- Contributed as techno functional expertise to meet business needs.
- Conducted meetings and design sessions with Business Users, Analysts from OLTP and OLAP.
- Documented the technical architecture, physical components, requirements, and delivery of the components.
- Involved in client interfacing and cross functional infrastructure teams in analysing the system architecture and translate them into architectural design documents and involved in requirements gathering.
- Implemented Data Lake to avoid users access to production applications and enable self-service BI capabilities.
- **Environment:** Informatica, SQL, PL/SQL, Data Modelling, Teradata, Data Lake, Hadoop Echo system, Tableau.

Macy's Inc. GA **Sep 2014 – Mar 2016**
Data Architect / Data Warehouse Architect / Data Modeler-Analyst / BI Consultant

- Architect, design and build Enterprise Data Warehouse architecture utilizing best practices.
- Developed conceptual, logical, and physical data model using Erwin.
- Developed data lineage and business glossary for Data Warehouse.
- Created operational data store for accounting and financial reporting systems.
- Analyse business requirements and convert them into technical design document.
- Design, and document complex processes that consolidate and integrate data.
- Establish best practices and architecture for data integration workflows.
- Supported all teams including ETL, BA's and testing team in DW implementation.
- Provide technical knowledge, project management and leadership to implement the solution.
- Participate in daily scrum, provide product demo to product owners and senior stakeholders.
- Responsible for all activities related to the development, implementation, administration, and support of ETL.
- **Environment:** OBIEE, ODI, Informatica, SQL, PL/SQL, Oracle, Dimensional/Data Modeling, EDW, ODS.

Yankee Candle Company / CSS-US, MA **Aug 2013 – Jul 2014**
Data Warehouse Architect / BI Architect

- Conducted meetings and Design sessions with Business Users, Analysts from OLTP and OLAP.
- Documented the technical architecture, physical components, requirements, and delivery of the components.

- Configured BI APPS 11.1.1.7/8 (ODI/ETL, Configuration/Functional Setup Manger and OBIEE/RPD/Reports/Dashboards) on distributed environment and implemented Oracle out of the box Prebuilt Analytics.
- Defined Data Standards, Guidelines and Best Practices.
- Defined frameworks for Operational data system.
- Customization and validation of all the OOB Dashboards: Financial and Supply Chain Analytics dashboards against Oracle EBS Source System.
- Involved in client interfacing and cross functional infrastructure teams in analysing the system architecture and translate them into architectural design documents and involved in requirements gathering.
- Review work inventory, effort estimates & schedule for the project and keep track of milestones.
- Responsible for all activities related to the Implementation, administration, and support of ETL ODI processes including customization of Prebuilt (OOB) Applications.
- Integrated and implemented MDM, business intelligence (BI) and data warehousing (EDW) solutions.
- Standardized processes to create an accurate and single view of customers across multiple channels.
- **Environment:** OBIEE, ODI, Oracle EBS R12, SQL, PL/SQL, Oracle 11g, Dimensional Modeling, MDM.

GE Appliances /FCS-TEKsystems, KY **Jun 2012 - Jul 2013**
DW / BI Architect

- Responsible for managing onsite-offshore analytics team and helping them with – design, build, validation.
- Defined Data Architecture and Data Conversion / Migration strategies.
- Created and implemented Dimensional Modeling to support various Data Warehouse initiatives.
- Designed ETL Architecture and lead ETL Team.
- Conducted meetings and Design sessions with Business Users, Analysts from OLTP and OLAP.
- Review Work inventory, effort estimates & schedule for each project and keep track of milestones.
- Documented the technical architecture, physical components, requirements, and delivery of the components.
- Configured OBIA (Informatica/ETL, DAC and OBIEE/RPD/Reports/Dashboards) on distributed environment and implemented Oracle out of the box Prebuilt Analytics.
- Defined Data Standards, Guidelines and Best Practices.
- Customization and validation of all the OOB Dashboards: Financial, Manufacturing, Procurement and Spend, Supply Chain and Project Analytics dashboards against Oracle EBS Source System.
- Involved in client interfacing and cross functional infrastructure teams in analysing the system architecture and translate them into architectural design documents and involved in requirements gathering.
- Responsible for all activities related to the development, implementation, administration, and support of ETL Informatica–DAC processes including customization of Prebuilt (OOB) Applications.
- **Environment:** OBIEE 11g, OBIA 7.9.6.3, OBAW, Informatica 9.0.1, DAC 10g, Oracle EBS R12, Web Logic Server, UNIX, SQL, PL/SQL, Oracle 11g, Dimensional Modeling.

Michelin / Cap Gemini, SC **Jul 2011 - May 2012**
Sr. DW/BI Solution Lead

- Involved in client interfacing and cross functional infrastructure teams in analysing the system architecture and translate them into architectural design documents and involved in requirements gathering.

- Customization and validation of all the OOB Dashboards: General Ledger, Payables, Procurement and Spend, Supply Chain and Project Analytics dashboards against Oracle EBS Source System.
- Conducted meetings and Design sessions with Business Users, Analysts from OLTP and OLAP.
- Documented the technical architecture, physical components, requirements, and delivery of the components.
- Configured OBIA (Informatica/ETL, DAC and OBIEE/RPD/Reports/Dashboards) on distributed environment and implemented Oracle out of the box Prebuilt Analytics.
- Designed ETL Architecture and lead ETL Team.
- Created Conceptual, Logical and Physical Data Models.
- Defined Data Standards, Guidelines and Best Practices.
- Responsible for all activities related to the development, implementation, administration, and support of ETL Informatica–DAC processes including customization of Prebuilt (OOB) Applications.
- **Environment:** OBIEE 11g, OBIA 7.9.6.3, OBAW, Informatica 9.0.1, DAC 10g, Oracle EBS R12, Web Logic Server, UNIX, SQL, PL/SQL, Oracle 11g, Windows 2003 Server.

PGCPS, MD **Jul 2008 - Jun 2011**
DW/BI Solution Lead

- Developed custom applications for school system using Oracle APEX (Application Express).
- Conversion of custom oracle discoverer reports in BI environment and working with BI-XML Publisher reports for Purchase Orders and configured Data Bursting to email & print.
- Worked on Oracle Data Integrator (ODI) as a custom Data warehouse development for student's information system data.
- Involved in client interfacing and cross functional infrastructure teams in analyzing the system architecture and translate them into architectural design documents and involved in requirements gathering.
- Created Conceptual, Logical and Physical Data Models.
- Conducted meetings and Design sessions with Business Users, Analysts from OLTP and OLAP.
- Defined Data Standards, Guidelines and Best Practices.
- Documented the technical architecture, physical components, requirements, and delivery of the components.
- Configured OBIA (Informatica/ETL, DAC and OBIEE/RPD/Reports/Dashboards) on distributed environment and implemented Oracle out of the box Prebuilt Analytics.
- Designed ETL Architecture and lead ETL Team.
- Responsible for all activities related to the development, implementation, administration, and support of ETL Informatica–DAC processes including customization of Prebuilt (OOB) Applications.
- **Environment:** OBIEE 11g/OBIEE 10.1.3.4.1, OBIA 7.9.6.1, OBAW, Informatica 8.6.1, DAC 10.1.3.4.1, Oracle EBS R12\11i, WebLogic Server, RCU, Oracle 11g/10g/9i, Windows 2003 Server, ODI 11g/10g, Toad, APEX 3.x/4.0.2, XML/BI Publisher, Discoverer 10g, UNIX, SQL, PL/SQL, SQL Loader.

DMV, FL **Sep 2006 – Jun 2008**
Oracle Developer

- Coordinate with the team to gather the requirements and delivery of the components.
- Documented the technical development, physical components, requirements, and delivery of the components.
- Responsible for all activities related to the development, implementation, administration, and support of ETL process via PL/SQL.
- Developed, modified, and maintained complex PL/SQL stored procedures.

- Performance Tuned complex SQL's.
- Develop proof of concept.
- **Environment:** SQL, PL/SQL, Oracle, SQL Developer, Performance Tuning.

InfoTech, India **Jun 2004 - Aug 2006**
ETL Developer

- Understand the Functional business processes and requirements given by the Business Users and involved in Designing High level Technical Documentation based on specification.
- Designed and creation of fact and dimension tables and logical/physical data models based on specifications.
- Developed Mappings to populate data marts using Informatica Power mart designer and used debugger to evaluate ETL timings and optimized SQL in mappings and mappings by using Aggregator, filter, Joiner, Expression, Lookups
- Involved in Unit Testing, Integration Testing and System Testing and created UNIX shell scripts to automate batch jobs and debugging the Mappings, which were raised by QA at testing environment.
- Worked on to check out the Source to Target Mappings related to the Issues and modified, by analyzing data flow, evaluating various Transformations and created mapplets which provides reusability in mappings.
- Involve in enhancements and maintenance activities of the data warehouse including performance tuning. Designed workflows, sessions with assignment task, event wait, and event raise tasks, used Informatica scheduler to schedule jobs.
- **Environment:** Informatica Power Center 7.1.1/6.2, PL/SQL, Oracle 9i, SQL Server 2000, Windows 2000.

Education

- Bachelor of Engineering in Computer Science and Engineering, Madras University, India.
- Master's in advanced computer networks, Glasgow Caledonian University, Scotland, UK.

8.21 DILIP D. – ORACLE FUSION CONSULTANT

Summary

- Oracle Payroll Cloud Certified Implementation Specialist
- Oracle Global Human Resources Implementation Specialist
- Good expertise in Fusion HCM offerings- Core HR, Benefits, OTL, Absence management, Compensation Management, Talent Management, Payroll management, Profile Management, Time and Labor, Security, FBL, HCM extracts, HCM data loader (HDL), BI publisher and OTBI Reports.
- Extensively worked on Implementation planning, fit/gap analysis, conference room pilots, configuration, testing, training, rollout, and post-implementation support of Oracle Fusion HCM Cloud/SaaS solutions at various customer sites.
- Involved in Complete lifecycle implementations involving Data allotment, Requirements gathering, Business Process Re-engineering, Configuration, Development, Troubleshooting, Training, and production support environment.
- Experience in full life-cycle Payroll management, implementation of Global HR R12 and upgrades of the Oracle E-Business Suite from 11i to R12.
- Good experience in implementation, development and configuration of Core HR, Goal Management, Talent Review modules and Oracle EBS Application 11i.
- Experienced in Managing HR data Request and assemble, analyze, and format data into useable reports.
- Solutions-oriented, innovative, and highly motivated Oracle HR Functional Implementation consultant with a proven track record of having successfully completed full cycle implementations of Oracle Applications, with experience in providing Oracle Functional solutions and support for major ERP projects.
- Proficient with exporting all work structures, employees, External Candidates, and users from Global HR to Taleo recruiting.
- Excel in interacting with the project team members responsible for developing reports, interfaces, data conversion programs, and application extensions and able to lead discussions during business requirement meetings.
- Experienced in configuring Workflow routing rules for all Manager Self-services and Employee Self-services.
- Gained a wealth of experience through all stages of project management, system development, functional implementation, support, and custom development.
- Conducted business process analysis as an effort to align information technology solutions with business initiatives of multiple Oracle ERP applications 11i to R12 knowledge and understanding of accounting concepts.
- Working experience in both client/server and web-based environment.
- Experienced in creating HCM extracts and delivery options for extracts.
- Good experience in creating Reports and Analytics using Oracle Cloud BI.
- Strong understanding of Fast Formulas.
- Trained in Oracle Fusion HCM and Talent Management Implementations.
- Excellent ability to learn and deliver in a very short period and can work on multiple projects and excellent communications skills.

Skill

- **Applications:** Oracle Fusion HCM 11g, R9, R10 and R11, ERP Oracle Applications R12 12.2.5/12.2.4, 11i (11.5.8/11.5.9/11.5.10) (EBS), Accounts Payable, Purchasing, HR, Oracle Time labor, Payroll, Accounts Reversible, Self Service Human Resource, Advanced Pricing, Shipping.

- **Database:** Oracle 11g/10g/9i, DB2
- **Languages:** SQL, PL/SQL, C, C++, XML, UNIX Shell Scripting, HTML.
- **Tools:** Rational Requisite Pro, VISIO, Balsamiq. Oracle Applications R11i, Oracle 9i, Developer 9i/6i, Forms 9i and Reports, Workflow Builder. Oracle Business Accelerator, Toad, Office Suite (Excel, Word, Project, PowerPoint, FrontPage, Publisher, Visio), File Based Loader, Spreadsheet Data Loader, ORACLE/ ERP.
- Full Cycle Implementations of Core HR, Learning, Benefits, Compensation and Payroll Modules
- Expertise in Data Conversions
- Multiple inbound and outbound Integrations
- Expertise Dashboards, Graphs and Analytical Reports
- Expertise in OTBI & OBIEE Reports development.

Professional Experience

Application Software Technologies, TX Jan 2020 – Present
Oracle Fusion HCM
Sr. Oracle Fusion Principal consultant
Clients

- SCL Health
- Health Partners
- Charter County Public Schools
- Denver Public Schools
- City of Jacksonville
- Montgomery County Public Schools
- Capital Metropolitan Transportation Authority
- Complete end to end implementation of Core HR, OTL, Benefits, Compensation and Payroll for multiple public sector clients.
- Developed multiple OTBI and BI Reports as per client's requirement.
- Developed Multiple Fast Formulas for Core HR, OTL and Compensation.
- Developed internal tool to accelerate data conversion and migration.
- Developed PLSQL scripts for Data migration accelerator tool.
- Handled data validations and Error reporting via accelerator tool and HDL.
- Expertise in HDL, Spreadsheet data loader and Payroll batch loader.
- Expertise in Data Conversions for Core HR, Benefits, Compensation and Payroll.
- Developed several e-text templates, complex reports, and data models as per the requirements set by the Human Resource, Payroll and Benefits departments.
- Handled Inbound and Outbound Integrations.
- Developed multiple Test scripts to test custom roles.
- Created multiple custom roles based on security concerns and requirement.
- Conducted multiple sessions and proficient in requirement gatherings.
- Handled multiple clients during implementation.
- Worked along offshore and onshore teams in different time zones very comfortably.

Pearson, Raleigh, NC May 2018 – Dec 2019
Oracle Fusion HCM R12, R13
Oracle Fusion Techno Functional Lead consultant

- Involved with HRIS team for Oracle development requirements gathering and providing optimal solutions for the issues raised.
- Fast Formula development for OTL, Absence and HR for Notifications.

- Driven requirements gathering sessions and document requirements. Based on the analysis, designed, and implemented HCM Solutions that are apt for the business model.
- Developed reports to generate emails to all the manager level employees to notify them regarding goal plan management by developing Oracle Business Intelligence Data model and various reports with HTML template.
- Developed custom schedulers in Oracle HCM to deliver reports and emails Bi-Weekly and every day to all Managers and specified third party systems.
- Developed Benefits interfaces from Oracle HCM to ADP system by gathering requirements from Benefits team and ADP team utilizing Oracle HCM tools like OTBI and Oracle Extracts.
- Developed several e-text templates, complex reports, and data models as per the requirements set by the Human Resource, Payroll and Benefits departments.
- Developed extracts for outbound integrations for payroll and Benefits.
- Created documentation for all the interfaces and Integrations for Benefits and Payroll.
- Conducted meetings with the client to gather the requirements and utilize the expertise to design the solutions for Benefits, Learning, Compensation and Payroll.
- Worked on Data Conversion Validations from legacy System to Fusion System.
- Designed and authored specification documents and worked on USA, UK, Brazil, Australia and Canada Payroll Interfaces from Fusion HCM cloud to ADP.
- Designed and developed HCM Extracts for generating employee benefit details interface to third party vendors.
- Extensively worked on and supported SIT (Systems Integration Testing) and UAT (User Acceptance Testing) and resolved bugs identified on priority basis.
- Involved in page customizations.
- Developed SQL fast formulas needed as extract rule for costing details and payroll of the assignment for HCM Extracts. Extensively worked on Fast Formulas related to Benefits and Payroll Modules.
- Performed design and development of conversion of Payroll Objects (Banks, Bank Branches, External Bank Accounts, Personal Payment Methods, Element Entries and Calculation Cards) from legacy systems to HCM cloud using PBL and HDL.
- Worked on Assignment Corrections, Cancel Relationships and Termination of Assignments using HDL and PBL loaders in Fusion.
- Developed Inbound integration from legacy systems to fusion through PBL and HDL.

Blue Apron, New York, NY **Jan 2018 – May 2018**
Oracle Fusion HCM R12, R13
Oracle Fusion Technical Lead

- Developed Benefits interfaces from Oracle HCM to ADP system by gathering requirements from Benefits team and ADP team in which complete design and development of the Interface using Oracle HCM tools like Oracle Business Intelligence and Oracle Extracts is required.
- Involved in meetings with ADP to understand their requirements related to HR demographic information and other Tax related issues which are required for development and modification of outbound from Oracle HCM and TALEO on-boarding tool using TALEO Connect Client (TCC) in Amazon webservices server.
- Developed an Interface to bring out TALEO on-boarding system data to Oracle HCM system on everyday basis which brings in all the candidates who are hired through TALEO using TCC data bridge and Oracle HCM Data loader.
- Developed an Interface between TALEO and ADP system to transfer Tax and Direct deposit data daily in which SQL and java are used to create and schedule the interface using TCC.

