

SUBMIT OFFER TO: PURCHASING DEPARTMENT UNIVERSITY OF CENTRAL FLORIDA 12479 RESEARCH PARKWAY, BLDG. 600 ORLANDO, FL 32826 Phone:(407) 823-2661 – Fax (407) 823-5551 www.purchasing.ucf.edu		University of Central Florida INVITATION TO NEGOTIATE Contractual Services Acknowledgement Form	
Page 1 of 32 Pages	OFFERS WILL BE OPENED June 3, 2014		ITN NO: 1325JCSA
		and may not be withdrawn within _____ days after such date and time.	
UNIVERSITY MAILING DATE: May 1, 2014		ITN TITLE: ERP Consulting Services for Implementation and Upgrades for PeopleSoft Applications, PeopleTools and Oracle Software and Hardware	
FEDERAL EMPLOYER IDENTIFICATION NUMBER OR S.S. NUMBER 36-4569832			
VENDOR NAME Solidan Inc.		REASON FOR NO OFFER	
VENDOR MAILING ADDRESS 132 Cypress Dr.			
CITY - STATE - ZIP CODE Bolingbrook – IL - 60440		POSTING OF PROPOSAL TABULATIONS	
AREA CODE 630	TELEPHONE NO. 660-2274	Proposal tabulations with intended award(s) will be posted for review by interested parties at the Purchasing Department, our solicitation web page and the State of Florida's Vendor Bid System and will remain posted for a period of 72 hours. Failure to file a protest within the time prescribed in UCF Regulation 7.130(5) at http://regulations.ucf.edu/chapter7/index.html shall constitute a waiver of proceedings under that regulation.	
	TOLL FREE NO.		
708	FAX NO. 938-5525		

Government Classifications

Check all applicable

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

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

GENERAL CONDITIONS

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

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

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

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

the solicitation mailing list. NOTE: To qualify as a respondent, vendor

AUTHORIZED SIGNATURE (MANUAL)

A handwritten signature in black ink that reads "Dan Moran". The signature is written in a cursive style with a large, sweeping initial "D" and "M".

Dan Moran, President

AUTHORIZED SIGNATURE (TYPED), TITLE

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

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

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

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

Vendors shall submit properly certified original invoices to:

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

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

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

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

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

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

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



UNIVERSITY OF CENTRAL FLORIDA

INVITATION TO NEGOTIATE (ITN) NUMBER 1325JCSA

FOR

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

TABLE OF CONTENTS

1.0 INTRODUCTION

1.1	Statement of Objective.....
1.2	Contract Award.....
1.3	UCF Environment.....

2.0 GENERAL CONDITIONS

2.1	Authorized UCF Representative/Public Notices/UCF Discretion....
2.2	Approximate Calendar of Events.....
2.3	Respondent Communications and/or Inquiries.....
2.4	Respondent's Conference and Site Visit.....
2.5	Written Addenda.....
2.6	Offer Due/Opening Date.....
2.7	Section Not Used.....
2.8	Evaluation Criteria and Selection Process.....
2.9	Posting of Recommended Selection.....
2.10	Offer Validity Period.....
2.11	Disposition of Offer/Florida Public Records Law Compliance.....
2.12	Economy of Presentation.....
2.13	Restricted Discussions/Submissions.....
2.14	Verbal Instructions Procedure.....
2.15	State Licensing Requirements.....
2.16	Parking.....
2.17	Definitions.....
2.18	Procurement Rules.....
2.19	Force Majeure.....
2.20	Limitation of Remedies, Indemnification, and Insurance.....
2.21	Term of Contract.....
2.22	Termination of Contract.....
2.23	Assignment and Amendment of Contract.....
2.24	Independent Parties.....
2.25	Performance Investigations.....
2.26	Records.....
2.27	Public Records.....
2.28	Public Record, Contract For Services.....
2.29	Severability.....
2.30	Notices.....
2.31	Governing Law and Venue.....
2.32	Liaison.....
2.33	Subcontracts.....
2.34	Employment of UCF Personnel.....
2.35	Conflict of Interest.....
2.36	Equal Opportunity Statement.....
2.37	Waiver of Rights and Breaches.....
2.38	Headings Not Controlling.....
2.39	Employee Involvement/Covenant Against Contingent Fees.....
2.40	Employment of Aliens.....
2.41	Site Rules and Regulations.....
2.42	Travel Expenses.....

2.43 Annual Appropriations.....
2.44 Taxes.....
2.45 Contractual Precedence.....
2.46 Use of Contract by Other Government Agencies.....
2.47 Public Entity Crimes.....
2.48 Work for Hire.....
2.49 Export Control.....
2.50 Nonnegotiable Conditions and Requirements.....

3.0 REQUIRED OFFER FORMAT

3.1 Introduction.....
3.2 Offer Sections.....

4.0 OTHER REQUIREMENTS.....

APPENDIX I	EVALUATION SCORING SHEET
APPENDIX II	TERMS AND CONDITIONS
APPENDIX III	CERTIFICATE OF NON-SEGREGATED FACILITIES
APPENDIX IV	COMPLIANCE AND CERTIFICATION OF GOOD STANDINGS

1.0 INTRODUCTION

1.1 Statement of Objective

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

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

1.2 Contract Award

- A. UCF intends to award a contract or contracts resulting from this solicitation to the responsible Respondent(s) whose offer represents the best value after evaluation in accordance with the criteria in this solicitation.
- B. UCF may reject any or all offers if such action is in UCF's best interest.
- C. UCF may waive informalities and minor irregularities in offers received.
- D. UCF reserves the right to evaluate an offer and award a contract without negotiations.
Therefore, the offerer's initial offer should contain the offerer's best terms from a cost or price and technical standpoint.
- E. UCF reserves the right to conduct negotiations with the highest ranked offerer(s).
- F. UCF reserves the right to make an award on any item for a quantity less than the quantity offered, at the unit cost or prices offered, unless the respondent specifies otherwise in the offer.
- G. UCF reserves the right to make multiple awards if, after considering the additional administrative costs, it is in UCF's best interest to do so.
- H. A written notice of award will be sent to the successful respondent(s).