- Fixed the issues in the production environment related to missing data or wrong data generation in reports and extract used for interface and integrations by debugging the issue and modify their data mappings, data models, extract definitions, templates, Backend report SQL.
- Created Test cases and Test Scripts to test all the reports, interfaces and Integrations developed.
- Collaborated with business and development representatives to identify key feature characteristics and develop test strategy and design tests to validate that intended data/analytic operations are functioning properly.
- Designed and reviewed Test scenarios and test automation scripts.
- Detailed problem analysis for identified issues using the log details and code base to provide more accurate defect report to development.

Oracle Consulting Services, Memphis, TN May 2017 – Feb 2018
Oracle Fusion HCM R11, R12
Oracle Fusion Techno Functional Lead

- Gathered business requirements and utilized expertise in Oracle HCM for designing solutions.
- Developed complete end to end Automated Coexistence Integration System cycle between EBS and Fusion to Integrate Work structures as part of Core HR, OTL and Workforce Compensation Modules calling Webservices.
- Created Packages required for Integrating EBS with Fusion.
- Created Packages required for Inbound Interface from Third-Party Onboarding systems to Fusion.
- Configured Third Party (NeoGov) onboarding system Inbound Interface to get in New Hire data.
- Developed project management plans, manage tight deadlines, and coordination of project team activities, defining and agreeing on deliverable and milestones.
- Developed various complex RTF templates for generating the compensation change statements for multiple plans and provided documentation.
- Worked on outbound Interface to EBS Servers to send Worker, Assignment, and salary data.
- Involved in Data Conversion of Worker and Work Structures from EBS to Fusion Application.
- Involved in complete documentation for Integration and Interfaces.
- Configured outbound Interfaces with EBS and Third Party (NeoGov) Onboarding system to send HR, Department and Job Data (Work Structures).
- Developed HCM Extracts required for outbound Interfaces.
- Created Fast Formulas to revert Division Name, FLSA status, Grade Step EFF Date, Grade, Grade Ladder, Proration factor and Bargaining Unit.
- Involved in developing Reports in Oracle Fusion HCM.
- Worked on Data Conversion from EBS System to Fusion System.
- Developed Test scripts for SIT and UAT and involved in testing phase with client.
- Involved in developing cut over plan and provided inputs required from the technical point.
- Developed Design document for all the integrations and interfaces.

ACI Worldwide Inc., Omaha, NE (Remote) Feb 2017 – May 2017
Oracle Fusion HCM R11, R12
Oracle HCM Reporting Specialist

- Gathered business requirements and utilizing expertise in Oracle HCM for designing solutions.
- Developed Reports in Oracle Fusion HCM working closely with HRIS users eliciting and addressing main points.
- Responsible for designing and creating new reports, authoring documentation, troubleshoot issues and fix them.
- Assist with creating folder structure and security.
- Developed Goals, Compensation, Financial, Talent and Absence Reports.
- Configured Manager Dashboards and Human Resource Dashboards.

- Trained HRIS Team on Reports Development with detailed documentation.
- Developed SQL queries to develop reports and troubleshoot data issues.
- Worked with oracle support to resolve various issues and provide production support activities.
- Responsible for establishing and adhering to the projects communication plan and complying with all reporting requirements.
- Identified user training needs and devising user training programs.

Xerox Business Services LLC, Germantown, MD Dec 2015 - Jan 2017
Oracle Fusion HCM R10, R11
Oracle Fusion HCM Functional Consultant

- Reviewed Business requirements to be a part of the FUD (Functional Upgrade Doc) and FDD (Functional Design Doc).
- Involved in the Functional uptake discussion, which involves not only the impact of a functionality on the product, but also the various changes associated with it. These sessions also include the various areas which has to be changed to cater to these 'functionality' changes.
- Setup/Enhancement of benefit program offered by employer.
- Setup geographies, action reasons, content types, enhanced Fusion flex fields, jobs and departments etc.
- Proficient in preparing E-Text template & RTF file formats for Absence, Core-HR & Talent modules.
- Setup Fusion Talent management sections like Goal plans, Questionnaire, Performance scale, Appraisal template and performance document.
- Designed and developed scripts to load and extract data using HCM Extract and HCM Data Loader.
- Worked on UNIX shell scripts to transfer files Between Taleo and Fusion application using Middleware.
- Designed and developed outbound interfaces for third party vendors.
- Developed and documented OTBI reports for benefits and Talent management.
- Writing Fusion reports for performance, goals, benefits and global compensation.
- Wrote Fusion fast formulas for Benefit enrollment validation like post edit election.
- Setup HCM Cloud security profiles, role mapping and role provisioning.
- Setup Fusion Compensation plans, budget a, worksheet, Total Compensation Statement, and budget sheet customization.
- Involved in preparation of Test Cases, Test Scripts for the Global HR, Benefits, Talent and Global Compensation.
- Involved in User Interface functional testing.

Li Destri Foods Inc., Rochester, NY Jan 2015 – Nov 2015
Oracle EBS R12.1.3
Oracle EBS HRMS Consultant

- Supported and supervised the functional and technical teams that support Oracle HRMS to make sure that the HR systems are being supported properly and propose both functional and technical solutions to resolve issues raised by the system users.
- Implemented Oracle HRMS, Payroll, Self-services and OLM.
- Worked on Core HR, Payroll, SSHR, Oracle Learning Management (OLM), Approval Management Engine (AME) and System Administrator.
- Data upload through Interface tables / SQL Loader and Using APIs.
- Wrote and amended in Fast Formulas for smooth monthly Payroll Processing.
- Delivered Training / end user in Knowledge Transfer Sessions related UAT & PROD.
- Resolved day to day functional and technical issues.
- Raised SR's and handle till the end with the Oracle Customer Support.

- Defined the different payroll elements and wrote Fast Formulas to calculate the different element values.
- Maintained Oracle HRMS Self Service AME Workflows and defined the approval path of notifications, in addition to defined notification rules.
- Registered the customized forms, reports, and PL/SQL procedures in order to use them inside the HRMS.
- Reviewed functional design, created the technical specifications, developed code, unit and integration testing and user acceptance testing.
- Interfaced internal IT and business users for problem resolution and system enhancements.
- Trained technical applications users to ensure the correct and proper use the systems.
- Upgrade Process from 11 to 12.1.3 for Core HR, Payroll, and Self Services.
- Implemented Oracle Learning Management (OLM) After Upgrade Done
- Carried out Payroll processes and solved the payroll problems that have been raised during the monthly payroll run, Also Update Payroll Elements to be met with New Site Requirements.
- Designed and developed technical solutions for HRMS including interfaces, API's, scripts, forms customization and reports development to support the change in business processes.

GE Health Care, Barrington, IL **Aug 2014 – Dec 2014**
Oracle Fusion HCM Release 8, R9
Oracle HCM Functional Process Analyst (Modules: Global HR, Compensation and Fusion Benefits)

- Handled couple of Benefits interfaces for transferring the data to third-party systems.
- Analyzed complex cross functional business processes and defines integrated requirements.
- Configuring Oracle Fusion Global HR using FSM.
- Managed Enterprise Structure and Work Structures.
- Configured and managing Benefits plans.
- Configured Workflow routing rules for all Employee Self Service actions and Manager Self Service actions.
- Successfully implemented and Supported 2012 & 2013 Benefits Open Enrollment projects (Benefit Plan Rate changes & Contribution Limit Changes and Testing) for Advanced Energy employees.
- Configured Enterprise structure and Personnel Structures.
- Configured the Salary groups, Contribution rules, First and Second Programming Groups for ESPP enrollment.
- Handled the three major data migration uploads in AE which include 2011, 2012 Employee's Salaries, Appraisal's, Recurring and Additional payments.
- Helped and supported new HR end users, to maintain the employee's information effectively in Oracle HCM Cloud application.
- Facilitated Workshops for Business Requirement gathering and UAT.
- Smoke tested Global HR, Benefits applications after the Patch/ Upgrades.
- Developed test scenarios to ensure thorough testing and reviewing all test scripts developed by IT to ensure accuracy.
- Developed, managed/monitored project plans, and provide guidance to team, resolve problems and feed back to management.

Education

- PhD in Information System, University of the Cumberlands, Kentucky. US
- Master's in information technology, University of the Cumberlands, Kentucky. US
- Master's in computer information systems, California University of Management and Sciences, California. US
- Bachelor of Technology in Computer Science and Engineering, Jawaharlal Nehru Technological University, Hyderabad, India.

8.22 RHONDA S. - ORACLE SOA BPM CONSULTANT

Summary

- **Total IT:** Ten years (12+) of Total IT experience in Oracle FMW, ADF, BPM, JAVA/J2EE & Oracle E-Business Suite, SIEBEL CRM on premise Technologies (SOA 10g, 11g, 12C, OSB, AIA, BAM, Web Logic, BPEL, B2B, Mediator, ESB, JAVA, and Oracle Applications11i & R12).
- **Oracle SOA:** Seven years (9+) of Experience in Oracle FMW Technologies (SOA 10g, 11g, 12C, OSB, BPM, BPEL, Mediator, AIA, ESB and BAM) Successfully completed SOA Projects using SOA Framework with Oracle Fusion Middleware Components like BPEL /OSB/ ESB /Mediator /AIA and Web Services Manager.
- Expertise in analysis, design and development of enterprise applications using SOA, BPM, ADF, BPEL, Java, J2EE, and Database technologies.
- Designed and developed the application using Oracle ADF, JDeveloper 10g, 11g and 12c.
- Expert in designing and developing ADF, SOA composites using SOA components such as BPEL, Mediator, Human Workflow, Oracle B2B, WSDL, BAM, Web center, Oracle JCA Adapters and Oracle Business Rules.
- Experience in design, development of UIs using ADF with BPM for business process design and development.
- Expertise in installing, configuring, administering, and troubleshooting WebLogic domains, clusters and servers in distributed environments for SOA and J2EE platforms.
- Strong Experience in Migrating Projects from Oracle SOA Suite 11g to Oracle SOA Suite 12C.
- Solid understanding in Service-Oriented Architecture and its related technologies like BPEL, Web Services, WSDL, SOAP, XML, XSD, XSLT and Web Service Security (OWSM).
- Expert at working with Oracle SOA Suite SCA composites and components like BPEL process, Mediator, Business Rules, Human Workflow, and activities like Assign, Invoke, Pick, Receive, Switch, Flow, Java embedding, Email, Wait, While, Validate etc. in J-Developer.
- Experienced using the following SOA Suite technology adapters for integration with Oracle ERP and external/legacy systems: Database, JMS, B2B, FTP/File Web Service, BAM, and Oracle applications.
- Expertise in the design, development and integration of BPEL events with Sensors & Oracle Business Activity Monitoring (BAM) to create dashboards with various types of graphs.
- Experienced in designing and building robust and fault-tolerant Fusion Middleware components in BPEL and OSB using the Oracle Fault Management Framework and catch/compensate activities.
- Worked extensively in developing and deploying BPEL Processes using technology adapters (File Adapter, FTP Adapter, Oracle Apps Adapter, BAM Adapter, Database Adapter, AQ Adapter and JMS Adapter).
- Experience with handling various faults in BPEL using Error Handling and Fault Management Framework.
- Java, JNDI, JDBC, Connection Factories, Queues, Topics and Data Sources.
- Expertise on Development IDEs like J-Developer, Eclipse, Net Beans and Toad.
- Development of Oracle Fusion Applications using JDeveloper, Oracle ADF Development (ADF, ADF Faces, ADF Task Flows and Business Components) with Web Services.
- Experience with Oracle ADF Business Components, Web services ADF faces ADF Task flows and Data Controls and integration external ADF application into Fusion middleware

Skills

Development Tools / Middleware tools	J-Developer, Eclipse, Net Beans, Oracle SOA (BPEL, BPM, MEDIATOR, HW, BR), BAM, OSB.
Programming Languages	Java, BPEL, Java Scripting, SQL, C, C++, PL/SQL.
ERP	E-Business Suite Oracle Applications11i & R12, SIEBEL.
DBMS	Oracle 9i/10g/11g/12C.
XML & Web Services	XML, XSD, SOAP, REST, WSDL, UDDI, XSLT and XQUERY.
Operating Systems	Unix, Windows 95/98/2000/XP, Linux.
Oracle Applications	Oracle Applications11i & R12.
Operating System	Unix, Windows 95/98/2000/XP, Linux.
Databases	Oracle 11g,10g, 9i, 8.x, MySQL, SQL Server, MS Access
Oracle Tools	SQL*Plus, SQL*Loader, Developer (Forms 6i/4.5, Reports 6i/4.5), TOAD, SQL Developer and Discoverer
Domain Knowledge	Order Management (OM), Purchasing (PO), Account Receivables (AR), Account Payables (AP), General Ledger (GL), and Oracle Inventory (INV), Enterprise Asset Management(eAM)

Professional Experience

Office of Attorney General, Albany, NY **Dec 2018 – Current**
Sr. Oracle SOA/BPM/ADF Developer

This project proposes a unified business portal for regulated entities to conduct business with the Office of the Attorney General consistent with current trends and best practices in statewide enterprise system development for licensing and registration activities. Collection of digitized information will improve processes, transparency and access to information by the public and internal staff through improved search and display capabilities. The Charities registration process will be built in Oracle using various components such as Content, Portal, Policy Automation, BPM, ADF and SOA, to provide the workflow to submit the required information as shown on the current CHAR410 form and related registration attachments to the Charities Bureau via a web portal.

- Involved part of design and requirement gathering from business, creating process flow diagrams, creating detailed functional documents, giving presentations to the client to get the sign off etc.
- Performed necessary code reviews and testing reviews for all interfaces developed using Oracle SOA Suite.
- Experience in handling the deployment activities to move code from Development to Pre-Prod environment.
- Involved in working with ADF faces components and Layouts to implement the user interface.
- Design and implement User Interface and application business logic layer using JSF, ADF Faces and ADF Task Flows and ADF BC4J technologies.
- Used the various error handling features of SOA Suite 12c like Fault Management Framework, catch/catch-all branches, compensating transaction etc. to achieve robust error handling.
- Worked in Production Support Skills for the BPM Environment and BPM Installation, Configuration, Support and Troubleshooting including Process Center, Process Server and Deployment manager.
- Redesigned the BPM Process and implemented to automate the process and improve the Database growth.
- Developed the SOAP/REST based Web Services by using Oracle SOA BPM 12c products such as BPEL, BPM, OSB, Adapters - DB, JMS, File, FTP integrating with applications like Oracle.
- Creating XSLT transformation files, XQuery files, XPath, building and modifying WSDL, XML, JSON & XSD (schema) based on the requirements, fault handing and fallback mechanism, design and

development of integration flows based on the service contract with the end applications like Oracle, Web center and File net.
- Implementing Security for the Web Services by Using OWSM Functionality in Oracle SOA to secure web services.
- Developing PL/SQL Packages in Oracle to integrate with Oracle SOA 12c with Oracle Database.
- Designed/Architected the Business Work flow using Tasks, Events and Gateways BPMN2.0 notation, Web service identification and orchestration, application integration with legacy system.
- Designed and developed Proxy services, Business services, and Message flows at OSB layer.
- Used OSB Proxy service to invoke Java/EJB application and use Java call out in OSB to integrate Java classes.
- Implemented User Tasks, Business Rules Tasks, Service Tasks, Web Forms and ADF Forms in BPM.
- Developed ADF Business Components like Entity Objects, View Objects and Application Modules.
- **Environment:** Oracle SOA Suite 12C/Oracle Service BUS 12C, Web Logic Server, REST Adapter, DB Adapter, JMS Adapter, File and FTP.

TracFone, Miami, FL **Jan 2018 – Nov 2018**
Sr. Oracle SOA Developer
Loyalty Rewards Program offers customers various ways to earn points to receive incentive offerings.

Benefit to the customer is accessing to save up to $100 a month on local discounts + additional soft perks and to receive a FREE month of service when they show loyalty to the brand. LRP will be offered for the following brands: SM, N10, TW. Customers can earn points by refilling every month, staying longer, and engaging with the brand. Accumulating these points, customers can redeem: Data Add-ons, Phone Upgrades, Service plans.

- I involved part of design of the above projects by creating process flow diagrams, requirement gathering, creating detailed functional documents, giving presentations to the client to get the sign off etc.
- Developing and implement technical frameworks such as Error Handling, Logging, Monitoring and Audit and Notification framework.
- Designed/Architected the Business Work flow using Tasks, Events and Gateways BPMN2.0 notation, Web service identification and orchestration, application integration with legacy system.
- Designed and developed Proxy services, Business services, and Message flows at OSB layer.
- Used OSB Proxy service to invoke Java/EJB application and use Java call out in OSB to integrate Java classes.
- Integrate and orchestrate EBS Adapter to connect to AP Module and push the message Mainframe webservice and update Pool DB schema table.
- Use iREP (integration Repository) to discover the PLSQL apis for the AP and PO and exposed as rest services with json payload.
- Designed and developed the BPEL Entity and Enterprise services using DB adapter, File adapter and Mediator and exposed as a rest endpoint.
- Providing customer support for business-critical application problems and issues.
- Fixed several issues related to migration. Modified different components like JMS adapter, FTP adapter, SAP adapter, JNDI properties, OSB projects, Email Transport and made it work with 12c environment.
- Designed and developed generic error handling interface with email notifications and human work flows.
- Used MDS to share common assets like XSD, WSDL, Fault Policies and DVM etc.

- Assisted offshore team management, work assignment, coordination, status update and issue resolutions
- Designed, developed, deployed, managed and tuned asynchronous/synchronous, batch/real-time and long/short running SOA Patterns in OSB and BPEL processes using adapters (File/FTP and DB), partner links (WSDLs), process activities (Assign, While, Human Task, Java Embedding, Receive) and BPEL expressions.
- Developed several business and proxy services in OSB, used OSB security features, routing and message enrichments.
- Worked with BRM team to develop Web services to interact with BRM system.
- Worked with Data Power Team to Convert REST Format to SOAP.
- Worked on configuration plans in SOA and OSB to deploy composites in different environments.
- **Environment:** Oracle SOA Suite 12C, BRM, Data Power, BPM, ADF, Oracle WebLogic Server, Oracle Database, Java, Soap UI.

Select Comfort, Plymouth, MN **Aug 2016 – Dec 2017**
Sr. Oracle SOA/OSB Developer
Select Comfort is a U.S.-based manufacturer that manufactures the Sleep Number and Comfort ire beds as well as foundations and bedding accessories. The company is based in Plymouth, Minnesota, a suburb of Minneapolis. Purpose of this project is integrating the Sales Orders which are placed from SIEBEL to SLEEPIQ Labs App and Oracle EBS.

- Worked with Technical, Functional, Business Liaisons and Users in design and development of Web Services.
- Implemented REST Web Services in OSB to Interact with Third Party API's to Insert/Delete/Update/Get Data from Those Systems.
- Integrated with Business Applications like Oracle EBS and Oracle Seibel UCM with Third party Systems.
- Worked on SVN Repository tool to maintain the code for Versioning.
- Developed OSB proxy services and exposed them as JMS, HTTP and REST based services for consumers.
- Migrated Oracle SOA 11g composites like BPEL and OSB composites to Oracle SOA 12c.
- Implemented Oracle SOA 12c Web Services by using REST adapter.
- Work with File Adapter, Database Adapter, AQ Adapter, JMS Adapter and Oracle Applications Adapter for establishing connection with services in BPEL.
- Built BPEL processes that subscribe to various EBS events around sales order processing functionality and participate in database and JMS transactions. Used the various activities available in BPEL to perform transformations and write business logic.
- Error handling was also done for handling the faults in BPEL Processes. Business faults were handled using the catch, catchall, throw, compensation and compensation handler activities.
- The database MDS repository was used to store all the common artifacts between composites like DVM, XSD, Fault policy and Fault Binding files. Abstract WSDL's were also stored here and any call to a composite through a BPEL is made through abstract WSDL in-order to avoid dependencies problems during server start-ups.
- **Environment:** Oracle SOA Suite11g,12C, Sales Force, BAM, Oracle EBS, Seibel CRM, Oracle J-Developer, Java, REST and SQL server.

BNY Mellon, Brooklyn, NY **Feb 2016 – Jul 2016**
Sr. Oracle SOA/OSB Developer
A core function of Gennie Mae's business is the process for Issuers to submit pool and loan data to be assembled and issued as a Ginnie Mae Mortgage-Backed Security (MBS). This process is currently initiated by Issuers utilizing the GinnieNET application to electronically submit required information. Pool

and loan data is currently submitted through the use of flat files or manual data entry; however, Ginnie Mae seeks to align with the mortgage industry for submission of its pool and loan data. Accordingly, Ginnie Mae has identified an opportunity to move towards a standardized, industry-accepted format for data submission, focusing on its single and multi-family at issuance pool delivery data.

- Worked on Service enhancements for Oracle SOA Suite 12C Projects and resolved code inconsistencies during upgrade like JCA validations and deployment validations
- Designed and developed SOA and OSB Web Services by using Oracle SOA Suite 12C.
- Created different BPEL composites to Publish/Subscribe to both queues and topics.
- Implemented the OWSM Policies in OSB and SOA for User Name token and Password.
- Implemented Sensors in BPEL Process to track the sensor value in EM Console.
- Implemented Business Rules and Human Workflow in the BPEL Process to Reprocess the Messages.
- Worked on Complex XSLT, XSD, WSDL, Xpath, XQuery and canonical model.
- Worked on Creating Data Sources, JNDI Names for DB adapter.
- Worked on Creating JMS Queues, Topics, JMS Servers, Connection Factories, Sub Deployments, Work Managers, Persistent Stores and JNDI names in Web logic Server.
- Worked with the adapters like DB, JMS, File in Proxy and Business Services in OSB.
- Implemented Split-Join for performance in OSB to Process Large Volume of Messages Parallel.
- Implemented Message Reports, Alerts and Error Handling in OSB.
- Implemented BPEL processes that contain exception handling to capture the Remote Fault, Binding Fault and Catch All faults.
- Implemented Business Rules and Human Workflow in the BPEL Process to Reprocess the Messages.
- Worked on Config plans in SOA and Customization files in OSB to Deploy Projects to higher Environments.
- Worked on MDS Repository to use the common artifacts like Fault Policies, XSD's, WSDL's and Canonical Schemas in BPEL Process.
- **Environment:** Oracle SOA Suite12c, OSB, Web Logic, JAVA, BR, HWF, J-Developer 12c, .NET Framework.

AICPA, Durham, NC **Apr 2015 – Jan 2016**
Oracle SOA Tech lead

Founded in 1887, the AICPA represents the CPA profession nationally regarding rule-making and standard-setting, and serves as an advocate before legislative bodies, public interest groups and other professional organizations. The AICPA develops standards for audits of private companies and other services by CPAs; provides educational guidance materials to its members; develops and grades the Uniform CPA Examination; and monitors and enforces compliance with the profession's technical and ethical standards.

- Developed business logic process flow and user interface solution.
- Worked with Technical, Functional, Business Liaisons and Users in design and development of Web Services.
- Worked on Adapters like JMS, DB, AQ, Oracle Apps, REST, BAM, FTP and File in SOA and OSB.
- Design, development and deployment of Web Services was done using Oracle BPEL, JAVA, and XML (WSDLs)Created a Human Task in BPEL, defined users, worked on Notification Services.
- Implemented BPEL processes that contain exception handling to capture the Remote Fault, Binding Fault and Catch All faults.
- Built BPEL processes that subscribe to various EBS Business events and participate in database and JMS transactions. Used the various activities available in BPEL to perform transformations.

- Created different BPEL composites to Publish/Subscribe to both queues and topics.
- Implemented error handling at Stage level and Proxy level to handle business exceptions and faults, and published them to error reporting tables using Publish action and Reply action.
- Developed PL/SQL Packages in Oracle Apps to Call the API's from Oracle SOA to create the Orders in EBS.
- Perform testing, tuning, and configuration of Middleware products including WebLogic, and Oracle SOA
- Developed REST/SOAP Web services and exposed as JSON Objects to UI.
- Expertise in Oracle Service Bus Service Interactions like service management, message brokering, configuration framework, security and transport layer, and messaging protocols.
- Implemented Sensors in BPEL Process to track the sensor value in EM Console.
- Worked on SVN Repository tool to maintain the code for Versioning.
- The database MDS repository was used to store all the common artifacts between composites like DVM, XSD, WSDL, Fault policy and Fault Binding files.
- Developed complex schemas and XSLT transformations in BPEL to read, enhance and process incoming data and map to external provider web service (Provider OSB).
- Implemented schema validation at OSB proxy level using Validate action and reported back error to client.
- Developed services using Conditional Based Routing, Dynamic Routing and Routing tables to route messages to provider services.
- Worked on Creating Data Sources, JNDI's in order to configure DB Adapter in Web Logic Server.
- Worked on Creating JMS Queues, Topics, JMS Servers, Connection Factories, Sub Deployments, Work Managers, Persistent Stores and JNDI names in Web logic Server.
- Worked on Jenkins, Config plans and Customization files in SOA and OSB to Deploy Projects from Dev Environment to higher Environments like UAT and PROD.
- **Environment:** SOA 11g, SOA 12C, BAM, Oracle 11g, JAVA, JMS, XML, XSD, XSLT, XPath, Web Services, SoapUI, Net Forum, SQL Server, Oracle Applications R12, J-Developer 12c.

Subaru of America, Cherry Hill, NJ **Jun 2014 – Mar 2015**
Sr. Oracle SOA Developer

Project Description

Subaru of America, Inc. (commonly known as SOA), based in Cherry Hill, NJ, is the United States-based distributor of Subaru's brand vehicles, a subsidiary of Fuji Heavy Industries of Japan. The company markets and distributes Subaru Symmetrical All-Wheel Drive vehicles, parts and accessories through a network with approximately 600 dealers throughout the United States.

- Worked with Technical, Functional Team and Users in design and development of Web Services.
- Prepared MD070 Technical Documents based on MD050 Functional Document.
- Developed the Interfaces between the systems like CSOD Cloud, Siebel and Oracle E-Business Suite.
- Implemented Business Rules and Human Workflow in the BPEL Process to Reprocess the Messages.
- Worked on Adapters like JMS, DB, Oracle Apps, FTP and File.
- Developed BPM process integrate human task and Business rules and other activities and gateways.
- Integrated Task Query and Task Services for human task in Work list application.
- Developed the Spring service layer integrate with Enterprise services and process services.

- Involved in design of SOA roadmap, SOA governance, SOA Security, Enforcing SOA best practices, BPM deployment strategies.
- Developed the Canonical Data Model (CDM) and develop the major implementation of BPM work flow with Human Task integrate with GMEP (Web center) portal.
- Contributed in the sprint planning session and involve in story writing in the agile development.
- Implemented the requirement from BA and Prepared System Design spec. for the project.
- Involved in unit testing, integration testing and regression testing of the application.
- Implemented BPEL processes that contain exception handling to capture the Remote Fault, Binding Fault and Catch All faults and implemented Fault Management Frame work.
- Error handling was also done for handling the faults in BPEL Processes. Business faults were handled using the catch, catchall, throw, compensation and compensation handler activities. The system faults were handled by defining fault-policies in the fault management framework.
- Created different BPEL composites to subscribe the messages from both queues and topics.
- Implemented the OWSM Policies in OSB and SOA for User Name token and Password.
- Implemented Sensors in BPEL Process to track the sensor value in EM Console.
- Implemented Split-Join for performance in OSB to Process Large Volume of request messages in Parallel.
- Implemented Message Reports, Alerts and Error Handling in OSB at stage and main level.
- Worked on SVN Repository tool to maintain the code for Versioning.
- Worked on Creating JMS Queues, Topics, JMS Servers, Connection Factories, Sub Deployments, Work Managers, Persistent Stores and JNDI names in Web logic Server.
- Worked with the adapters like DB, JMS, File in Proxy and Business Services in OSB.
- Implemented BAM Reports for reporting and analyzing the real time Data.
- Worked on Config plans in SOA and Customization files in OSB to Deploy Projects to higher Environments.
- **Environment:** SOA 11g, OSB 11g, Oracle 11g, Web logic 10g, Oracle SOA 12C, JMS, XML, XSD, XSLT, XPath, Web Services, JAVA, SoapUI, Oracle Applications R12, Siebel, Cloud, J-Developer 11.1.1.7.0, J-Developer 12C.

American Tire Distributors, Charlotte, NC **Jul 2012 – May 2014**
Sr. Oracle SOA/OSB Developer

Since 1935 American Tire Distributors has supported the nation's tire dealers, service repair shops, and automotive performance shops with prompt and convenient delivery of the products, tools, and programs they need to service a country on the move. Oracle SOA is chosen as Middleware platform to integrate between Oracle EBS and Clients.

- Worked with Business Analyst's to identify Functional requirements in Order2Cash and AR modules and arrive at a technical solution.
- Worked on Web Logic Server Creating Messaging Bridges, Data Sources, JNDI's and Connection Pools.
- Automating and Designing the Business process, which includes Ordering, cancellation (RMA), Invoice etc.
- Designed a BPEL Process to validate, transform and process the device order using Web Service end points.
- Designed and implemented java Web Services on coherence cache to retrieve the data and send back to ATD front end portal and these web services are in OSB.
- Worked on listening to Business Events in Oracle EBS using Oracle Apps Adapter and updating Coherence Cache by implementing the BPEL processes.
- Expertise in using PL/SQL API's, Open Interfaces and custom coding of PL/SQL Packages and using them within the BPEL using Oracle Applications Adapter.

- Designed and implemented integration with external fulfillment services like FedEx, Road net etc.
- Design and implemented Proxy Services using OSB and Responsible for unit testing the integration middleware solutions using the Oracle SOA Suite EM console and SoapUI.
- Created complex XSLT and XQuery Transformations in SOA and OSB for transformations.
- Implemented the Oracle Service Bus for virtualizing some of the services and is also used for load-balancing between the servers.
- Ant scripts and configuration plans were used to move the code between the various development, test and production environments as part of the development life cycle.
- Used different JCA adapters in both OSB and BPEL composites.
- **Environment:** SOA11g, OSB, Coherence, Oracle 9i, Web logic 10g, JAVA, J2EE, ADF, JMS, XML, XSD, XQuery, XSLT, XPath, SoapUI and Oracle apps 11i.

Wind Mobile **Jun 2011 – Jun 2012**
Oracle SOA Developer
Wind Mobile has undertaken a new Reverse Logistics procurement initiative, project will assist in designing and implementing a solution to manage their return and repair processes (i.e. Reverse Logistics processes).

- Design and implemented Business Processes using Oracle BPEL PM, J-Developer.
- Involved in design and development of BPEL processes that contain Human Workflow.
- Developed BPEL processes that contain Exception Handling to capture the Remote and Binding Faults.
- Developed different Web Services using WSDL, XSD, XPATH and XSLT in the BPEL Process.
- Implemented the database connectivity using JDBC with Oracle 9i database as backend.
- Involved in the development of Tables, Indexes, Stored procedures, Database Triggers and Functions.
- Gathering business requirements and transforming them in to Functional and Technical design documents.
- Prepared Module Design Documents (MD 70) based on Functional Requirements.
- Implemented the database connectivity using JDBC with Oracle 9i database as backend.
- Involved in the development of Tables, Indexes, Stored procedures, Database Triggers and Functions.
- Developed different BPEL process (Synchronous and Asynchronous).
- Management Expertise in using PL/SQL API's, Open Interfaces and custom coding of PL/SQL Packages and using them within the BPEL using Oracle Applications Adapter.
- Provide test and production support during the development and post development phases.
- **Environment:** SOA 10g, Oracle 9i, Web logic 10g, JAVA, J2EE, JMS, XML, XSD, XSLT, XPath, Web Services, SoapUI.

8.23 MILCIADES S. – DESKTOP & MOBILE DEVICE MANAGEMENT CONSULTANT

Summary

Currently a Mobility Cloud Engineer and Consultant with a background in mobile application support and cloud infrastructure for multi-enterprise mobility solutions looking to join a reputable organization bringing determination, drive, and innovation to evolve within the growing cloud security industry. AirWatch, EPM, MobileIron, JAMF Certified Professional. Microsoft Certified Systems Engineer (MCSE), Cisco Certified Network Administrator (CCNA), Oracle Database Administrator (ODBA) and A+/N+ Certified Technician. My background and previous job experience blends Information Technology, Customer Service, and a training background. Twenty-One years of experience in the IT/IS industry, with proficiency in Mobile Device Management across multiple platforms along with training and support.

Professional Experience

Harvard Maintenance **Mar 2015 – Present**
Mobile Device Management Lead

- Offering the proven ability to devise, implement and manage a mobile operations environment and MDM program, while juggling systems administration and Service Desk Duties for a 3000+ employee environment.
- Experience crafting operating procedures, managing hundreds of employee-owned devices, and overseeing third-party service providers, resulting in a highly scalable and secure mobile infrastructure through AirWatch, MobileIron and MS Intune.
- Planned, developed, installed, configured, supported, and optimized our mobile infrastructure.
- IT Administrator providing comprehensive technical support to Executive end-users from our Leadership Team throughout the United States.
- Successful in installing, upgrading, and configuring innovative applications on Windows operating systems and providing technical support to optimize workflows and minimize business interruptions. Support involving 90% phone or VC communication with End Users.

Syncreon **Jun 2013 - Mar 2015**
Regional Technical Support Lead

- Providing 2nd level IT support for global IT.
- Manage of the Infrastructure Team in charge on Mobile Implementations at customer sites (IOS/Android) using multiple MDM solutions (AirWatch/MobileIron/JAMF)
- Assist in change management planning and originate, establish, and administer standards, policies, and procedures. Implement strategies for integrating disparate operating systems and participate in network infrastructure and desktop standards selection and engineering. Quantify and develop business case proposals for new technologies.
- Lead for installation and configuration of new servers and systems providing control, planning and direction to 2nd and 1st level support.
- Analyze the requirements for architecture changes and make recommendations to IT Management. Evaluate existing server and storage architecture for vulnerabilities, failure point and introduce improvements to system performance.
- IT lead for various projects ranging from new business implementations to internal IT Enhancements and system implementation controlling the solution, costs, and timelines.
- Carry out work and implement standards as established by the System and Network Engineering Teams in regard to planning and supporting the plants in the areas of Desktop, WAN, LAN , Servers, and Disaster Recovery.
- Provide second level diagnostic support for the System and Network Engineering Teams and the Service Desk in supporting the plants as it relates to; Desktops, WAN, LAN, and Servers.