1.3 UCF Environment

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

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

UCF's 1,415-acre main campus provides modern facilities, most of which have wireless connectivity, with 600 acres set aside for lakes, woods and an arboretum. UCF has 12 colleges, including the newly

established College of Medicine. More than 60,000 students attend classes on UCF's main campus and its 9 regional campuses located throughout Central Florida. UCF has granted more than 250,000 degrees in its 45 years of offering classes.

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

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

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

2.0 GENERAL CONDITIONS

2.1 Authorized UCF Representative/Public Notices/UCF Discretion

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

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

Advance notice of public meetings regarding this ITN, if UCF determines at its sole discretion whether any such meetings will be held, will be in writing and posted in UCF's Purchasing Department, 12479 Research Parkway. Additionally, any portion of a meeting at which a negotiation with a vendor is conducted pursuant to a competitive solicitation at which a vendor makes an oral presentation or at which a vendor answers questions is exempt from s. 286.011 and s. 24(b), Art. I of the State Constitution. This also includes any portion of a team meeting at which negotiation strategies are discussed. All such meetings shall be conducted in accordance with Chapter 286 of the Florida Statutes. UCF also reserves the right and sole discretion to REJECT any offer at any time on grounds that include, without limitation, either that an offer is nonresponsive to the ITN or is incomplete or irregular in any way, or that a responsive offer is not in UCF's best interest.

2.2 Approximate Calendar of Events

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

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

2.3 Respondent Communications and/or Inquiries

- A. UCF is not liable for interpretations/misinterpretations or other errors or omissions made by the Respondent in responding to this ITN. The Respondent shall examine this ITN to determine if UCF's conditions and requirements are clearly stated. If, after examination of the various conditions and requirements of this ITN, the Respondent believes there are any conditions or requirements which remain unclear or which restrict competition, the Respondent may request, in writing, that UCF clarify or change condition(s) or requirement(s) specified by the Respondent. The Respondent must provide the Section(s), Subsection(s), and Paragraph(s), that identify the conditions or requirements questioned by the Respondent. The Respondent also must provide detailed justification for a change, and must recommend specific written changes to the specified condition(s) or requirement(s). Requests for changes to this ITN must be received by UCF not later than the date shown in Section 2.2., entitled "Calendar of Events," for the submittal of written communications and/or inquiries. UCF shall not make any changes to any of the non-negotiable terms and conditions. The non-negotiable terms and conditions are indicated on Appendix II. Requests for changes to the non-negotiable provisions of this ITN shall automatically be rejected. Requests for changes to anything other than the non-negotiable provisions of this ITN may or may not be accepted by UCF and may or may not be negotiated by UCF, all at UCF's sole discretion.
- B. Any Respondent disagreeing with any terms and conditions set forth in this ITN shall indicate on Appendix II, Terms and Conditions Supplemental Offer Sheet, the specific ITN section(s) the Respondent disagrees with and shall provide a clear and detailed reason for the disagreement and a solution to the disagreement, in his/her offer, all PRIOR TO the deadline stated in Section 2.2 "Calendar of Events." UCF may or may not accept or agree to negotiate any of the terms and conditions that Respondents indicated as disagreeing with, all at UCF's sole discretion. The indication of disagreement with any non-negotiable terms and conditions shall be automatically rejected.
- C. Failure to submit Appendix II and clearly indicating which terms and conditions the Respondent agrees and disagrees with (i.e. failure to initial the designated sections set forth on Appendix II, indicating that the Respondent has either understood and agreed to or disagreed with each particular section listed on Appendix II) and/or clear and detailed reasons for the disagreement, with the offer, all prior to the deadline stated in Section 2.2. "Calendar of Events," shall be grounds for rejection of that offer, at UCF's sole discretion. UCF may or may not accept and/or negotiate any such terms and conditions that the Respondent disagreed with. If UCF decides not to accept any of the terms and conditions the Respondent disagreed with, UCF shall have the right, at UCF's sole discretion to exercise its right to reject the tentative awardee's offer and proceed to the next highest ranked respondent. As noted above, the disagreement with any non-negotiable terms and conditions by the

Respondent shall be automatically rejected.

- D. UCF shall at its sole discretion determine what requested changes to this ITN and the resulting agreement are acceptable. Non-negotiable terms and conditions, as indicated on Appendix II will always stay as they are and any requested changes to such clauses shall automatically be rejected. UCF shall issue an Addendum reflecting the acceptable changes to this ITN, if any, which shall be sent to all Respondents as specified in Section 2.1.
- E. Any communications, questions and/or inquiries from the Respondent concerning this ITN in any way must be submitted in writing to the individual identified in Section 2.1 not later than **May 15, 2014 at 2:00 p.m.** Eastern Time as set forth in the Calendar of Events. Written inquiries must be legible and concise and must clearly identify the Respondent who is submitting the inquiry.

2.4 Respondents' Conference and Site Visit

None

2.5 Written Addenda

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

2.6 Offer/Proposal Opening Date

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

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

Offers will be accepted up to, and no offers may be withdrawn after, the deadline for offer submission time and date shown above. Offers must be delivered in sealed envelopes clearly marked: **ITN1325JCSA ERP Consulting Services for Implementation and Upgrades for PeopleSoft Applications, PeopleTools and Oracle Software and Hardware.** The offer must be submitted with seven (7) copies; one hard copy and six (6) electronic versions on either disc or thumb drive. The hard one copy needs to contain original signatures of the Respondent's authorized representatives on the document titled "INVITATION TO NEGOTIATE ACKNOWLEDGMENT FORM (Form ITN/CS)." All copies of proposals whether they are electronic or hard copy must be complete sets in every way, with all information the proposer desires to be evaluated. UCF will not be responsible for any proposal's low score during the evaluation process that results from any of the proposals (hard or

electronic copy) having incomplete information and or omitted documents. UCF will not be responsible for making copies of any omitted or missing documents to complete any submitted proposal.

2.7 Section Not Used

2.8 Evaluation Criteria and Selection Process

- A. UCF reserves the right to conduct negotiations if the decision maker (Vice President/Dean or his/her written designee(s) with the advice and consent of the Purchasing Director determines negotiations to be in the best interest of the university. Any portion of a meeting at which a negotiation with a vendor is conducted pursuant to a competitive solicitation is exempt from s. 286.011 and s. 24(b), Art. I of the State Constitution. Discussions with vendors after receipt of an offer do not constitute a rejection, counteroffer or acceptance by UCF.
- B. UCF reserves the right to conduct negotiations with the highest ranked offerer(s). In the event the decision maker determines it to be in UCF's best interest to enter into negotiations, he/she after receiving the advice and consent of the Purchasing Director shall:
1. Establish an evaluation committee tailored for the particular acquisition that includes appropriate expertise to ensure a comprehensive evaluation of offers. The committee will review all responsive offers and develop a ranked order of vendors based on the points given each evaluation criteria contained herein;
 2. Develop the acquisition plan (strategy to award with or without negotiations) after review of offers;
 3. Ensure consistency among the solicitation requirements, notices to respondents, offer preparation instructions, evaluation criteria, solicitation provisions or contract clauses, and data requirements;
 4. Ensure that offers are evaluated based solely on the evaluation criteria contained in the solicitation;
 5. Consider the recommendations of the evaluation committee in determining which offerer(s) to enter into negotiations; and
 6. Select the negotiation team. This can be the evaluation team or any other individual(s) the decision maker deems necessary for the acquisition. The negotiation team will invite the highest ranked offerer(s) falling within the desired competitive range to enter into negotiations.
- C. All offers shall be initially evaluated based on weighted criteria set forth in the table below by members of an evaluation committee. Such committee shall consist of three (3) or more individuals who have expertise regarding, or some experience with, the subject matter of the ITN or, if none, then individuals who could be characterized as recipients, beneficiaries, or users of the ITN's subject matter. The Chief Technology Officer or his/her written designee(s) will appoint the evaluation committee members. Committee members, at the discretion of the Chief Technology Officer or his/her written designee(s), shall have the option to meet as a group any time during formulation of the specifications and solicitation stage to discuss and correct any concerns and ambiguities of the solicitation and specifications. This privilege shall be rescinded upon opening of the offers. After offer opening, each evaluation committee member shall function independently of all other persons including, without limitations, the other committee members, and, throughout the entire evaluation process, each evaluation committee member is strictly prohibited from meeting with or otherwise discussing this ITN and any aspect thereof including, without limitation, the offers and their content with any other individual whatsoever. Each evaluation committee member shall conduct an independent evaluation of the offers in accordance with the weighted evaluation criteria set forth in the following Table A:

Table A – Evaluation of Responses

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

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

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

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

2.9 Posting of Recommended Selection

Intent to award will be posted within a reasonable time when the Purchasing Department receives the decision maker’s notice of recommended award decision.. The recommendation to award a contract, if

any, to a Respondent(s) to this ITN will be posted for review by interested parties in the Purchasing Department and will remain posted for a period of seventy-two (72) hours (three (3) business days).

- A. If the Respondent desires to protest the recommendation to award a contract, if any, the Respondent must file with UCF:
 - 1. A written notice of intent to protest within seventy-two (72) hours (three (3) business days) of the posting of the recommended award. UCF shall not extend or waive this time requirement for any reason whatsoever.
 - 2. A formal written protest by petition within ten (10) calendar days of the date on which the notice of intent to protest is filed. UCF shall not extend or waive this time requirement for any reason whatsoever.
- B. Failure to file in writing either a notice of intent to protest or a formal protest by petition within the time prescribed in UCF Regulation 7.130(5), shall constitute a waiver of proceedings under that regulation.
- C. A formal written protest by petition must be accompanied by a Protest Bond payable to UCF in the amount of \$10,000 or 10% of UCF's estimate of the total value of the offered contract, whichever is less. The form of the Protest Bond shall be a cashier's check or money order made payable to UCF.
- D. In addition to all other conditions and requirements of this ITN, UCF shall not be obligated to pay for information obtained from or through the Respondent.

2.10 Offer Validity Period

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

2.11 Disposition of Offers; Florida Public Records Law Compliance

All offers become the property of the State of Florida, and the State of Florida shall have the right to use all ideas, and/or adaptations of those ideas, contained in any offer received in response to this solicitation. Any parts of the offer or any other material(s) submitted to UCF with the offer that are copyrighted or expressly marked as "confidential", "proprietary", or "trade secret", will only be exempted from the "open records" disclosure requirements of Chapter 119, Florida Statutes, if Florida law specifically recognizes these materials as exempt from disclosure. Thus, the mere designation as "confidential", "proprietary", or "trade secret" by a vendor does not ensure that such materials will be exempt from disclosure. In the absence of a specific Florida statute exempting material from the public records law, UCF is legally obligated to produce any and all public records produced or received in the course of conducting university business, irrespective of any designation by the vendor of those same records as "confidential", "proprietary", or "trade secret." The ultimate determination of whether a vendor's claim of "confidential," "proprietary" or "trade secret" will support an exemption from disclosure will be made by UCF or, potentially, a court. UCF's selection or rejection of an offer will not affect this provision.

2.12 Economy of Presentation

Each offer shall be prepared simply and economically, providing a straightforward, concise description of the Respondent's capabilities to satisfy the conditions and requirements of this ITN. Fancy bindings, colored displays, and promotional material are not desired. Emphasis in each offer must be on completeness and clarity of content. To expedite the evaluation of offers, it is **mandatory** that Respondents follow the format and instructions contained herein. UCF is not liable for any costs

incurred by any Respondent in responding to this ITN including, without limitation, costs for oral presentations requested by UCF, if any.

2.13 Restricted Discussions/Submissions

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

2.14 Verbal Instructions Procedure

No negotiations, decisions, or actions shall be initiated or executed by the Respondent as a result of any discussions with any UCF employee. Only those communications that are in writing from the authorized UCF representative identified in Section 2.1. of this ITN that have been approved in writing by UCF's President or the President's designee shall be considered as a duly authorized expression on behalf of UCF. Only communications/inquiries from the Respondent that are signed in writing and delivered on a timely basis, i.e., not later than 5:00PM on May 20, 2014, will be recognized by UCF as duly authorized expressions on behalf of the Respondent.