- Captures site specific network, server, and end device documentation.
- Creates / updates work instructions for new tasks or as the steps for existing tasks are modified.
- Provides change management support during the weekend when on call.

New Jersey Manufacturers Insurance Companies Jun 2012 - Feb 2013
SCCM Support Engineer

- Windows XP/7 Project Management Team (Operations)
- Global Multi-lingual User Interface (MUI)
- PowerShell/Windows Management Instrumentation (WMI) Query
- Systems Center Configuration Manager (SCCM) OS Deployment (Windows 7/Office 2010)
- Microsoft Application Virtualization (App-V) / Microsoft Enterprise Desktop Virtualization
- Remediation of Applications for Compatibility with Windows 7
- Hardware/Software break fix/implementation
- Documentation and Training Materials Development
- End User Training
- HP OpenView/OnBase ticket assignment
- HP Printer firmware/hardware refreshes
- PC Inventory control/disposal
- Imaging Altiris/SCCM
- SharePoint documentation of issues and procedures
- Remote Desktop Support

Cadbury/Kraft Foods Oct 2005 – Mar 2012
Technical Systems Analyst II

- Ensured customer satisfaction by providing remote technical support using OCS/Citrix bt/VMware/SCCM.
- Lead Hardware/Software Implementation Specialist (Break Fix/Environment rollouts) Lenovo/HP Service. Global WIM Alpha/Beta/Final image builds for XP/W7 developer (WSUS/SCCM)
- Trainer, mentor, manager of 40 contractors which became the Tier I Support Team in Mexico (Cadbury Helpdesk). Web security activities and planning through our EPO and third-party solution and the Enterprise/Individual level. Executive Site Services VIP Support.
- Windows 2008 Server builds/patching. Remedy/Oracle/SAP Database creation/ customization/testing (ALPHA)
- Maintenance and tape server backups/rotations for our current HP Servers (EMC Solutions)
- Monitoring and reporting on bandwidth traffic and network logistics for our Cisco routers/switches (IOS). Administration of in-house Video Conference Equipment (Cisco/Avaya)
- iPhone/Android/Blackberry (BES) support/troubleshooting.
- Corporate liaison with the application stack for support issues on our Sensory, Packaging and 3D modeling application/equipment on our Science and (Technology Site.
- Scripting of several major applications for a more efficient SMS/XenApps delivery (SAP, Colligo, JDA)
- Catastrophic Recovery (virus/hard drive cluster level)
- Inventory Control and Disposal.
- Multifunction Device Administration (Xerox/Ricoh)
- Wizard/IQ Bar representative addressing end user IT related issues once a week at one-on-one level.
- Active Directory/Exchange/Lotus Notes Account Management.

Intel Corporation Oct 2002 - Jul 2005
CHAMP Supply Chain Analyst

- Marketing Support for our Supply Chain for high-end Intel-based PCs/Servers.
- Collecting inventory and sales out data for research
- Answering questions on Intel's branded products like Video conferencing packages, Anypoint™ Home Networking products.
- Training Retail Salespeople (RSPs) on new products, reinforcing marketing messages making allies
- Maintaining merchandising and demo presence- Refreshing POP and keeping demos running properly on systems.

Telvista May 2002 - Dec 2003
Helpdesk Analyst Lead

- Serving as the second point of contact for resolution of desktop/workgroup-related problems in a fast paced (100-120 calls/day) environment for the Dial-A -Tech CompUSA technical support cards.
- Troubleshooting, researching, diagnosing, documenting, and resolving technical issues surrounding Windows OS (98, ME, 2000, XP), MS Office, e-mail, Internet connections, and hardware/peripherals and products families expanding word processors (Lotus Notes), photo editing software (Corel Draw), other OS MAC and Linux), etc.

Intel Corporation Sep 2000 - Nov 2001
Technical Support Engineer

- VPN/RAS Resolution Engineer- First line of contact for the Land Rover RAS and Net structure VPN families.
- Troubleshooting and preventing client's network intrusions, ensuring data and system integrity based on information provided by their IT team.
- Installing and maintaining Net structure VPN administrative tools and clients.

Education

- Yokohama City University in Mathematical Methods of Information Security, Cryptologic Studies, 1998 - 1999
- Bachelor of Computer Science from Universidad APEC, 1995 - 1997

Certifications

- Microsoft Endpoint Manager
- Microsoft Corporation
- AirWatch Enterprise Mobility Professional
- AirWatch
- MobileIron Solutions Architect
- MobileIron
- MCSE+I
- Sylvan Prometrics
- Oracle Certified Professional D.B.A.
- Sylvan Prometrics
- Novell Netware C.N.A
- Sylvan Prometrics
- CompTIA A+
- Sylvan Prometrics
- CompTIA N+
- Sylvan Prometrics
- Cisco Certified Network Associate CCNA
- Sylvan Prometrics
- Avaya Certified Associate (ACA)
- Avaya
- Oracle Database 11g Administrator
- Oracle Corporation License

Languages

- English (Full professional proficiency)
- Spanish (Native or bilingual proficiency)
- French (Limited working proficiency)
- Japanese (Elementary proficiency)

8.24 PRASAD V. – ENTERPRISE ARCHITECT & SALESFORCE CONSULTANT

Summary

Senior enterprise architect, and technology leader with over 22+ years of professional consulting experience. Managed, designed and delivered enterprise solutions for several Fortune 500 companies in finance, automobile, manufacturing, insurance, healthcare and retail industry sectors. Held senior management and CTO level roles at Big Four consulting companies. Led and architected Salesforce and AWS multi-tenant, serverless microservices architecture-based product development for large corporations with onshore and offshore development teams.

Strong experience in product roadmap, assessment of current state architecture, product planning and future state design architectures. Managed full lifecycle management of product development including assessing business requirements, solution blueprinting, feature prioritization and MVP / final product development and production rollout. With strong communication skills worked extensively with business and technical teams in developing business process flows, KPIs, and enhanced user experience (UI/UX) as part of product development management.

Provided consulting services for clients in the areas of Salesforce, AWS Cloud Computing, Data & Master Data Management, Business Intelligence (BI), Analytics, Robotic Process Automation (RPA), ChatGPT / OpenAI and Machine Learning modeling integrations, Oracle ERP and SAP & S4/HANA, Hyperion and Cloud Enterprise Performance Management (EPM) and ERP data integrations.

Provided executive leadership for complex data management, finance transformation, reporting and compliance initiatives at global scale consistent with clients' strategic direction. Strong experience in Microservices architecture and development of RESTful APIs. Has deep knowledge in popular modern programming languages. Directed standards-based methodologies for coding, development, quality assurance, and production implementations. Assembled highly effective on-shore and off-shore delivery teams in India, China, and Mexico.

Skills

Designed and implemented in the following enterprise solutions / tools / technologies:

Salesforce: Solution and data blueprinting, Architecture, Lighting Development. Apex Development: RESTful API Integration.

Microservices Architecture: Architectural Design Pattern adoption, monolith application architecture decomposition, RESTful API with Java (JAX-RS) using Jersey and Java Spring Boot.

Programming & Application Development:

Strong programming experience in: Salesforce Apex, Python, JavaScript VB.Net, Visual Basic, Excel and Office VBA, Java/J2EE, Spring Boot, HTML, PHP

AWS Cloud: EC2, S3, API Gateway, Serverless Lambda, Step Functions, RDS, IAM, Route 53, Cloud Front, Amplify. AWS Certified Solutions Architect Associate

RPA Platforms:

UiPath, Development of UiPath RPA based Data Parsing Engine based on VB.Net and JavaScript, Automation Anywhere

Enterprise Performance Management (EPM) & Analytics: Cloud Platforms: FCCS / TRCS / EPBCS; On-Prem: HFM / HTP / HPCM / Essbase, Authoring VBA rules / ONESOURCE Tax Provision.

ERP: S4/HANA, SAP Fiori, SAP ECC, SAP Fixed Asset Module, SAP Analysis for Office (AO), Oracle, JD Edwards, Workday

ETL and Data Architecture: Data integration and harmonization. Usage of ETL tools: FDMEE / Data Management (Oracle Cloud) / Alteryx / Talend.

ERP Data Integrations & Transformation:

Mulesoft Salesforce design and integration, SAP, Oracle and JD Edwards - Record-to-Report finance transformation, Tax Data Hub/Lake implementation to address Compliance Audits.

Artificial Intelligence & Machine Learning: Python, OpenAI ChatGPT & Large Language Models & Whisper APIs, Google Teachable Machine, Google Tensor Flow, etc.

Professional Experience

TEKSystems / Ford Motor Company Sep 2020 – Nov 2022
Enterprise Architect

- As an Enterprise Architect at Ford Motor Company, developed architecture for migrating legacy Lead Management CRM solutions including Microsoft Dynamics to Salesforce for Europe region. Developed integration architectures for near-term and long-term for Ford internal systems as part of the migration strategy including MuleSoft and Kafka integrations.
- Developed migrations strategy and roadmap for a number of legacy applications in Europe to the newly adopted Ford's Enterprise Data and Infrastructure Standards incorporating Google Cloud Platform (GCP) and Salesforce Cloud Platforms. Led the architecture for migrating monolith architecture to modular streamlined Microservices Architecture for two large internal applications related to lead management (FBMS and GBMS).
- Developed RESTful API based architecture integrating QR Code technology for FordPass mobile application check-in and dashboarding to facilitate streamlined the service intake process for ~3000 dealer locations in European region.

Alorasoft Inc, TX Mar 2019 – Sep 2020 | Nov 2022 – Present
Enterprise Architect / CTO

- **Riveron / NTT Data - Enterprise Architect** – Led the initiative for improving the current architecture in the Salesforce Service Cloud based Case Management solution at NTT Data. Developed LWC components and lighting Flows as part of the POC for process improvements. Led initiative for improving current process flow and reducing substantial inefficiencies currently existing with sales teams and offshore quote processing teams. Also provided mobile development strategy for process improvements.
- **Salesforce Marketplace Partnership -** Salesforce Product Development: This product is being developed on the Salesforce infrastructure/platform and it includes the functionality of Performance Management and Bench Marking Predictive Analytics in Finance based on AI / ML and UiPath RPA AI capabilities. The Partner Application enables Customers with capabilities such as Dashboarding of KPIs and AI based Large Language Model Processing (integrating to OpenAI models & ChatGPT etc.). The Application architecture leverages Mulesoft, Microservices, RESTful APIs and the platforms such as Google Cloud Platform, Tensor Flow, Kafka, AWS, Heroku, Python, UiPath RPA, VB.NET, AWS, and Heroku etc.
- **Hanscom Air Force Base -** RPA Based Intelligent Visitor FBI Background Check Automation: Designed and developed a new intelligent application for FBI background checks At Hanscom Air Force Base visitor and cargo entrances to replace highly manual process. Overall processing time was reduced from average 12 minutes per visitor to 35 seconds which saved substantial time for processing around 100+ visitors per day. This new system architecture involved in developing a highly modular Parsing Engine in JavaScript and UiPath & VB.Net based Robotic Process Automation (RPA). This architecture had to address the complexity associated with diverse 2-D barcode (PDF417) data formats associated with 50 different States and 9 different versions of AAMVA Driver's standards-based License Data Specifications.
- **Mid-size Bank -** TRCS Implementation: As part of finance transformation and implementation of new Oracle ERP, led the Tax Reporting Cloud Service (TRCS) implementation for the client and prepare provision at Market and Legal Entity levels. Helped the Tax Department with migrating their current Excel based Provision preparation to automated TRCS Provision preparation. Modeled very comprehensive TRCS based provision in Excel bringing their data from their old Provision models bringing exhaustive list of Temps, Perms, Tax Credits etc. to be automated. Designed integrations between Oracle ERP and TRCS via Oracle Data Management (DM). Helped integrate TRCS with Fixed Asset module to bring Tax depreciation data and designed automated process.

- **Home Depot** – S4/HANA Migration Tax Consulting Engagement: As part of S4/HANA migration, helped the client as a liaison between Tax team and SAP implementation vendor. Led the initiative for data enablement of Tax relevant data from S4/HANA by leveraging SAP Fiori and Analysis for Office (AO). This initiative helped reduce the reliance on disconnected Tax data imported into Excel Templates. Facilitated accessing data directly from S4/HANA for Trial Balance, Sales and Use Tax Payable related data. Analyzed the current implementation of SAP ECC Fixed Asset system for Tax. Analyzed various Fixed Asset solution providers in the Tax market place and provided roadmap and best practices-based approach for implementation.

PwC Tax LLP, TX **Feb 2016 – Feb 2019**
Director / CTO / Enterprise Architect

- Built a RESTful API based integration framework for one of the largest Life Insurance companies. API integration was created between Oracle EPM Cloud platform and Salesforce Financial Services Cloud, custom Finance, Accounting and Insurance systems leveraging advanced capabilities of REST API in Alteryx enterprise ETL tool, and API modeling along with JSON data payload structure development in Postman client.
- Architected and led the development of over million-dollar PwC project consisting of cloud-based enterprise computational platform for Finance and Tax area to address corporate multi-state Tax Apportionment reporting. Led the requirements gathering and coordinated a number subject matter experts across multiple states and developed product roadmap. Platform leveraged Amazon AWS lambda services and step-functions for RESTful APIs and Microservices deployment to provide flexible and highly modular Rules Engine framework.
- For a large automobile manufacturing company located in Michigan, US - designed and architected Data Collection Package (Forms) Solution based on the Oracle Hyperion platform to support data submission by various controllers spread across 30+ countries for international and domestic transfer pricing and compliance. Developed java web services-based integration architecture and modular rules for computations.
- Built Enterprise Performance Management Oracle on-prem/Cloud infrastructure which resulted in generating revenue well over 10 million in Finance sector.
- Demonstrated leadership skills by heading technology innovation at the practice level - consolidated a number of redundant client-facing solutions and created an enterprise data and application framework for client solution blueprint.

Deloitte Consulting, TX **Sep 2012 – Feb 2016**
Senior Manager

- For a large automobile manufacturing company located in US and Canada - designed and architected a custom application for German E-Tax Balance Sheet (e-Balance) reporting for Germany based on HFM infrastructure. Developed RESTful API web services integrations model to connect their Financial Management system, accounting and tax reporting system.
- Led architecture for a multi-million-dollar financial transformation initiative for one of the largest publicly traded REIT companies. Implemented restful API-based web services integration between finance and tax solutions for compliance reporting (income and asset test federal compliance).
- Architected Data Hub/Data Lake as a foundation for record-to-report solution integrating SAP/Oracle ERP Systems to address IRS audit involving 250+ global Legal Entities and spanning three years duration. This initiative helped reduce Wall Street risk exposure and eliminated $5-$6 million dollars in IRS penalties. Data integrations were accomplished through web services architecture.
- Served as a Design Advisor for Oracle's new Hyperion Tax Provision (HTP) software development. Involved in pre-release beta testing of this product and recommendations. Built strong relationships

with Oracle's Development Team and Executive Management associated with the HTP, leading to the PwC practice winning many implementations.

Adodis LLC, TX May 2011 - Sep 2012
Enterprise Architect, US Operations

- Coordinated offshore technical and business development resources in India consisting over 150 team members. Implemented content management systems and e-commerce solutions for clients in various industries.
- Managed and orchestrated offshore resources to serve US clients and successfully implemented a number of enterprise projects. Responsible for US P&L and delivery.

Sapient, OH May 2010 - May 2011
Enterprise Architect & Program Manager

- Architected SDL Tridion based content management system and RESTful API development for integrations for one of the biggest student loan financing agencies in the US. Managed 40+ team members from onsite and offshore locations
- Architected and designed e-commerce solutions on Oracle ATG and SAP Hybris technology platforms for companies in retail & food industries.
- Led and architected integration initiative for one of the largest retail customers in implementing PayPal and Bill Me Later payment gateway integrations involving over 11 business areas and over 27 major backend systems.

Technocor Inc / BAS Consulting, OH Jan 2010 – May 2010
Solutions Architect

- Developed consulting opportunities Content Management (ECM) and identified potential opportunities in areas of risk management, compliance and records management for Private and Public sectors through initiating alliances with tier one consulting companies
- Prepared and reviewed Profit & Loss (P&L) statements and identified measures for operational efficiency and cash flow improvements. Developed comprehensive business plan and active sourcing for funding to Angel Investment and Venture Capital Firms.

Education

- Post-Doctoral Fellow, University of Cincinnati
- Ph.D., Osmania University
- Master of Science, Saurashtra University
- Bachelor of Science, Osmania University

Certifications

- AWS Certified Solutions Architect Associate
- UiPath Diploma of Completion for Robotic Process Automation (RPA)
- Six Sigma Green Belt Certification
- Six Sigma Yellow Belt Certification
- AIIM's Electronic Records Management (ERM) Certification
- IBM WebSphere Commerce Suite Certification

JAMES MADISON UNIVERSITY

Request for Proposal

RFP# FDC-1175

Information Technology Consulting Services

June 15, 2023

VIRGINIA ASSOCIATION OF STATE COLLEGE & UNIVERSITY PURCHASING PROFESSIONALS

VASCUPP

ANSWER/INQUIRY SUBMISSION FORM

DEADLINE FOR SUBMISSION OF QUESTIONS: Thursday, July 20, 2023 @ 5:00 p.m.

****PROCEDURE FOR SUBMITTING QUESTIONS****

All questions and inquiries shall be formally submitted on this document. Questions shall be submitted in writing and shall reference, whenever possible, the Page, Section, Item number within the Statement of Needs specifications of this document that the question is in reference to.

Questions shall be submitted to: Doug Chester at the following e-mail address: chestefd@jmu.edu.

Answers to all questions received will be issued through a written addendum (if applicable) and become a part of the permanent record of this solicitation.

Date: _____

Project Location: James Madison University
Project # & Title: FDC-1175 Information Technology Consulting Services

The following question concerns: (indicate)

RFP Document: Section (number) _____, Page _____, Paragraph _____,

_____

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Question submitted by:

_____

Name Organization E-mail Address

REQUEST FOR PROPOSAL
RFP# FDC-1175

Issue Date: **June 15, 2023**

Title: **Information Technology Consulting Services**

Issuing Agency: **Commonwealth of Virginia**
James Madison University
Procurement Services MSC 5720
752 Ott Street, Wine Price Building
First Floor, Suite 1023
Harrisonburg, VA 22807

Period of Contract: From Date of Award Through One Year (Renewable)

Sealed Proposals Will Be Received Until 2:00 PM on August 3, 2023 for Furnishing the Services Described Herein.

SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.

All Inquiries For Information And Clarification Should Be Directed To: Doug Chester, Buyer Senior, Procurement Services, chestefd@jmu.edu; 540-568-4272; (Fax) 540-568-7935 by July 20, 2023 by 5:00 PM EST.

NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.
In compliance with this Request for Proposal and to all the conditions imposed herein, the undersigned offers and agrees to furnish the goods/services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Name and Address of Firm:

_____

_____

_____

By: _____
(Signature in Ink)

Name: _____
(Please Print)

Date: _____ Title: _____

Web Address: _____ Phone: _____

Email: _____ Fax #: _____

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1_____ #2_____ #3_____ #4_____ #5_____ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:
□ YES; □ NO; ***IF YES*** ⇒⇒ □ SMALL; □ WOMAN; □ MINORITY ***IF MINORITY***: □ AA; □ HA; □ AsA; □ NW; □ Micro

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against an offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

REQUEST FOR PROPOSAL

RFP # FDC-1175

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A. Offeror Data Sheet
B. SWaM Utilization Plan
C. Sample of Standard Contract
D. Pricing Schedule

I. PURPOSE

The purpose of this Request for Proposal (RFP) is to solicit sealed proposals from qualified sources to enter into a contract to provide information technology consulting services for James Madison University (JMU), an agency of the Commonwealth of Virginia. Initial contract shall be for one (1) year with an option to renew for four (4) additional one-year periods.

II. BACKGROUND

James Madison University is a comprehensive university in Harrisonburg, Virginia and is part of the statewide system of public higher education in the Commonwealth. The university offers programs at the bachelor's, master's and doctoral levels with its primary emphasis on the undergraduate student. JMU's current enrollment is approximately 22,000 full and part-time students. The university employs approximately 4,000 faculty and staff. Further information about the University can be found at the following website: www.jmu.edu.

James Madison University's Office of Information Technology is responsible for technology initiatives for campus. JMU was an early adopter of PeopleSoft/Oracle's Campus Solutions product, serving as a beta for its development and implementation. Additionally, the University uses Oracle's PeopleSoft Financials, Human Resources, and the Interaction Hub for JMU's self-service portal. The University also currently uses Oracle's Identity Management suite. JMU actively manages Windows and Macintosh computer systems. The University's network is powered by Cisco technologies. A series of NEC Private Branch Enterprises (PBX's) and gateways constitute the Voice network.

James Madison University is currently utilizing the following technologies:

- Oracle Identity Management Suite 11g R2 P3
- Oracle/PeopleSoft Campus Solutions 9.2; PeopleTools 8.55.x
- Oracle/PeopleSoft Human Resources 9.2; PeopleTools 8.55.x
- Oracle/PeopleSoft Financial Management 9.2; PeopleTools 8.55.x
- Oracle/PeopleSoft Enterprise Application Portal 9.2; PeopleTools 8.55.x
- WebLogic
- Desktop Management: Microsoft Windows and Macintosh (SCCM, JAMF, Apple Enterprise Connect)
- Microsoft 365 (A5 license)
- Microsoft Active Directory
- Federation Services (Shibboleth, OpenID)
- Cisco technologies (including but not limited to network and video conferencing)
- Virtualization technologies (VMWare)
- Cherwell ITSM
- Salesforce (Enterprise CRM)
- NEC Voice and Collaboration Technologies
- Boomi

Additionally, JMU is engaged in a multi-year initiative ("Reengineering Madison") that will include implementing significant technology platforms such as an enterprise Customer Relationship Management (CRM) platform (Salesforce) and new data solutions for managing and visualizing JMU's data. Reengineering Madison will also involve replacing JMU's current PeopleSoft ERP (Enterprise Resource Management) platform, including Finance, Human Resources, and Student Administration applications, as well as current applications used for

managing the identities of JMU's constituents. For more information on Reengineering Madison, see https://www.jmu.edu/computing/projects/reengineering-madison/index.shtml.

The University is aware of other cooperative contracts awarded by higher education institutions in the Commonwealth. Firms currently on a cooperative contract with these institutions are not required to respond to this solicitation. The University reserves the right to request quotes from firms on other cooperative contracts, when it is deemed in the best interest of the University.

James Madison University reserves the right, when not in the best interest of the university, to decline award to any firm already on an existing VASCUPP cooperative contract in order to avoid duplication of contracts.

III. SMALL, WOMAN-OWNED AND MINORITY PARTICIPATION

It is the policy of the Commonwealth of Virginia to contribute to the establishment, preservation, and strengthening of small businesses and businesses owned by women and minorities, and to encourage their participation in State procurement activities. The Commonwealth encourages contractors to provide for the participation of small businesses and businesses owned by women and minorities through partnerships, joint ventures, subcontracts, and other contractual opportunities. Attachment B contains information on reporting spend data with subcontractors.

IV. STATEMENT OF NEEDS

James Madison University desires to contract with qualified firms to provide expertise and a range of services to support technologies used by the University. Contractor shall serve on special projects as a technology expert when requested and as needed. Reports shall be provided back to the University summarizing options and providing recommendations. Contractor shall serve as a technology advisor to understand, communicate, and propose solutions as requested. Contractor shall serve as a resource of research, implementation, troubleshooting, and other technical tasks to support the efforts of James Madison University Information Technology (JMU IT) staff. Functional consultants shall be represented by the Contractor as experts in the tasks and functions assigned. The University reserves the right to accept or reject any proposed or assigned consultant, without cause, at any time during the duration of the contract.

1. Describe your corporate competencies/experience providing IT consulting services for one or more of the technologies listed below.

    a. Oracle Core Technologies
    b. Oracle/PeopleSoft Enterprise Solutions
    c. Desktop and Mobile Device Management
    d. Microsoft Azure and M365
    e. Okta
    f. Data Analytics/Visualization/Warehouse/Lake
    g. Change Management Training, Services, & Certification
    h. Security and Federation Services
    i. Cisco Technologies, Infrastructure Support, and Virtualization
    j. Audio Visual Technologies

k. Secure Research Enclaves

l. Other Technology

2. Describe approach and methodology that will be used to provide IT consulting services to James Madison University. Include how your firm would manage the scope of projects.

3. Provide the names, qualifications, and experience of personnel to be assigned to James Madison University. Designate who would be assigned as the primary contact for the account.

4. Describe the ability to provide continuity of consultants throughout the duration of a project.

5. Describe IT consulting services available from your firm. Examples of services may include, but are not limited to, the following:

    a. Implementation

    b. Development

    c. Project Management

    d. Architecture and Design

    e. Capacity Planning

    f. Installation and Configuration

    g. Performance and Scalability

    h. Conversion

    i. Monitoring, Administration and Upgrades

    j. Training Development

    k. Operations Metrics

6. Describe training options and specify associated costs in *Section X. Pricing Schedule*. Include a catalog of training offerings and differentiation between technical staff and end-user training.

7. Provide examples of recent projects at higher education institutions comparable to James Madison University. Describe the project, time frame, end result, etc.

8. Describe the ability to provide for a thorough transfer of knowledge to JMU IT on any given project.

9. Describe your approach to project management.

10. Describe how your firm would propose a functional staffing plan indicating the number, characteristics, and schedule for the consultants.

11. Describe the functions that may be provided by a subcontractor of your firm. Specify the expertise and credentials required from the subcontractor.

V. PROPOSAL PREPARATION AND SUBMISSION

A. GENERAL INSTRUCTIONS

To ensure timely and adequate consideration of your proposal, offerors are to limit all contact, whether verbal or written, pertaining to this RFP to the James Madison University Procurement Office for the duration of this Proposal process. Failure to do so may jeopardize further consideration of Offeror's proposal.

1. RFP Response: In order to be considered for selection, the **Offeror shall submit a complete response to this RFP**; and shall submit to the issuing Purchasing Agency:

   a. **One (1) original** and **four (4) copies** of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with 3.f. below.

   b. **One (1) electronic copy in WORD format or searchable PDF** (*flash drive*) of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with 3.f. below.

   c. Should the proposal contain **proprietary information**, provide **one (1) redacted hard copy** of the proposal and all attachments with **proprietary portions removed or blacked out**. This copy should be clearly marked "*Redacted Copy*" on the front cover. The classification of an entire proposal document, line-item prices, and/or total proposal prices as proprietary or trade secrets is not acceptable. JMU shall not be responsible for the Contractor's failure to exclude proprietary information from this redacted copy.

      No other distribution of the proposal shall be made by the Offeror.

2. The version of the solicitation issued by JMU Procurement Services, as amended by any addenda, is the mandatory controlling version of the document. Any modification of, or additions to, the solicitation by the Offeror shall not modify the official version of the solicitation issued by JMU Procurement services unless accepted in writing by the University. Such modifications or additions to the solicitation by the Offeror may be cause for rejection of the proposal; however, JMU reserves the right to decide, on a case-by-case basis in its sole discretion, whether to reject such a proposal. If the modification or additions are not identified until after the award of the contract, the controlling version of the solicitation document shall still be the official state form issued by Procurement Services.

3. Proposal Preparation

   a. Proposals shall be signed by an authorized representative of the Offeror. All information requested should be submitted. Failure to submit all information requested may result in the purchasing agency requiring prompt submissions of missing information and/or giving a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by the purchasing agency. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.

b. Proposals shall be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.

c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, sub letter, and repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and sub letter should be repeated at the top of the next page. The proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at the appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.

d. As used in this RFP, the terms "must", "shall", "should" and "may" identify the criticality of requirements. "Must" and "shall" identify requirements whose absence will have a major negative impact on the suitability of the proposed solution. Items labeled as "should" or "may" are highly desirable, although their absence will not have a large impact and would be useful, but are not necessary. Depending on the overall response to the RFP, some individual "must" and "shall" items may not be fully satisfied, but it is the intent to satisfy most, if not all, "must" and "shall" requirements. The inability of an offeror to satisfy a "must" or "shall" requirement does not automatically remove that offeror from consideration; however, it may seriously affect the overall rating of the offeror' proposal.

e. Each copy of the proposal should be bound or contained in a single volume where practical. All documentation submitted with the proposal should be contained in that single volume.

f. Ownership of all data, materials and documentation originated and prepared for the State pursuant to the RFP shall belong exclusively to the State and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by the offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the offeror must invoke the protection of Section 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data is submitted. The written notice must specifically identify the data or materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret materials submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line-item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and will result in rejection and return of the proposal.

4. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to James Madison University. This provides an opportunity for the Offeror to clarify or elaborate on the proposal. This is a fact-finding and explanation session only and does not include negotiation. James Madison University will schedule the time and location of these presentations. Oral presentations are an option

of the University and may or may not be conducted. Therefore, proposals should be complete.

B. SPECIFIC PROPOSAL INSTRUCTIONS

Proposals should be as thorough and detailed as possible so that James Madison University may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following items as a complete proposal:

1. Return RFP cover sheet and all addenda acknowledgements, if any, signed and filled out as required.

2. Plan and methodology for providing the goods/services as described in Section IV. Statement of Needs of this Request for Proposal.

3. A written narrative statement to include, but not be limited to, the expertise, qualifications, and experience of the firm and resumes of specific personnel to be assigned to perform the work.

4. Offeror Data Sheet, included as *Attachment A* to this RFP.

5. Small Business Subcontracting Plan, included as *Attachment B* to this RFP. Offeror shall provide a Small Business Subcontracting plan which summarizes the planned utilization of Department of Small Business and Supplier Diversity (SBSD)-certified small businesses which include businesses owned by women and minorities, when they have received Department of Small Business and Supplier Diversity (SBSD) small business certification, under the contract to be awarded as a result of this solicitation. This is a requirement for all prime contracts in excess of $100,000 unless no subcontracting opportunities exist.

6. Identify the amount of sales your company had during the last twelve months with each VASCUPP Member Institution. A list of VASCUPP Members can be found at: www.VASCUPP.org.

7. Proposed Cost. See Section X. Pricing Schedule of this Request for Proposal.

VI. EVALUATION AND AWARD CRITERIA

A. EVALUATION CRITERIA

Proposals shall be evaluated by James Madison University using the following criteria:

1. Quality of products/services offered and suitability for intended purposes

2. Qualifications and experience of Offeror in providing the goods/services

3. Specific plans or methodology to be used to perform the services

4. Participation of Small, Women-Owned, & Minority (SWaM) Businesses

5. Cost

Allocation of points for evaluation criteria will be published to the eVA solicitation posting prior to the closing date and time.

AWARD TO MULTIPLE OFFERORS: Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offerors so selected. Price shall be considered but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the agency shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. The Commonwealth reserves the right to make multiple awards as a result of this solicitation. The Commonwealth may cancel this Request for Proposals or reject proposals at any time prior to an award and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous. Should the Commonwealth determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation and the contractor's proposal as negotiated.

VII. GENERAL TERMS AND CONDITIONS

A. PURCHASING MANUAL: This solicitation is subject to the provisions of the Commonwealth of Virginia's Purchasing Manual for Institutions of Higher Education and Their Vendors and any revisions thereto, which are hereby incorporated into this contract in their entirety. A copy of the manual is available for review at the purchasing office. In addition, the manual may be accessed electronically at http://www.jmu.edu/procurement or a copy can be obtained by calling Procurement Services at (540) 568-3145.

B. APPLICABLE LAWS AND COURTS: This solicitation and any resulting contract shall be governed in all respects by the laws of the Commonwealth of Virginia and any litigation with respect thereto shall be brought in the courts of the Commonwealth. The Contractor shall comply with applicable federal, state and local laws and regulations.

C. ANTI-DISCRIMINATION: By submitting their proposals, offerors certify to the Commonwealth that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With Disabilities Act and §10 of the Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 (available for review at http://www.jmu.edu/procurement). If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender, sexual orientation, gender identity, or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. *(§6 of the Rules Governing Procurement*).

In every contract over $10,000 the provisions in 1. and 2. below apply:

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

a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the contractor. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.

b. The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.

c. Notices, advertisements, and solicitations placed in accordance with federal law, rule, or regulation shall be deemed sufficient for the purpose of meeting these requirements.

2. The contractor will include the provisions of 1. above in every subcontract or purchase order over $10,000, so that the provisions will be binding upon each subcontractor or vendor.

D. ETHICS IN PUBLIC CONTRACTING: By submitting their proposals, offerors certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other offeror, supplier, manufacturer or subcontractor in connection with their proposal, and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.

E. IMMIGRATION REFORM AND CONTROL ACT OF 1986: By entering into a written contract with the Commonwealth of Virginia, the Contractor certifies that the Contractor does not, and shall not during the performance of the contract for goods and services in the Commonwealth, knowingly employ an unauthorized alien as defined in the federal Immigration Reform and Control Act of 1986.

F. DEBARMENT STATUS: By submitting their proposals, offerors certify that they are not currently debarred by the Commonwealth of Virginia from submitting proposals on contracts for the type of goods and/or services covered by this solicitation, nor are they an agent of any person or entity that is currently so debarred.

G. ANTITRUST: By entering into a contract, the contractor conveys, sells, assigns, and transfers to the Commonwealth of Virginia all rights, title and interest in and to all causes of action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under said contract.

H. MANDATORY USE OF STATE FORM AND TERMS AND CONDITIONS RFPs: Failure to submit a proposal on the official state form provided for that purpose may be a cause for rejection of the proposal. Modification of or additions to the General Terms and Conditions of the solicitation may be cause for rejection of the proposal; however, the Commonwealth reserves the right to decide, on a case-by-case basis, in its sole discretion, whether to reject such a proposal.

I. CLARIFICATION OF TERMS: If any prospective offeror has questions about the specifications or other solicitation documents, the prospective offeror should contact the buyer whose name appears on the face of the solicitation no later than five working days before the due date. Any revisions to the solicitation will be made only by addendum issued by the buyer.