2.15 State Licensing Requirements

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

2.16 Parking

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

2.17 Definitions

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

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

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

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

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

2.18 Procurement Rules

- A. UCF has established for purposes of this ITN that the words "shall", "must", or "will" are equivalent in this ITN and indicate a mandatory requirement or condition, the material deviation from which shall not be waived by UCF. UCF will, at UCF's sole discretion, determine whether a deviation is material. Any deviation found by UCF to be material shall result in the rejection of the offer.
- B. The words "should" or "may" are equivalent in this ITN and indicate very desirable conditions, or requirements but are permissive in nature. Deviation from, or omission of, such a desirable condition or requirement will not in and of itself cause automatic rejection of a offer, but may result in the offer being considered as not in the best interest of UCF. UCF will, at UCF's sole discretion, determine whether an offer is considered as not in the best interest of UCF and may or may not reject the offer, all at UCF's sole discretion.
- C. The Respondent must comply with the instructions cited in Section 2.3. Also, the Respondent must initial the designated sections set forth on Appendix II, indicating that the Respondent has either understood and agreed to or disagreed with each particular section listed on Appendix II. Failure to submit Appendix II with each area marked as set forth above and initialed by the Respondent shall constitute grounds for rejection of the offer by UCF and shall give UCF the right to reject the offer, at UCF's sole discretion.
- D. The Respondent is solely responsible for the accuracy and completeness of its offer. The Respondent's errors or omissions, if any, are solely at the risk of the Respondent and may be grounds for rejection of the offer and shall give UCF the right to reject the offer, at UCF's sole discretion.

2.19 Force Majeure

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

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

2.20 Limitation of Remedies, Indemnification, and Insurance

- A. The Attorney General of the State of Florida has rendered an opinion that agencies of the State of Florida cannot contractually limit the State's right to redress. Consequently, any offer by Respondent to limit the Respondent's liabilities to the State or to limit the State's remedies against the Respondent is unacceptable and will result in the REJECTION of the Respondent's offer.
- B. As an agency of the State of Florida, UCF's liability is regulated by Florida law. Except for its' employees acting within the course and scope of their employment, UCF shall not indemnify any entity or person. The State of Florida is self-insured to the extent of its liability under law and any liability in excess of that specified in statute may be awarded only through special legislative action. Accordingly, UCF's liability and indemnification obligations under this ITN and the resulting contract, if any, shall be effective only to the extent required by Florida law; and any provision requiring UCF to provide insurance coverage other than the State of Florida self-insurance shall not be effective.
- C. Respondent(s)/Vendor(s)/Payee(s)/Offerer(s) shall hold the University and the UCF Board of Trustees and the University's officers, employees, agents and/or servants harmless and indemnify each of them against any and all liabilities, actions, damages, suits, proceedings, and judgments from claims arising or resulting from the acts or omissions of Respondent(s)/Vendor(s)/Payee(s)/Offerer(s), its employees, its agents or of others under Respondent's/Vendor's/Payee's/Offerer's control and supervision. If any part of a delivery to the University pursuant to a contract resulting from this ITN is protected by any patent, copyright, trademark, other intellectual property right or other right, Respondent/Vendor/Payee/Offerer also shall indemnify and hold harmless the University and the UCF Board of Trustees and the University's officers, employees, agents and/or servants from and against any and all liabilities, actions, damages, suits, proceedings and judgments from claims instituted or recovered against the University by any person or persons whomsoever on account of the University's use or sale of such article in violation of rights under such patent, copyright, trademark, other intellectual property right or other right.

For all purchases of \$10,000 or below, Respondent/Vendor/Payee/Offerer will have and maintain types and amounts of insurance that at a minimum cover the Respondent's/Vendor's/Payee's/Offerer's (or subcontractor's) exposure in performing a contract resulting from this ITN. For all purchases that exceed \$10,000 (i.e. \$10,000.01 and up) and/or all purchases that require a UCF Safe Form, Respondent/Vendor/Payee/Offerer will have and maintain general liability insurance of one (1) million dollars and Respondent/Vendor/Payee/Offerer shall send a copy of his/her insurance certificate (prior to commencement of his/her performance or delivery hereunder) to the following address by email, fax or mail:

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

UCF has the right to deviate from any of the above insurance requirements, if UCF, at UCF's sole discretion decides to do so. If UCF decides to deviate from the above noted insurance requirements,

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

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

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

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

2.21 Term of Contract

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

2.22 Termination of Contract

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

2.23 Assignment and Amendment of Contract

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

2.24 Independent Parties

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

2.25 Performance Investigations

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

2.26 Records

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

2.27 Public Records

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

2.28 Public Record, Contract For Services

- A. Keep and maintain public records that ordinarily and necessarily would be required by the public agency in order to perform the service.
- B. Provide the public with access to public records on the same terms and conditions that the public agency would provide the records and at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes, or as otherwise provided by law.
- C. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law.
- D. Meet all requirements for retaining public records and transfer, at no cost, to the public agency all public records in possession of the contractor upon termination of the contract and destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the public agency in a format that is compatible with the information technology systems of the public agency.