J. PAYMENT:

1. To Prime Contractor:

a. Invoices for items ordered, delivered and accepted shall be submitted by the contractor directly to the payment address shown on the purchase order/contract. All invoices shall show the state contract number and/or purchase order number; social security number (for individual contractors) or the federal employer identification number (for proprietorships, partnerships, and corporations).

b. Any payment terms requiring payment in less than 30 days will be regarded as requiring payment 30 days after invoice or delivery, whichever occurs last. This shall not affect offers of discounts for payment in less than 30 days, however.

c. All goods or services provided under this contract or purchase order, that are to be paid for with public funds, shall be billed by the contractor at the contract price, regardless of which public agency is being billed.

d. The following shall be deemed to be the date of payment: the date of postmark in all cases where payment is made by mail, or the date of offset when offset proceedings have been instituted as authorized under the Virginia Debt Collection Act.

e. Unreasonable Charges. Under certain emergency procurements and for most time and material purchases, final job costs cannot be accurately determined at the time orders are placed. In such cases, contractors should be put on notice that final payment in full is contingent on a determination of reasonableness with respect to all invoiced charges. Charges which appear to be unreasonable will be researched and challenged, and that portion of the invoice held in abeyance until a settlement can be reached. Upon determining that invoiced charges are not reasonable, the Commonwealth shall promptly notify the contractor, in writing, as to those charges which it considers unreasonable and the basis for the determination. A contractor may not institute legal action unless a settlement cannot be reached within thirty (30) days of notification. The provisions of this section do not relieve an agency of its prompt payment obligations with respect to those charges which are not in dispute (*Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 § 53; available for review at http://www.jmu.edu/procurement*).

2. To Subcontractors:

a. A contractor awarded a contract under this solicitation is hereby obligated:

(1) To pay the subcontractor(s) within seven (7) days of the contractor's receipt of payment from the Commonwealth for the proportionate share of the payment received for work performed by the subcontractor(s) under the contract; or

(2) To notify the agency and the subcontractors, in writing, of the contractor's intention to withhold payment and the reason.

b. The contractor is obligated to pay the subcontractor(s) interest at the rate of one percent per month (unless otherwise provided under the terms of the contract) on all amounts owed by the contractor that remain unpaid seven (7) days following receipt of payment from the Commonwealth, except for amounts withheld as stated in (2) above. The date of mailing of any payment by U. S. Mail is deemed to be payment to the addressee. These provisions apply to each sub-tier contractor performing under the primary contract. A contractor's obligation to pay an interest charge to a subcontractor may not be construed to be an obligation of the Commonwealth.

3. Each prime contractor who wins an award in which provision of a SWAM procurement plan is a condition to the award, shall deliver to the contracting agency or institution, on or before request for final payment, evidence and certification of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the SWAM procurement plan. Final payment under the contract in question may be withheld until such certification is delivered and, if necessary, confirmed by the agency or institution, or other appropriate penalties may be assessed in lieu of withholding such payment.

4. The Commonwealth of Virginia encourages contractors and subcontractors to accept electronic and credit card payments.

K. PRECENDENCE OF TERMS: Paragraphs A through J of these General Terms and Conditions and the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors, shall apply in all instances. In the event there is a conflict between any of the other General Terms and Conditions and any Special Terms and Conditions in this solicitation, the Special Terms and Conditions shall apply.

L. QUALIFICATIONS OF OFFERORS: The Commonwealth may make such reasonable investigations as deemed proper and necessary to determine the ability of the offeror to perform the services/furnish the goods and the offeror shall furnish to the Commonwealth all such information and data for this purpose as may be requested. The Commonwealth reserves the right to inspect offeror's physical facilities prior to award to satisfy questions regarding the offeror's capabilities. The Commonwealth further reserves the right to reject any proposal if the evidence submitted by, or investigations of, such offeror fails to satisfy the Commonwealth that such offeror is properly qualified to carry out the obligations of the contract and to provide the services and/or furnish the goods contemplated therein.

M. TESTING AND INSPECTION: The Commonwealth reserves the right to conduct any test/inspection it may deem advisable to assure goods and services conform to the specifications.

N. ASSIGNMENT OF CONTRACT: A contract shall not be assignable by the contractor in whole or in part without the written consent of the Commonwealth.

O. CHANGES TO THE CONTRACT: Changes can be made to the contract in any of the following ways:

1. The parties may agree in writing to modify the scope of the contract. An increase or decrease in the price of the contract resulting from such modification shall be agreed to by the parties as a part of their written agreement to modify the scope of the contract.

2. The Purchasing Agency may order changes within the general scope of the contract at any time by written notice to the contractor. Changes within the scope of the contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. The contractor shall comply with the notice upon receipt. The contractor shall be compensated for any additional costs incurred as the result of such order and shall give the Purchasing Agency a credit for any savings. Said compensation shall be determined by one of the following methods:

   a. By mutual agreement between the parties in writing; or

   b. By agreeing upon a unit price or using a unit price set forth in the contract, if the work to be done can be expressed in units, and the contractor accounts for the number of units of work performed, subject to the Purchasing Agency's right to audit the contractor's records and/or to determine the correct number of units independently; or

   c. By ordering the contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the contract. The same markup shall be used for determining a decrease in price as the result of savings realized. The contractor shall present the Purchasing Agency with all vouchers and records of expenses incurred and savings realized. The Purchasing Agency shall have the right to audit the records of the contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to the Purchasing Agency within thirty (30) days from the date of receipt of the written order from the Purchasing Agency. If the parties fail to agree on an amount of adjustment, the question of an increase or decrease in the contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this contract shall excuse the contractor from promptly complying with the changes ordered by the Purchasing Agency or with the performance of the contract generally.

P. DEFAULT: In case of failure to deliver goods or services in accordance with the contract terms and conditions, the Commonwealth, after due oral or written notice, may procure them from other sources and hold the contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which the Commonwealth may have.

Q. INSURANCE: By signing and submitting a proposal under this solicitation, the offeror certifies that if awarded the contract, it will have the following insurance coverage at the time the contract is awarded. For construction contracts, if any subcontractors are involved, the subcontractor will have workers' compensation insurance in accordance with§ 25 of the Rules Governing Procurement – Chapter 2, Exhibit J, Attachment 1, and 65.2-800 et. Seq. of the Code of Virginia (available for review at http://www.jmu.edu/procurement) The offeror further certifies that the contractor and any subcontractors will maintain these insurance coverage during the entire term of the contract and that all insurance coverage will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

MINIMUM INSURANCE COVERAGES AND LIMITS REQUIRED FOR MOST CONTRACTS:

1. Workers' Compensation: Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify the Commonwealth of increases in the number of employees that change their workers' compensation requirement under the Code of Virginia during the course of the contract shall be in noncompliance with the contract.

2. Employer's Liability: $100,000

3. Commercial General Liability: $1,000,000 per occurrence and $2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. The Commonwealth of Virginia must be named as an additional insured and so endorsed on the policy.

4. Automobile Liability: $1,000,000 combined single limit. (*Required only if a motor vehicle not owned by the Commonwealth is to be used in the contract. Contractor must assure that the required coverage is maintained by the Contractor (or third party owner of such motor vehicle.*)

R. ANNOUNCEMENT OF AWARD: Upon the award or the announcement of the decision to award a contract over $100,000, as a result of this solicitation, the purchasing agency will publicly post such notice on the DGS/DPS eVA web site (www.eva.virginia.gov) for a minimum of 10 days.

S. DRUG-FREE WORKPLACE: During the performance of this contract, the contractor agrees to (i) provide a drug-free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over $10,000, so that the provisions will be binding upon each subcontractor or vendor.

For the purposes of this section, "drug-free workplace" means a site for the performance of work done in connection with a specific contract awarded to a contractor, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.

T. NONDISCRIMINATION OF CONTRACTORS: An offeror, or contractor shall not be discriminated against in the solicitation or award of this contract because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, faith-based organizational status, any other basis prohibited by state law relating to discrimination in employment or because the offeror employs ex-offenders unless the state agency, department or institution has made a written determination that employing ex-offenders on the specific contract is not in its best interest. If the award of this contract is made to a faith-based organization and an individual, who applies for or receives goods, services, or disbursements provided pursuant to this contract objects to the religious character of the faith-based organization from which the individual receives or would receive the goods, services, or

disbursements, the public body shall offer the individual, within a reasonable period of time after the date of his objection, access to equivalent goods, services, or disbursements from an alternative provider.

U. eVA BUSINESS TO GOVERNMENT VENDOR REGISTRATION, CONTRACTS, AND ORDERS: The eVA Internet electronic procurement solution, website portal www.eVA.virginia.gov, streamlines and automates government purchasing activities in the Commonwealth. The eVA portal is the gateway for vendors to conduct business with state agencies and public bodies. All vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet eprocurement solution by completing the free eVA Vendor Registration. All offerors must register in eVA and pay the Vendor Transaction Fees specified below; failure to register will result in the proposal being rejected. Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

1. For orders issued July 1, 2014 and after, the Vendor Transaction Fee is:

   a. Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at $500 per order.

   b. Businesses that are not Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at $1,500 per order.

2. For orders issued prior to July 1, 2014 the vendor transaction fees can be found at www.eVA.virginia.gov.

3. The specified vendor transaction fee will be invoiced by the Commonwealth of Virginia Department of General Services approximately 60 days after the corresponding purchase order is issued and payable 30 days after the invoice date. Any adjustments (increases/decreases) will be handled through purchase order changes.

V. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that the Commonwealth of Virginia shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.

W. PRICING CURRENCY: Unless stated otherwise in the solicitation, offerors shall state offered prices in U.S. dollars.

X. E-VERIFY REQUIREMENT OF ANY CONTRACTOR: Any employer with more than an average of 50 employees for the previous 12 months entering into a contract in excess of $50,000 with James Madison University to perform work or provide services pursuant to such contract shall register and participate in the E-Verify program to verify information and work authorization of its newly hired employees performing work pursuant to any awarded contract.

Y. CIVILITY IN STATE WORKPLACES: The contractor shall take all reasonable steps to ensure that no individual, while performing work on behalf of the contractor or any subcontractor in connection with this agreement (each, a "Contract Worker"), shall engage in 1) harassment (including sexual harassment), bullying, cyber-bullying, or threatening or violent conduct, or 2) discriminatory behavior on the basis of race, sex, color, national origin, religious belief,

sexual orientation, gender identity or expression, age, political affiliation, veteran status, or disability.

The contractor shall provide each Contract Worker with a copy of this Section and will require Contract Workers to participate in training on civility in the State workplace. Upon request, the contractor shall provide documentation that each Contract Worker has received such training.

For purposes of this Section, "State workplace" includes any location, permanent or temporary, where a Commonwealth employee performs any work-related duty or is representing his or her agency, as well as surrounding perimeters, parking lots, outside meeting locations, and means of travel to and from these locations. Communications are deemed to occur in a State workplace if the Contract Worker reasonably should know that the phone number, email, or other method of communication is associated with a State workplace or is associated with a person who is a State employee.

The Commonwealth of Virginia may require, at its sole discretion, the removal and replacement of any Contract Worker who the Commonwealth reasonably believes to have violated this Section.

This Section creates obligations solely on the part of the contractor. Employees or other third parties may benefit incidentally from this Section and from training materials or other communications distributed on this topic, but the Parties to this agreement intend this Section to be enforceable solely by the Commonwealth and not by employees or other third parties.

VIII. SPECIAL TERMS AND CONDITIONS

A. AUDIT: The Contractor hereby agrees to retain all books, records, systems, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The Commonwealth of Virginia, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.

B. CANCELLATION OF CONTRACT: James Madison University reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.

C. IDENTIFICATION OF PROPOSAL ENVELOPE: The signed proposal should be returned in a separate envelope or package, sealed and identified as follows:

From: _____

Name of Offeror Due Date Time

_____

Street or Box No. RFP #

_____

City, State, Zip Code RFP Title

Name of Purchasing Officer: _____

The envelope should be addressed as directed on the title page of the solicitation.
The Offeror takes the risk that if the envelope is not marked as described above, it may be inadvertently opened and the information compromised, which may cause the proposal to be disqualified. Proposals may be hand-delivered to the designated location in the office issuing the solicitation. No other correspondence or other proposals should be placed in the envelope.

D. LATE PROPOSALS: To be considered for selection, proposals must be received by the issuing office by the designated date and hour. The official time used in the receipt of proposals is that time on the automatic time stamp machine in the issuing office. Proposals received in the issuing office after the date and hour designated are automatically non responsive and will not be considered. The University is not responsible for delays in the delivery of mail by the U.S. Postal Service, private couriers, or the intra university mail system. It is the sole responsibility of the Offeror to ensure that its proposal reaches the issuing office by the designated date and hour.

E. UNDERSTANDING OF REQUIREMENTS: It is the responsibility of each offeror to inquire about and clarify any requirements of this solicitation that is not understood. The University will not be bound by oral explanations as to the meaning of specifications or language contained in this solicitation. Therefore, all inquiries deemed to be substantive in nature must be in writing and submitted to the responsible buyer in the Procurement Services Office. Offerors must ensure that written inquiries reach the buyer at least five (5) days prior to the time set for receipt of offerors proposals. A copy of all queries and the respective response will be provided in the form of an addendum to all offerors who have indicated an interest in responding to this solicitation. Your signature on your Offer certifies that you fully understand all facets of this solicitation. These questions may be sent by Fax to 540/568-7935.

F. RENEWAL OF CONTRACT: This contract may be renewed by the Commonwealth for a period of four (4) successive one year periods under the terms and conditions of the original contract except as stated in 1. and 2. below. Price increases may be negotiated only at the time of renewal. Written notice of the Commonwealth's intention to renew shall be given approximately 90 days prior to the expiration date of each contract period.

1. If the Commonwealth elects to exercise the option to renew the contract for an additional one-year period, the contract price(s) for the additional one year shall not exceed the contract price(s) of the original contract increased/decreased by no more than the percentage increase/decrease of the other services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.

2. If during any subsequent renewal periods, the Commonwealth elects to exercise the option to renew the contract, the contract price(s) for the subsequent renewal period shall not exceed the contract price(s) of the previous renewal period increased/decreased by more than the percentage increase/decrease of the other services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.

G. SUBMISSION OF INVOICES: All invoices shall be submitted within sixty days of contract term expiration for the initial contract period as well as for each subsequent contract renewal period. Any invoices submitted after the sixty day period will not be processed for payment.

H. OPERATING VEHICLES ON JAMES MADISON UNIVERSITY CAMPUS: Operating vehicles on sidewalks, plazas, and areas heavily used by pedestrians is prohibited. In the unlikely event a driver should find it necessary to drive on James Madison University

sidewalks, plazas, and areas heavily used by pedestrians, the driver must yield to pedestrians. For a complete list of parking regulations, please go to www.jmu.edu/parking; or to acquire a service representative parking permit, contact Parking Services at 540.568.3300. The safety of our students, faculty and staff is of paramount importance to us. Accordingly, violators may be charged.

I. COOPERATIVE PURCHASING / USE OF AGREEMENT BY THIRD PARTIES: It is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement. Accordingly, any public body, (to include government/state agencies, political subdivisions, etc.), cooperative purchasing organizations, public or private health or educational institutions or any University related foundation and affiliated corporations may access any resulting contract if authorized by the Contractor.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. As a separate contractual relationship, the participating entity will place its own orders directly with the Contractor(s) and shall fully and independently administer its use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the University. No modification of this contract or execution of a separate agreement is required to participate; however, the participating entity and the Contractor may modify the terms and conditions of this contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the Contractor.

The Contractor will notify the University in writing of any such entities accessing this contract. The Contractor will provide semi-annual usage reports for all entities accessing the contract. The University shall not be held liable for any costs or damages incurred by any other participating entity as a result of any authorization by the Contractor to extend the contract. It is understood and agreed that the University is not responsible for the acts or omissions of any entity and will not be considered in default of the contract no matter the circumstances.

Use of this contract(s) does not preclude any participating entity from using other contracts or competitive processes as needed.

J. SMALL BUSINESS SUBCONTRACTING AND EVIDENCE OF COMPLIANCE:

1. It is the goal of the Commonwealth that 42% of its purchases are made from small businesses. This includes discretionary spending in prime contracts and subcontracts. All potential offerors are required to submit a Small Business Subcontracting Plan. Unless the offeror is registered as a Department of Small Business and Supplier Diversity (SBSD)-certified small business and where it is practicable for any portion of the awarded contract to be subcontracted to other suppliers, the contractor is encouraged to offer such subcontracting opportunities to SBSD-certified small businesses. This shall not exclude SBSD-certified women-owned and minority-owned businesses when they have received SBSD small business certification. No offeror or subcontractor shall be considered a Small Business, a Women-Owned Business or a Minority-Owned Business unless certified as such by the Department of Small Business and Supplier Diversity (SBSD) by the due date for receipt of proposals. If small business subcontractors are used, the prime contractor agrees to report the use of small business subcontractors by providing the purchasing office at a minimum the following information: name of small business with the SBSD certification number or FEIN, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product/service provided.

This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807.

2. Each prime contractor who wins an award in which provision of a small business subcontracting plan is a condition of the award, shall deliver to the contracting agency or institution with every request for payment, evidence of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the small business subcontracting plan. **This information shall be submitted to: JMU Office of Procurement Services, SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807**. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm with the Department of Small Business and Supplier Diversity (SBSD) certification number or FEIN number, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product or service provided. Payment(s) may be withheld until compliance with the plan is received and confirmed by the agency or institution. The agency or institution reserves the right to pursue other appropriate remedies to include, but not be limited to, termination for default.

3. Each prime contractor who wins an award valued over $200,000 shall deliver to the contracting agency or institution with every request for payment, information on use of subcontractors that are not Department of Small Business and Supplier Diversity (SBSD)-certified small businesses. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm, phone number, FEIN number, total dollar amount subcontracted, and type of product or service provided. **This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807**.

K. AUTHORIZATION TO CONDUCT BUSINESS IN THE COMMONWEALTH: A contractor organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership shall be authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 of the Code of Virginia or as otherwise required by law. Any business entity described above that enters into a contract with a public body shall not allow its existence to lapse or its certificate of authority or registration to transact business in the Commonwealth, if so required under Title 13.1 or Title 50, to be revoked or cancelled at any time during the term of the contract. A public body may void any contract with a business entity if the business entity fails to remain in compliance with the provisions of this section.

L. PUBLIC POSTING OF COOPERATIVE CONTRACTS: James Madison University maintains a web-based contracts database with a public gateway access. Any resulting cooperative contract/s to this solicitation will be posted to the publicly accessible website. Contents identified as proprietary information will not be made public.

M. CRIMINAL BACKGROUND CHECKS OF PERSONNEL ASSIGNED BY CONTRACTOR TO PERFORM WORK ON JMU PROPERTY: The Contractor shall obtain criminal background checks on all of their contracted employees who will be assigned to perform services on James Madison University property. The results of the background checks will be directed solely to the Contractor. The Contractor bears responsibility for confirming to the University contract administrator that the background checks have been completed prior to work being performed by their employees or subcontractors. The Contractor shall only assign to work on the University campus those individuals whom it deems qualified and permissible

based on the results of completed background checks. Notwithstanding any other provision herein, and to ensure the safety of students, faculty, staff and facilities, James Madison University reserves the right to approve or disapprove any contract employee that will work on JMU property. Disapproval by the University will solely apply to JMU property and should have no bearing on the Contractor's employment of an individual outside of James Madison University.

N. INDEMNIFICATION: Contractor agrees to indemnify, defend and hold harmless the Commonwealth of Virginia, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, arising from or caused by the use of any materials, goods, or equipment of any kind or nature furnished by the contractor/any services of any kind or nature furnished by the contractor, provided that such liability is not attributable to the sole negligence of the using agency or to failure of the using agency to use the materials, goods, or equipment in the manner already and permanently described by the contractor on the materials, goods or equipment delivered.

O. ADDITIONAL GOODS AND SERVICES: The University may acquire other goods or services that the supplier provides than those specifically solicited. The University reserves the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services under the same pricing, terms, and conditions and to make modifications or enhancements to the existing goods and services. Such additional goods and services may include other products, components, accessories, subsystems, or related services that are newly introduced during the term of this Agreement. Such additional goods and services will be provided to the University at favored nations pricing, terms, and conditions.

P. SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent of the purchasing agency. In the event that the contractor desires to subcontract some part of the work specified herein, the contractor shall furnish the purchasing agency the names, qualifications and experience of their proposed subcontractors. The contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of the contract.

Q. PRIME CONTRACTOR RESPONSIBILITIES: The contractor shall be responsible for completely supervising and directing the work under this contract and all subcontractors that he may utilize, using his best skill and attention. Subcontractors who perform work under this contract shall be responsible to the prime contractor. The contractor agrees that he is as fully responsible for the acts and omissions of his subcontractors and of persons employed by them as he is for the acts and omissions of his own employees.

R. CONFIDENTIALITY OF PERSONALLY IDENTIFIABLE INFORMATION: The Contractor assures that information and data obtained as to personal facts and circumstances related to students, faculty, and staff will be collected and held confidential, during and following the term of this agreement, and will not be divulged without the individual's and the agency's written consent and only in accordance with federal law or the *Code of Virginia*. Contractors who utilize, access, or store personally identifiable information as part of the performance of a contract are required to safeguard this information and immediately notify the agency of any breach or suspected breach in the security of such information. Contractors shall allow the agency to both participate in the investigation of incidents and exercise control over decisions regarding external reporting. Contractors and their employees working on this project may be required to sign a confidentiality statement.

IX. METHOD OF PAYMENT

The contractor will be paid based on invoices submitted in accordance with the solicitation and any negotiations. James Madison University recognizes the importance of expediting the payment process for our vendors and suppliers; we request that our vendors and suppliers enroll in our bank's Comprehensive Payable options: either the Virtual Payables Virtual Card or the PayMode-X electronic deposit (ACH) to your bank account so that future payments are made electronically. Contractors signed up for the Virtual Payables process will receive the benefit of being paid Net 15. Additional information is available online at:

http://www.jmu.edu/financeoffice/accounting-operations-disbursements/cash-investments/vendor-payment-methods.shtml

X. PRICING SCHEDULE

The Offeror shall provide onsite and offsite hourly rates broken down by position type for the proposed services. Onsite hourly rates shall include all billables (e.g. travel, lodging, meals, etc.). See Attachment D.

In addition to completing Attachment D, the Offeror shall also provide pricing for all other services, including training offerings.

Specify any associated charge card processing fees, if applicable, to be billed to the university. Vendors shall provide their VISA registration number when indicating charge card processing fees. Any vendor requiring information on VISA registration may refer to https://usa.visa.com/support/small-business/regulations-fees.html and for questions https://usa.visa.com/dam/VCOM/global/support-legal/documents/merchant-surcharging-qa-for-web.pdf.

XI. ATTACHMENTS

Attachment A: Offeror Data Sheet

Attachment B: Small, Women, and Minority-owned Business (SWaM) Utilization Plan

Attachment C: Standard Contract Sample

Attachment D: Pricing Schedule

ATTACHMENT A

OFFEROR DATA SHEET

TO BE COMPLETED BY OFFEROR

1. QUALIFICATIONS OF OFFEROR: Offerors must have the capability and capacity in all respects to fully satisfy the contractual requirements.

2. YEARS IN BUSINESS: Indicate the length of time you have been in business providing these types of goods and services.

   Years_____ Months_____

3. REFERENCES: Indicate below a listing of at least five (5) organizations, either commercial or governmental/educational, that your agency is servicing. Include the name and address of the person the purchasing agency has your permission to contact.

CLIENT	LENGTH OF SERVICE	ADDRESS	CONTACT PERSON/PHONE #

4. List full names and addresses of Offeror and any branch offices which may be responsible for administering the contract.

_____

_____

_____

_____

5. RELATIONSHIP WITH THE COMMONWEALTH OF VIRGINIA: Is any member of the firm an employee of the Commonwealth of Virginia who has a personal interest in this contract pursuant to the CODE OF VIRGINIA, SECTION 2.2-3100 – 3131?
   [ ] YES [ ] NO
   IF YES, EXPLAIN:_____

_____

_____

_____

ATTACHMENT B

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Offeror Name: _____ Preparer Name: _____

Date: _____

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes_____ No_____

If yes, certification number: _____ Certification date:_____

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes_____ No_____

If yes, certification number: _____ Certification date:_____

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes____ No_____

If yes, certification number: _____ Certification date:_____

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes_____ No_____

If yes, certification number: _____ Certification date: _____

Instructions: *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWAMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

Small Business: "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of $10 million or less averaged over the previous three years.

Woman-Owned Business Enterprise: A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified women-owned businesses are also a small business enterprise.**

Minority-Owned Business Enterprise: A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified minority-owned businesses are also a small business enterprise.**

Micro Business is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees **AND** no more than $3 million in average annual revenue over the three-year period prior to their certification.

All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWAM program. Certification applications are available through SBSD at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at http://www.sbsd.virginia.gov/ (Customer Service).

RETURN OF THIS PAGE IS REQUIRED

ATTACHMENT B (CNT'D)

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Procurement Name and Number: _____ Date Form Completed:_____

Listing of Sub-Contractors, to include, Small, Woman Owned and Minority Owned Businesses
for this Proposal and Subsequent Contract

Offeror / Proposer:

_____	_____	_____
Firm	Address	Contact Person/No.

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount (to include change orders)	Total Dollars Paid Subcontractor to date (to be submitted with request for payment from JMU)

(Form shall be submitted with proposal and if awarded, again with submission of each request for payment)

RETURN OF THIS PAGE IS REQUIRED

ATTACHMENT C

COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT

Contract No._____

This contract entered into this_____day of_____20____,by _____ hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide the services to the Purchasing Agency as set forth in the Contract Documents.

PERIOD OF PERFORMANCE: From_____ through_____

The contract documents shall consist of:

(1) This signed form;

(2) The following portions of the Request for Proposals dated _____:
- (a) The Statement of Needs,
- (b) The General Terms and Conditions,
- (c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
- (d) List each addendum that may be issued

(3) The Contractor's Proposal dated _____and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
- (a) Negotiations summary dated _____.

SAMPLE

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:	PURCHASING AGENCY:
By:_____	By:_____
(Signature)	(Signature)
_____	_____
(Printed Name)	(Printed Name)
Title:_____	Title:_____

Attachment D – Pricing Schedule

For each technology/category listed below, provide your company's hourly rate for each of the three roles listed. If you refer to the role by a different name, list it in the space provided next to the corresponding role. Onsite pricing must be inclusive of all billables (travel, lodging, meals, etc.)

***** ***The Offeror shall also provide onsite and offsite pricing for all other services/roles not listed below, including training offerings*. *****

	Onsite	Offsite
Oracle Core Technologies		
Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.
Oracle/PeopleSoft Enterprise Solutions		
Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.
Desktop and Mobile Device Management		
Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.
Microsoft Azure and M365		
Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.
Okta		
Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.
Data Analytics/Visualization/Warehouse/Lake		
Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.

	Onsite	Offsite
Change Management Training, Svcs, & Cert.		
Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.
Security and Federation Services		
Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.
Cisco Technologies, Infrastructure Support, and Virtualization		
Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.
Audio Visual Technologies		
Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.
Secure Research Enclaves		
Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.
Other Technology		
Project Manager or _____	_____/hr.	_____/hr.
Senior Engineer or _____	_____/hr.	_____/hr.
Engineer or _____	_____/hr.	_____/hr.

JAMES MADISON UNIVERSITY.

July 25, 2023

ADDENDUM NO.: One

TO ALL OFFERORS:

REFERENCE:	Request for Proposal No:	**RFP# FDC-1175**
	Dated:	**June 15, 2023**
	Commodity:	**Information Technology Consulting Services**
	RFP Closing On:	~~**Thursday, August 3, 2023, at 2:00 p.m.**~~ **Tuesday, August 15, 2023, at 2:00 p.m.**

Please note the clarifications and/or changes made on this proposal:

James Madison University has extended the RFP closing date to Tuesday, August 15, 2023 at 2:00 p.m.

Due to the volume of questions received, an additional addendum may be posted at a future date.

1. Question – On the 3rd page of the solicitation it states the period of performance is from date of award through one year (renewable). How many renewals periods does JMU expect in terms of being renewable?
   Answer – *Section VII. Special Terms and Conditions, Item F* states that JMU has the option to extend the original contract for four (4) successive one-year periods.

2. Question – How many FTEs are estimated to be needed onsite versus remote?
   Answer – This would depend on the nature of the engagement.

3. Question – In order to be awarded this project, does at least one (1) team member need to be SWaM certified? Do sub-contractors need to be small business and SWaM certified?
   Answer – SWaM certification is not a requirement for award; however, JMU tries to work with SWaM vendors whenever possible. Evaluation points will be given to vendors that are a SWaM vendor or that use SWaM sub-contractors. Additionally, all vendors should complete the SWaM Utilization Plan in the RFP document.

4. Question - Is there a page limit to RFP response?
   Answer – No; however, proposals should be prepared simply and economically (see section V.A.3.b.).

5. Question – What industry partner currently performs this work? What is the incumbent contract number and total dollar value if there is one? Please confirm if we can get the previous proposals or pricing of the incumbent(s).
   Answer – The University currently has contracts in place with the following vendors - Unicon, Inc., Sierra-Cedar, Inc., Securance Consulting, HyperGen, Inc, Plante & Moran, PLLC, Cherry Bekaert Advisory

MSC 5720
752 Ott Street, Room 1042
Wine Price Building
Harrisonburg, VA 22807
Office of 540.568.3145 Phone
PROCUREMENT SERVICES 540.568.7935 Fax

LLC, Highstreet IT Solutions, LLC, Nautiquos Business Solutions, LLC, Assura, Inc., and Planet Technologies, Inc. Previous spend can be found at www.eva.virginia.gov. Current contracts with the firms listed above can be found at http://cipag.jmu.edu/cipag/.

6. Question - Is remote only pricing an option? Will proposals be considered if only remote pricing is provided?
   Answer – All proposals will be considered, including remote only pricing.

7. Question – Can vendors only provide pricing for select areas as opposed to all areas?
   Answer – Offerors may provide pricing for one or more of the technologies/categories listed in the RFP (see *Section IV.1.*). Offerors should identify their firm's technology specializations in their proposal.

8. Question – Is hosting included as part of the services required?
   Answer – The scope may include hosting services, depending on the specific project.

9. Question – Is operations and maintenance – patching, vulnerability scanning, remediation, etc. included as a part of the services requested?
   Answer – The scope may include operations and maintenance services, depending on the specific project.

10. Question – Given that Oracle's Identity Management is currently used at JMU, how does JMU anticipate using Okta?
    Answer – The University has selected Okta as its future Identity Management solution.

11. Question – What is meant by Secure Research Enclaves?
    Answer - Using Microsoft's definition, the Secure Enclave for Research (also known as the Secure Research Enclave) is a reference architecture for a remotely-accessible environment for researchers to use in a secure manner while working on restricted data sets.

12. Question – Does the scope of the contract include the design and implementation of any hybrid cloud infrastructure?
    Answer – The scope may include the design and implementation of cloud/hybrid cloud infrastructure, depending on the specific project.

13. Question – What criteria does the University use to accept or reject proposed or assigned consultants, and how does this impact the contractor's role and responsibilities throughout the duration of the contract?
    Answer – Consultants assigned to the University may be rejected based on a variety of reasons including, but not limited to, lack in professionalism, responsiveness, timeliness, knowledge and experience, etc.

14. Question – Is the work expected to be SOW based or hourly based?
    Answer – That will depend on the nature of the engagement; however, it is reasonable to expect that either could apply.

15. Question – It is mentioned that sealed proposals will be received. Is there any that a vendor can submit a proposal online?
    Answer – No. JMU is not set up to receive electronic responses through eVA or emailed proposal responses.

16. Question – What is the annual spend at JMU for IT consulting services?
Answer – Previous spend can be found at www.eva.virginia.gov.

17. Question – Assuming an offeror currently holds a contract with a VASCUPP higher education institution, such as the University of Virginia or George Mason University, how does that impact our status on this RFP?
Answer – The last paragraph of the *Section II. Background* section states: "James Madison University reserves the right, when not in the best interest of the university, to decline award to any firm already on an existing VASCUPP cooperative contract in order to avoid duplication of contracts."

18. Question – Will you prefer vendors with a branch office presence in Harrisonburg? We are only present in Northern Virginia.
Answer – A branch office in Harrisonburg, VA is not required.

19. Question - Are there specific technologies within the listed categories (such as Oracle Core Technologies, Microsoft Azure, etc.) that require specialized expertise or are of higher priority in the context of JMU's Reengineering Madison?
Answer – See RFP *Section II. Background.*

20. Question - Can you provide more information about the typical scope and size of projects at James Madison University? Are there any specific project management methodologies or frameworks that the university prefers? Do you have any major projects in progress?
Answer – The University's major technology projects can be found at https://www.jmu.edu/computing/projects-and-initiatives.shtml.

21. Question - What is the expected duration of the projects? Will the assignments be short-term or long-term?
Answer – The expected duration will depend on the specific project and may be short-term or long-term.

22. Question - Are there any specific certifications or qualifications required for the assigned personnel?
Answer – Required certifications or qualifications will vary based on the specific project. Offerors should include the qualifications and experience of the personnel who may be assigned to perform work for the University in their proposals (See RFP *Section IV.3.*).

23. Question - Can you provide more details on the expected level of involvement and responsibilities of the primary contact for the account?
Answer – Expected level of involvement and responsibilities will vary based on the project.

24. Question - Can you provide more information about the evaluation criteria for assessing the similarity of projects at higher education institutions?
Answer – Offerors should provide examples of recent projects at higher education institutions comparable to James Madison University. See RFP *Section II. Background* for more information about the University.

25. Question - Are there any specific reporting or documentation requirements for IT consulting services?
Answer – Reporting and documentation requirements will vary depending on the project.

26. Question – Allocation of points for evaluation criteria will be published to the eVA solicitation posting prior to the closing date and time. When will this be posted?
Answer – The points will be posted the day before the RFP closes.

27. Question - Does the scope include advising and strategic planning support for the technologies listed?
Answer – The scope may include advising and strategic planning support, depending on the specific project.

28. Question - What will be the engagement model for Vendors that are awarded this contract? Will JMU issue statements of work for the selected vendors to compete? Will the statements of work be for hourly staff augmentation or will it also include fixed price strategic engagements? Can you provide additional information on the anticipated level of collaboration and coordination between the successful bidder and JMU IT staff?
Answer – As information technology consulting needs arise, the University will contact a firm(s) on contract to discuss the project for which the University requires assistance. A statement of work will be requested from the vendor based on contract terms and pricing, and additional discussions will occur.