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

2.29 Severability

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

2.30 Notices

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

2.31 Governing Law and Venue

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

2.32 Liaison

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

2.33 Subcontracts

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

2.34 Employment of UCF Personnel

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

2.35 Conflict of Interest

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

2.36 Equal Opportunity Statement

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

- A. The provisions of Executive Order 11246, September 24, 1965, as amended by Executive Order 11375, and the rules, regulations and relevant orders of the Secretary of Labor that are applicable to each order placed against the contract resulting from this ITN, if any, regardless of value.
- B. The Respondent, if any, awarded a contract under this ITN shall agree to comply with the Americans with Disabilities Act (ADA) of 1990.
- C. If the Respondent anticipates receiving \$10,000 in orders during the first 12 months of the contract, if any, resulting from this ITN, Respondent must complete a Certificate of Non-Segregated Facilities form and attach the form to the offer. A sample certificate is attached as **APPENDIX III**.
- D. If the Respondent anticipates receiving \$50,000 in orders during the first 12 months of the contract, if any, resulting from this ITN, and employs more than 50 people, the Respondent must complete and file prior to March 1 of each year a standard form 100 (EEO-1).
- E. If the Respondent anticipates receiving \$50,000 in orders during the first 12 months of the contract, if any, resulting from this ITN, and employs more than 50 people, the Respondent must maintain a written program for affirmative action compliance that is accessible for review upon request by UCF.
- F. Respondents shall identify their company's government classification at time of offer submittal (See UCF Form ITN/CS: ITN acknowledgement cover page). Respondent's identity will not foster special consideration during this ITN process; this is only for informational purposes for reporting.

2.37 Waiver of Rights and Breaches

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

2.38 Headings Not Controlling

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

2.39 Employee Involvement/Covenant Against Contingent Fees

In accordance with Section 112.3185, Florida Statutes, the Respondent hereby certifies that, to the best of its knowledge and belief, no individual employed by the Respondent or subcontracted by the Respondent has an immediate relationship to any employee of UCF who was directly or indirectly involved in any way in the procurement of the contract, if any, resulting from this ITN or goods or

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

2.40 Employment of Aliens

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

2.41 Site Rules and Regulations

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

2.42 Travel Expense

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

2.43 Annual Appropriations

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

2.44 Taxes

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

2.45 Contractual Precedence

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

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

2.46 Use of Contract by Other Governmental Agencies

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

2.47 Public Entity Crimes

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

2.48 Work For Hire

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

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

The Payee hereby represents and warrants that, (a) all applicable laws, rules and regulations have been complied with, (b) the Payee is free and has full right to enter into this P.O. and perform all of its obligations hereunder, (c) the Materials may be used or reproduced for advertising or trade purposes or

any commercial purposes without violating any laws or the rights of any third parties and (d) no third party has any rights in, to, or arising out of, or in connection with the Materials, including without limitation any claims for fees, royalties or other payments.

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

2.49 Export Control:

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

The Parties agree that the Payee will not provide the University with any ITAR or EAR restricted technology and/or related data, and that any ITAR or EAR restricted technologies and/or data produced in furtherance of a contract resulting from this ITN will be in the exclusive possession of the Payee and at no time will any export controlled technologies, related data, or information be intentionally or inadvertently transferred to the University, its facilities, labs, staff, researchers, employees, officers, agents, servants or students in the performance of such a contract.

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

2.50 Nonnegotiable Conditions and Requirements

The University seeks to award a contract from this ITN that complies with applicable law and will be both fair and reasonable to all parties, protecting the best interest of the University, its Board of Trustees, faculty, staff and students. With that goal in mind, we have developed a list of terms and conditions that are either required by law and are thus non-negotiable or have been deemed to be important to the University's interests and are thus non-negotiable. Any discussions seeking to alter or remove such a term or condition from any contract resulting from this ITN shall not be granted to any Respondent. The non-negotiable terms and conditions are listed on Appendix II of this document, and identified with ****non-negotiable****. Respondents that disagree with any of those "non-negotiable" terms

and conditions should forego submitting an offer because said offer shall be rejected as nonresponsive to this ITN. Failure to submit Appendix II with the offer constitutes grounds for rejection of the offer and UCF shall have the right to reject said offer, at UCF's sole discretion.

3.0 REQUIRED OFFER FORMAT

3.1 Introduction

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

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

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

3.2 Respondent/Offer Submittal Sections

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

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

1. Please provide an overview and history of your company, and experience in providing consulting and advisory services similar in scope to those requested in section 1.1.
2. The proposer shall provide a list of current or recent similar-type client accounts, if any, which are located in the United States. Client account information shall include contact name, address, phone number, email address, and length of service.
3. Please provide a list of client accounts lost through early termination or non-renewal over the past five (5) years. Include contact name, phone number, email address and length of service at each account, and reason for loss.
4. The Proposer shall provide a chart of the company's organization and a description of its corporate structure and chain of ownership of company to ultimate parent corporation, and all subsidiaries.
5. Provide the number of years' experience in providing services as described in section 1.1.

B. Services Offered

1. List the total number of employees, include job titles and experience of individual(s) who would be available to the UCF account; please include resume(s).
2. Clearly identify the skill sets your staff is capable of providing, and clearly indicate if subcontractors or sub-consultants will be used.

C. Consulting Scope and Cost to University

1. Demonstrate an understanding of the services the university requires under this contract.
2. Explain the methodology the proposer will employ to fulfill the requirements discussed in section 1.1 while maintaining project scope and cost.
3. The proposal shall specify billing rates for the various personnel who will be involved in the activities.
4. Describe in detail the costs to UCF under the terms of an agreement, if any, resulting from this ITN. A separate Statement of Work (SOW) agreement will be issued for selected services and quantity of hours after vendor selections are made. Include information about variable costs including travel.

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

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

E. Demonstrated Ability to Meet Requested Project Time Lines

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

4.0 OTHER REQUIREMENTS

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

**APPENDIX I EVALUATION
SCORING SHEET**

NAME OF RESPONDENT COMPANY Solidan Inc.

INSTRUCTIONS TO EVALUATION COMMITTEE MEMBER:

1. Evaluate each offer on a separate form.
2. Work independently and do not discuss the Offers or your evaluation with anyone.
3. When the forms are completed, sign, date and deliver them in a **sealed envelope** to the **Purchasing Representative named in section 2.1.**

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

EVALUATOR'S NAME _____

EVALUATOR'S SIGNATURE _____

DATE _____

**APPENDIX II SUPPLEMENTAL
OFFER SHEET TERMS AND
CONDITIONS**

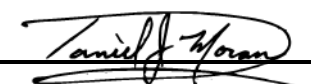
The sections set forth below must each be initialed, as YES for "understood and agreed upon" or NO for "not agreed to." Failure to complete and return this document with your offer could result in rejection of your offer, at UCF's sole discretion. Respondents shall not check sections as "understood and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

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

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

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

RESPONDENT COMPANY NAME Solidan Inc.

AUTHORIZED SIGNATURE 

TITLE President

DATE 6/2/2014

APPENDIX III

CERTIFICATE OF NON-SEGREGATED FACILITIES

We, Solidan Inc. _____ certify to the

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

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

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

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

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

APPENDIX III

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

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

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


- (1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, or national origin. Such action shall include, but not be limited to the following: employment, upgrading demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of this nondiscrimination clause.
- (2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex or national origin.
- (3) The contractor will send to each labor union or representative of workers with which the contractor has a collective bargaining agreement or other contract or understanding, a notice, to be provided by the agency contracting officer, advising the labor union or worker's representative of the contractor's commitments under Section 202 of Executive Order No. 11246 of September 24, 1965, and shall post copies of notice in conspicuous places available to employees and applicants for employment.
- (4) The contractor will comply with all provisions of Executive Order No. 11246 of September 24, 1965 and of the rules, regulations, and relevant orders of the Secretary of Labor.
- (5) The contractor will furnish all information and reports required by Executive Order No. 11246 of September 24, 1965, and by the rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the contracting agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations and orders.
- (6) In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of such rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts in accordance with procedures authorized in Executive Order No. 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoiced as provided in Executive Order No. 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.
- (7) The contractor will include the provision of Paragraphs (1) through (7) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to Section 204 of Executive Order No. 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or

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

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

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

RESPONDENT COMPANY NAME Solidan Inc.

AUTHORIZED SIGNATURE  _____

TITLE President

DATE 6/2/2014

APPENDIX IV

COMPLIANCE AND CERTIFICATION OF
GOOD STANDINGS

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


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

CERTIFICATION

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

Company: Solidan Inc.

Authorized Representative's Name: Dan Moran

Authorized Representative's Signature:  _____

Date: 6/2/2014



University of Central Florida | ITN 1325JCSA
ERP Consulting Services for Implementation and Upgrades for
PeopleSoft Applications, PeopleTools and Oracle Software and Hardware

PROPOSAL TO

UNIVERSITY OF CENTRAL FLORIDA

PURCHASING SERVICES

INVITATION TO NEGOTIATE

ITN NO: 1325JCSA

DATE: JUNE 2, 2014



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

Dear Ms. Jones,

Enclosed is a copy of Solidan Incorporated response to the ITN **1325JCSA**. Solidan would like to be considered as one of the staff augmentation vendors for the University of Central Florida PeopleSoft/Oracle systems. The content of this submission contains all of the information requested by the University of Central Florida.

Solidan agrees to all Proposal Requirements found in the ITN **1325JCSA**, and understands and accepts the contractual terms and conditions within. Solidan understands the RFP and all of its specifications and any vendor responses to these specifications will automatically be incorporated into any contract resulting from this solicitation. Solidan also understands that all representations made in the proposal will be binding upon the vendor, Solidan Inc.

The primary contact for this RFP is Dan Moran, whose contact information is listed below.

Thank you for your time and consideration,

Sincerely,

A handwritten signature in black ink that reads "Daniel J. Moran". The signature is written in a cursive style with a large, sweeping initial 'D' and 'M'.

Dan Moran

Primary Contact for Solidan Incorporated

Dan Moran

Busn: 630-660-2274

Email: dmoran@solidan.net



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

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

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

Solidan was started in 2004 to provide higher education institutions greater value in terms of quality in consulting services and advisory services. We have worked at private universities, public universities, community colleges, medical schools, law schools, and large multi-campus and multi-institution universities. We assist universities with functional, technical, project management, reporting, business process redesign, and other various needs.