29. Question - What will be the maximum number of awardees under this contract? Please confirm the anticipated number of awards.
Answer – The University does not have an anticipated or maximum number of awards for this RFP.

30. Question – For this RFP, are resources expected to be on-stie or remote in Harrisonburg, VA? Given the skill sets, we're assuming it's fully remote, but wanted to verify
Answer – Remote is usually acceptable; however, it would depend on the nature of the engagement.

31. Question - How many users are on Office 365? What license do they have? Provide a license count.
Answer – Approximately 30,000 accounts. The majority have A5 licenses with a few having A3 licenses.

32. Question - Are the licenses being purchased directly with Microsoft or through a Microsoft Partner?
Answer – SHI.

33. Question - Do you currently use Microsoft Teams and/or Microsoft SharePoint?
Answer – Yes.

34. Question - Is there a software in place currently to manage endpoints remotely? If so, what product(s) are being used?
Answer - JAMF Pro, Microsoft Intune, and Microsoft Endpoint Configuration Manager are used.

35. Question - How often are the devices and endpoints being updated? Monthly/quarterly/etc. basis?
Answer – Endpoint patches are deployed typically the same month they become available.

36. Question - Do you have employees working remotely that use a company device?
Answer – Yes.

37. Question - Do you offer Bring Your Own Device (BYOD) to employees?
Answer – No.

38. Question - Is there a Mobile Device Management (MDM) solution deployed?
Answer – Yes, for JMU owned devices.

39. Question - How many desktops/laptops/mobile devices are you supporting?
Answer – JMU IT actively manages roughly 4,500 Windows devices, 2,500 Mac devices, and 1,000 mobile devices.

40. Question - Which version of Windows are the desktops/laptops running on?
Answer – Primarily Windows 10 22H2.

41. Question - Are user devices being backed up? If so, how often, and do you have retention policies in place?
Answer – User devices are not centrally backed up.

42. Question – Are the servers on-site or on the cloud? Hybrid?
Answer - Servers are onsite.

43. If you have a cloud environment, is it Azure/AWS/other?
Answer – The University has applications in both Azure and AWS.

44. Question - How many servers do you have? What operating system are they on? Do you have any Windows Server 2012/2012R2? Any Linux Servers? Microsoft is sunsetting Windows 2012 servers in October. Is there a plan to upgrade/replace your current 2012 servers? Please provide details.
Answer – The University has approximately 500 servers. Windows and Linux.
    - **2012R2 (26 servers - all slated to decom by October, with the potential exception of 3 belonging to Card Services, which they handle on their own and are in discussions with IT-Sec about)**
    - **2016 (89 servers)**
    - **2019 (93 servers)**
    - **2022 (7 servers)**
    - **Linux (210 Servers) primarily running RHEL 7 & 8**
    - **16 - VMware Host servers, and 3 management servers, running VMWare version 7. (13 normal hosts, 3 VDI hosts, 2 VCenter servers and the VRealize server)**
    - **54 - additional servers are being tracked, but are either security servers (OS not maintained by us), Other Linux (CentOS) or OVAs (Virtual appliances)**

45. Question - Is there a Disaster Recovery plan in place? What is the infrastructure at the fail over location?
Answer - Yes. Disaster Recovery plans exist for critical systems. There is geographical, power, and HVAC redundancy at the failover location, as well as off-site backups in the event of whole data center loss.

46. Question - How many databases are you using? Please specify which ones.
Answer – See RFP *Section II. Background.*

47. Question - What are some of the critical applications being used today? Any ERP applications?
Answer – See RFP *Section II. Background.*

48. Question - What is the network topology currently used, and how are these locations communicating to each other?
Answer - On campus locations are serviced via single mode fiber. Off campus locations are a combination of DIA circuits and wireless bridges.

49. Question - Is there a VPN in place for remote access? Is there a firewall?
Answer - Yes to both.

50. Question - What is the speed of the network connection to the internet? Do you have a backup connection?
Answer - Two 8Gbs pipes in active/active state.

51. Question - How many Routers, Switches, and Firewalls are in your network?
Answer - L2 switches: 855
L3 switches/routers: 10
Firewalls: 4

52. Question - How many buildings/locations?
Answer – The University has approximately 185 buildings on 750 acres. The campus is divided by interstate 81 and the C&P railroad.

53. Question - How big is your current IT department, if any?
Answer - Approximately 150 employees

54. Question - Please provide the brand for the switches, network devices, laptops, desktops, and printers.
Answer - Cisco Routers and switches for the wired network. The wireless network is Aruba. Laptop/Desktops are a mix of Dell and Apple. Printers vary, but a significant number are leased KM Bizhub devices.

55. Question - Do you have any cameras to support?
Answer: Yes. Cameras are managed by Facilities Management.

56. Question - Do you currently have a VOIP solution? Who is your VOIP provider? What is the brand of your desktop phones? How many extensions/DID numbers?
Answer – The University is currently deploying an NEC VoIP solution with Black Box Network Services, and have approximately 8,000 user and service type extensions. Phones are NEC.

57. Question - Do you have ticketing system in place? Estimate of tickets per month/quarter?
Answer - Yes. The University uses Cherwell as its ITSM ticketing system and receives approximately 49,189 tickets per year.

58. Question - Do you require someone to be on-site all the time?
Answer - That would depend on the nature of the engagement.

59. Question - Is this a multi-vendor or single vendor award?
Answer – This is anticipated to be a multi-award contract.

60. Question - Is there Change Management system in place?
Answer - Technical hardware or software changes are managed through the University's ITSM.

61. Question - Is there an Information Technology Asset Management (ITAM) solution in place?
Answer – Not as such. The University uses Cherwell ITSM for CMDB, and JAMF Pro and Intune for MDM.

62. Question - What applications are currently in use?
Answer – See RFP *Section II. Background.*

63. Question - The RFP has some focus on Salesforce in the opening. But I see that Huron was awarded a contract for Salesforce work less than 6 months ago. Is JMU looking to understand other options that can support the Salesforce deployment if needed?
Answer – Yes, the University is interested in other Salesforce resources and skillset augmentation options.

64. Question – Are there any pain points of issues with the current vendor(s)?
Answer – No.

Signify receipt of this addendum by initialing *"Addendum #1_____"* on the signature page of your proposal.

Sincerely,

Doug Chester
Buyer Senior
Phone: 540-568-4272

JAMES MADISON UNIVERSITY.

August 3, 2023

ADDENDUM NO.: Two

TO ALL OFFERORS:

REFERENCE:	Request for Proposal No:	**RFP# FDC-1175**
	Dated:	**June 15, 2023**
	Commodity:	**Information Technology Consulting Services**
	RFP Closing On:	**Tuesday, August 15, 2023, at 2:00 p.m.**

Please note the clarifications and/or changes made on this proposal:

1. Question - How far along is the Reengineering Madison project? When is the new system expected to go live?
   Answer - See RFP *Section II. Background.*

2. Question - Can you please share the portfolio of projects/initiatives that will be executed under the Reengineering Madison program?
   Answer - See RFP *Section II. Background.*

3. Question - Can you provide ticket volumes that you are currently experiencing for PeopleSoft for the last one year, preferably by severity?
   Answer - No. Ticket volume alone is not a good indicator.

4. Question - What is the size of the existing support team supporting PeopleSoft?
   Answer – 10 people.

5. Question - Will existing support team members be moved to the Reengineering Madison project?
   Answer - Yes, in part.

6. Question - Can you provide the architecture diagram for your PeopleSoft application and its deployment?
   Answer - This information may be provided depending on the engagement and after the execution of a SOW.

7. Question - What is the current PUM level for each of the PeopleSoft application pillar?
   Answer - This information may be provided depending on the engagement and after the execution of a SOW.

8. Question - What is the number of environments that exist for each PeopleSoft application pillar (example – DEV, TEST, DMO, UAT etc.)?
   Answer – 4 environments.

Office of
PROCUREMENT SERVICES

MSC 5720
752 Ott Street, Room 1042
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540.568.3145 Phone
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9. Question - What is the size of the production database for each of the PeopleSoft application pillar?
   Answer - This information may be provided depending on the engagement and after the execution of a SOW.

10. Question - Does Oracle Core Technologies mean the Oracle DBA skill set? If not, please provide more details.
    Answer - Yes.

11. Question - What skills are required in Desktop and Mobile Device Management?
    Answer - Required skills, certifications, or qualifications will vary based on the specific project. Offerors should include the qualifications and experience of the personnel who may be assigned to perform work for the University in their proposals (See RFP *Section IV.3.*).

12. Question - Please provide details of the services expected in the following technologies:
    a. Security and Federation Services
    b. Microsoft 365 (M365)
    c. Audio and Visual Technologies
    d. Secure Research Enclaves

    Answer - Services may vary depending on the nature of the engagement.

13. Question - What is expected from Svcs and Cert in Change Management? What are the roles of Senior Engineer/Engineer in Change Management?
    Answer - See RFP *Section IV. Statement of Needs* and *Section D. Pricing Schedule.* If your firm refers to a specific role by a different name, list it in the space provided next to the corresponding role.

14. Question - Does onsite pricing refer to work specifically performed on campus (in person), and does offsite work pertain to work conducted within the US but off-campus, remote?
    Answer - Yes.

15. Question - What positions are you looking to fill immediately? Is there current or future project you are expecting?
    Answer - See RFP *Section II. Background.*

16. Question - For onsite services, we find that a base billable rate is suitable for most of our clients, and hotel/travel expenses charged as actuals later. Would you still like a single blended hourly charge for these positions including all expenses?
    Answer - Yes.

17. Question - What are the Oracle core technologies focused on consulting services like OBIA, OBIEE, ODI, OAC, etc.?
    Answer – Unavailable at this time.

18. Question - Is there a preferred cloud provider like AWS, GCP, or Azure for a data lake/data warehouse solution?
    Answer - No.

19. Question - Is the data warehouse/data lake solution in place that required migrating to a new tool stack or a new solution is expected?
    Answer - See RFP *Section II. Background.*

20. Question - Is there a preferred visualization tool for analytics?
Answer - No.

21. Question - Has Fluid UI been implemented in your PeopleSoft Application?
Answer - No.

22. Question - Is the Boomi atom/molecule installed on-premises or in the cloud?
Answer – On-premises.

23. Question - What Salesforce modules have been implemented/utilized?
Answer - Implementation is just beginning. See RFP *Section II. Background.*

24. Question - Is it mandatory to showcase the amount of sales our company had during the last twelve months with each VASCUPP Member Institution? Can we skip this portion if we do not have an existing/ previous VASCUPP cooperative contract? Will the proposal be deemed non-responsive if we do not have sales during the last twelve months with each VASCUPP Member Institution?
Answer - A response to the question is required. If the answer is none/zero, indicate that as your answer. Previous sales/experience with a VASCUPP Member Institution is not a requirement for submitting a proposal or being awarded a contract.

25. Question - Please confirm whether the "Secure Research Enclave" category includes CMMC readiness testing? Or, is this category meant for the development/implementation of the architecture for these enclaves?
Answer - Secure Research Enclave could include CMMC readiness or the development/implementation of the architecture for these enclaves.

26. Question - How does JMU define "Consulting Services" and "technology advisor"?
Answer - See RFP *Section IV. Statement of Needs.*

27. Question - Is this a new requirement or an existing requirement?
Answer - This RFP is to replace an existing contract with multiple vendors.

28. Question - What are your Key Performance Indicators?
Answer - Key performance indicators will vary depending on the project.

29. Question - If we have a teaming agreement with a subcontractor, does the subcontractor's experience count as experience for us?
Answer - The experience of a subcontractor specified in a proposal may be considered in the evaluation of the qualifications and experience of the Offeror.

30. Question - Do we need to submit only one response including the price schedule?
Answer - Vendors should submit one (1) original and four (4) copies, and electronic copy in WORD format or searchable PDF (*on a flash drive*) of the entire proposal, INCLUDING ALL ATTACHMENTS. The original, copies, and electronic version should all be the same and include the pricing schedule.

31. Question - As a firm registered on eVA, do we have to pay the fees before the submission of the proposal (i.e. this stage) or after award? Please also clarify that the subcontractor also has to pay this fee.
Answer - eVA fees are only paid upon receipt of a purchase order issued through the eVA system. eVA fees are paid by the vendor listed on the issued purchase order. If a subcontractor is issued a purchase order directly, they would have to pay the associated eVA fees; however, if the purchase order is issued to the prime contractor, and the subcontractor is working under the prime contractor, the subcontractor would not pay the associated eVA fees. The University typically issues purchase orders to the prime contractor.

32. Question - Do we need to submit provided RFP Cover Sheet as a Cover Page of the proposal?
Answer - The RFP cover sheet does not need to be submitted as the cover page of a proposal.

33. Question - Is there any local preference for this contract?
Answer - No.

34. Question - Is it mandatory to have experience with higher education institutions?
Answer - Experience with higher education institutions is not required.

35. Question - Please confirm whether security assessment and consulting services are included on this contract. If so, should we price this under the category "Security and Federation Services" on the Pricing Schedule?
Answer - The scope may include security assessment and consulting services, depending on the specific project. In addition to completing *Attachment D*, Offerors should also provide pricing for all other services.

36. Question - Is there any flexibility in the initial contract duration of one year? Is it safe to assume that the same terms and conditions will remain same when the project is renewed? Are there any pre-defined criteria to be met by the vendors to get the renewal of contract?
Answer - JMU typically issues contracts for one year with subsequent one-year renewals. The terms and conditions of existing term contracts are reviewed at the time of renewal. Contract terms may be negotiated and modified as necessary. See RFP *Section VIII.F.*

37. Question - Can you please specify the list of all technologies in each technology area under Section IV? Example: Do we need to consider Oracle Database, Fusinon Middleware, SOA, BPM, Identity Management, MDM, Webcenter-Sites, Portal, Content, Social, OBIEE, Golden Gate and ODI when you refer to Oracle Core Technologies? Similarly, can you call out all technologies under each area?
Answer – See RFP *Section II. Background.*

38. Question - Can you provide more information about the technologies listed in Section II of the RFP, such as Oracle Core Technologies, PeopleSoft Enterprise Solutions, Microsoft Azure, Okta, etc.? What level of expertise and experience is JMU looking for in these areas?
Answer – The level of expertise and experience required will vary based on the specific project. Offerors should include the qualifications and experience of the personnel who may be assigned to perform work for the University in their proposals (See RFP *Section IV.3.*).

39. Question - What are the expected outcomes of the trainings that a vendor needs to provide to the staff? How much training must be provided in a month? What will be the number of attendees in each session? Will it be a virtual or classroom training?
Answer – Training outcomes, frequency, number of attendees, format, etc. will vary depending on specific training needs and agreed upon SOW.

40. Question - Can you provide more details about the weightage or scoring system that will be used to evaluate proposals based on the criteria stated in the RFP? How will the award decision be made?
Answer - See RFP *Section IV. Evaluation and Award Criteria.* Allocation of points for evaluation criteria will be published to the eVA solicitation posting prior to the closing date and time.

41. Question - Can you provide more information on the Virtual Payables options mentioned? How can vendors and suppliers enroll in these options?
Answer - Offerors may contact the JMU Accounts Payable office, at acctspayable@jmu.edu or (540) 568-7397 to discuss payment enrollment options.

42. Question - Please list all the technologies/tools that needs to be replaced/transformed as part of Reengineering Madison program. Are there specific projects the vendor team will be involved if selected?
Answer - See RFP *Section II. Background.*

43. Question - Does the University anticipate any of its current implementation partners will act as a Systems/Services Integrator and an offeror submitting a proposal in response to this solicitation act as subcontractor if selected?
Answer - No.

44. Question - Are you engaged with any cloud service provider? What is the scope of cloud-based solutions in this RFP?
Answer - See RFP *Section II. Background.*

45. Question - What are your expectations for the level of service that you would like to receive from the IT consulting firm? How would you measure the success of the IT consulting project?
Answer - Expectations and measurements of success will vary depending on the engagement.

46. Question - What are your expectations for the level of security that you would like to have in place?
Answer - JMU follows the ISO standard. When needed other standards are used depending on the need, regulations, requirements, etc.

47. Question - What are the specific challenges that you are facing with your current IT infrastructure compelling to go through Re-engineering Initiative?
Answer - See RFP *Section II. Background.*

48. Question - Could you provide more information about the anticipated scope of special projects where the contractor will serve as a technology expert? What are some examples of these projects and their objectives? Can you elaborate the expected deliverables and milestones for the projects covered in the scope this RFP?
Answer - See RFP *Section II. Background.*

49. Question - Is there any preference for local or regional vendors?
    Answer - No.

50. Question - Is it safe to assume that offsite means offshore?
    Answer - No. For the purpose of this solicitation, offsite means remote work performed not on campus.

51. Question - Resources working offshore need to align with client working hours as per US time zones?
    Answer - Yes.

52. Question - Will JMU provide laptops to the vendor consultants?
    Answer - No.

53. Question - Will any additional travel costs be considered in the pricing?
    Answer - No. See RFP *Section X. Pricing Schedule.*

Signify receipt of this addendum by initialing *"Addendum #2_____"* on the signature page of your proposal.

Sincerely,

Doug Chester
Buyer Senior
Phone: 540-568-4272