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

CUNY -- 7 months

Joseph Sierra

Joseph.sierra@cumy.edu

Phone: (347)852-0164

Moody Bible Institute -- Multiple Engagements – 8 months

Jon Saucedo

john.saucedo@moody.edu

phone: (312) 329-2286

Loyola University -- 24 months

Larry Adams Manager App Development System Integration

ladams@luc.edu

phone: (773) 508-7636

RIT-- Rochester institute of Technology – 13 months

Colleen Peterson -- Senior Associate Director of Admissions

cfpadm@rit.edu

phone: (585) 475-6631

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

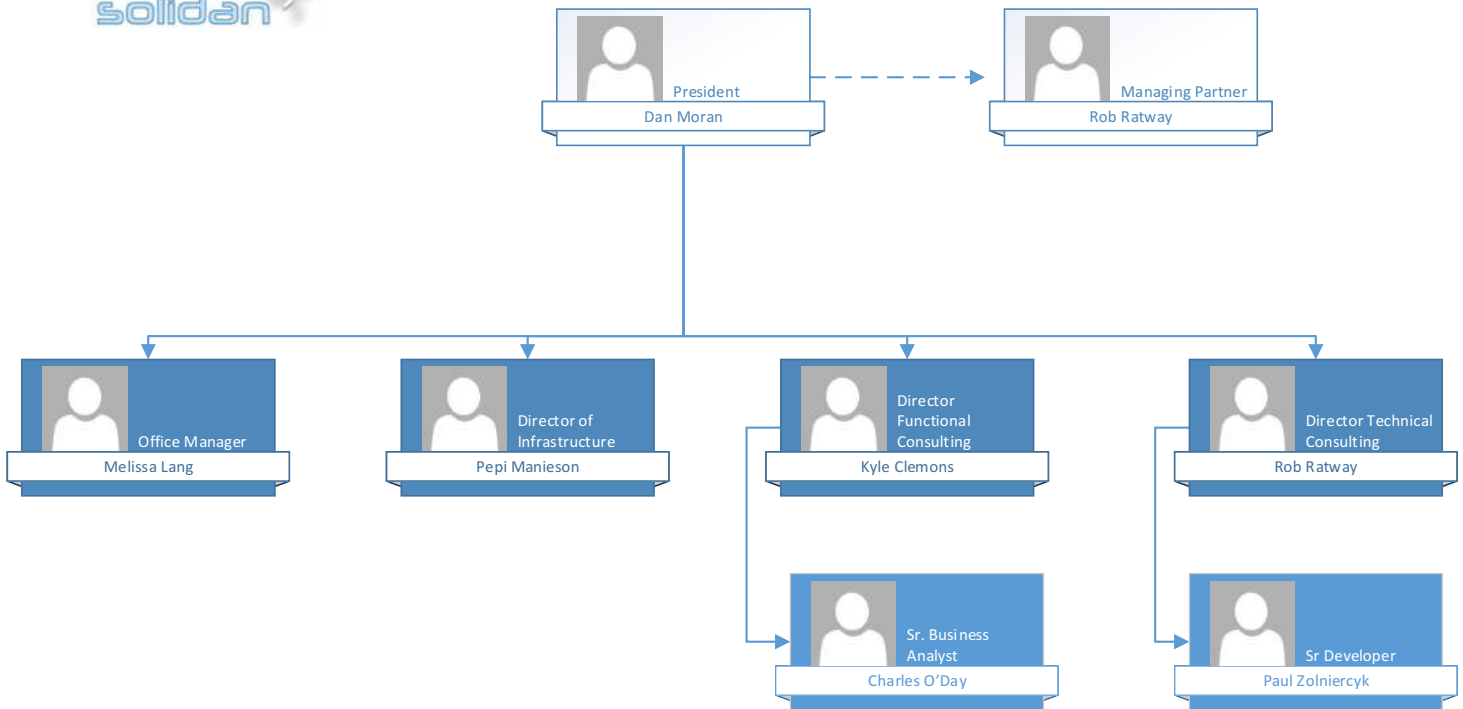
Not applicable. Solidan prides itself on providing high quality services that exceed customer expectations.

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

Solidan Inc. is an S-Corp registered in Illinois and is privately held. The company is owned 100%



by the president and does not have a parent corporation or subsidiaries. Please see the attached organizational chart.



Solidan 2014 Org Chart

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

Solidan Inc. has been in business since 2004. This is approximately 10 years providing, as a company, PeopleSoft and Oracle consulting services to the higher education greater community. Each of our partners have greater than 10 years providing services.

B. Services Offered



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

We have 6 core team members. Please see org chart and resumes for complete listing of titles and experience.

In addition to our core team, we have provided a list of resumes for resources that we have previously worked with. We have resources with experience completing the HR/SA split. We have worked at schools that are split, combined, and even using non-Oracle HR products. We also have worked with the Oracle Mobile product.

See appendix I for resumes.

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

Solidan Inc. is capable of providing resources in the following areas, but not limited to:

Project Manager, PeopleSoft Functional, PeopleSoft Developer, PeopleSoft Admin, PeopleSoft DBA, PeopleSoft Security, Oracle OBIEE Reporting, UPK Training, Data Entry, Testing

Solidan Inc. is a small firm that uses corp to corp and 1099 sub-contractors as needed. We only provide resources that one of our employees has previously been on a project with. This ensures vetting has already been completed and sub-contractors can have an immediate impact on the success of the project.



C. Consulting Scope and Cost to University

1. Demonstrate an understanding of the services the university requires under this contract.
2. Explain the methodology the proposer will employ to fulfill the requirements discussed in section 1.1 while maintaining project scope and cost.
Our consultants have ate, slept, and breathed PeopleSoft for countless years. We have been in the trenches, struggled through tough times, and conquered the most difficult projects. We have been trained in PMI, Agile, other standards, and most importantly the "school of hard knocks". There is no replacement for outright experience on projects, whether they be good, bad, or ugly.
4. The proposal shall specify billing rates for the various personnel who will be involved in the activities.
See below chart.
5. Describe in detail the costs to UCF under the terms of an agreement, if any, resulting from this ITN. A separate Statement of Work (SOW) agreement will be issued for selected services and quantity of hours after vendor selections are made. Include information about variable costs including travel.

All costs are fixed. We prefer to be on-site collocated with our counter parts or constituents. This is how we can function most efficiently and knowledge transfer at a high level. We are also conscientious of the price of travel. We normally attempt to give you resources within a reasonable distance, but will provide the right resources that fit the current need. We can accommodate remote work on a case by case basis.

Resource Position	Rate	Expenses
Project Manager	155	35*
PeopleSoft Functional	150	35*
PeopleSoft Architect	150	35*
PeopleSoft Developer	135	35*
PeopleSoft Admin	125	35*
PeopleSoft DBA	125	35*
PeopleSoft Security	135	35*
Oracle OBIEE Reporting	150	35*
UPK Training	120	35*

*expense costs can be charged at an hourly rate or consultants can provide actual expenses incurred.

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



1. Proposers addressing the systems administrator functions or the database administrator functions as described in section 1.1 must provide a list of current or very recent clients and projects explaining the system architecture and the project scope.
We currently have resources staffed at CUNY and Harvard University. CUNY is the largest implementation of Campus Solutions. We also have resources at a private company rolling out Financials for a global organization.
2. Proposers addressing the systems administrator functions, the database administrator functions and application functions as described in section 1.1 must provide a list of current or recent clients and projects explaining integrations with third party application and the project scope.
We have an awesome integration that we have recently completed with ECSI. This is a custom solution that is mainly based on XML, XSL, and javascript code that integrates with a third party provider for credit card processing for self-service and cashiering. It utilizes handler code in app packages for integrations through the integration broker gateway. We host our own virtual/physical servers to support this effort. This was an initial 6 month engagement that is currently adding on new functionality.
3. Proposers addressing the PeopleSoft application and tools functions as described in section 1.1 above must provide a list of current or very recent clients and projects explaining integrations with third party application and the project scope.
Our DBA has created multiple VM environments for Campus Solutions. We are running the newest PeopleTools 8.53. We are also in the process of integrating with Amazon Web Services. Our developers have all of the newest tools available, but have also been around long enough to work on Cobol and SQR.

E. Demonstrated Ability to Meet Requested Project Time Lines

1. Proposer must provide a list of current or recent similar-type projects as described in section 1.1 demonstrating their ability to estimate adequate resources and accurate timelines with successful deliverables.
As stated previously, Solidan only provides proven resources. We do consider all the great methodologies of our bigger competitors, but when it comes down to a successful project.... Nothing beats having top notch resources.



Appendix I. Resumes

DANIEL MORAN
PEOPLESOFT CONSULTANT

ARCHITECT

EXECUTIVE SUMMARY

Mr. Daniel Moran has over 10 years of PeopleSoft implementation, upgrade, and support experience in the Public Sector. He is an organized, analytical professional with strategic perspective and the ability to identify problems and implement innovative solutions to ensure successful business programs. With a history of working in various sized companies, Mr. Daniel Moran has acquired a multitude of skills ranging from requirements gathering, business analysis, functional design, technical design, development, quality analysis, and project management. His specific PeopleSoft experience includes fit gap, SQR development, page/panel development, report development, and production analysis. He has worked in the CRM space in the retail industry, the HR/SA space in the higher education industry, and the Logistics space in the Inter-Modal industry. Mr. Daniel Moran holds a B.S. in Operations Management and an M.S. in Management Information Systems.

PEOPLESOFT PRODUCT EXPERIENCE

- Campus Solutions
- Human Resources
- Financials
- CRM
- Student Records
- Admissions
- Student Financials
- Financial Aid
- Campus Community
- Query/Crystal
- Security Admin
- Application Designer
- SQR
- Toad / SQL Developer

SUMMARY OF PROFESSIONAL EXPERIENCE

CLIENT NAME	PROJECT TYPE	SOFTWARE VERSION	MODULES	ROLE
CUNY	Training/Wave 4 Go-live	Peoplesoft 9.0	Student Records	Training Manager
Rochester Institute of Technology	Implementation / Go-Live Support	Peoplesoft 9.0	Admissions, CRM, Student Records	Project Consultant
Loyola University	Customization and Functionality Enhancements	PeopleSoft 9.0	Student Records, Academic Advisement	Project Consultant
University of Massachusetts	Financial Aid SAP Module	PeopleSoft 9.0	Financial Aid	Project Consultant



CLIENT NAME	PROJECT TYPE	SOFTWARE VERSION	MODULES	ROLE
University of Connecticut	Production Support / Enhancements	PeopleSoft 9.0	Admissions, Academic Advisement, Campus Community, Financial Aid, Student Records	Project Consultant
Montclair State University	Full Life Cycle Implementation	PeopleSoft 9.0	Admissions, Student Records, Campus Community, Financial Aid, Student Financials	Project Consultant
Moody Bible Institute	Financial Aid Implementation	PeopleSoft 9.0	Financial Aid	Project Consultant
Manchester University	Remote Production Problem Resolution	PeopleSoft 9.0	Student Financials, Financial Aid	Project Consultant
Bellevue University	Full Life Cycle Implementation	PeopleSoft 9.0	Financial Aid, Student Records, Student Financials	Project Consultant
Anderson University	Custom FA Development	PeopleSoft 9.0	Financial Aid	Project Consultant
City Colleges of Chicago	Full Life Cycle Implementation	PeopleSoft 8SP1	Admissions, Student Records, Campus Community, Financial Aid, Student Financials	Project Consultant
Benedictine University	ERP Software Upgrade	PeopleSoft 7.6 to 8SP1	HR, Admissions, Student Records, Campus Community, Financial Aid	Project Manager
College of Lake County	Production Support/Enhancements	PeopelSoft 7.6	Financial Aid, Reporting	Project Consultant
Benedictine University	Full Life Cycle Module Implementation	PeopelSoft 7.6	Financial Aid	Project Manager
Innotrac	Full Life Cycle Implementation of CRM	Proprietary CRM Visual Basic Front-End SQL-Server Back-End	CRM, Order Management, Warehouse Management	Business Analyst
Benedictine University	Production Support	PeopleSoft 7.6	Financials, HR, Admissions, Student Records, Campus Community, Financial Aid	Business Analyst
Hub Group	ERP Implementation	I2 Transportation Manager	Logistics, Optimization	Project Analyst

DETAILED PROFESSIONAL EXPERIENCE

PeopleSoft Consultant, New York City, NY, Nov 2013 – Present



- Training manager for four independent contractors and client team representing each module
- Conducted train the trainer sessions for the wave 4 go-live
- Admissions creation of FDDs(functional design documents)
- Provided individual mentoring to client staff
- Assisted testing manager to prepare data for major SIT testing involving teams from 9 different colleges

PeopleSoft Consultant, Rochester, NY, Nov 2012 – Present

- Supporting initiatives for the admissions department utilizing CRM and Campus Solutions
- Worked on troubleshooting issues with Common App file parser setup
- Created and tested setup for Common App Partial
- Configured mass changes for matriculation, prog action changes, and identified issues with current setup
- Worked on 3Cs items for checklists
- Supporting production issues with test loads, prospect creation, maintaining application, identity management integration
- Identified issues and provided solutions to integration between PeopleSoft Admissions and OnBase imaging software
- Developed archiving solution for files based on academic departments
- Performed with a SWAT team to optimize a process for loading PSAT scores into CS and creating over 350,000 suspects in CRM. Tuned a process from initial run time of 17 days down to 2 days. Created an app engine while sitting in a meeting to handle search/match in CS.
- Worked with on-shore and off-shore resources to facilitate development needs and production support
- Supported break/fix for production issues related to Integration Broker, Inquiry Forms, (OAA) Online Admissions Applications using AAWS and other items as needed.
- Developed strategy, policy, and technical tools to handle the Integration Broker purging/archiving. This included a one-time cleanup of over 20 million rows in over 30 tables.

PeopleSoft Consultant, Chicago, IL, Jul 2011 – Nov 2012

- Created customization for Self-Service Change My Major with automated email notifications utilizing component interface, page changes, and database level audit triggers to complete individual student transactions
- Developed web services for mobile devices to interact with PeopleSoft enrollment data
- Developed EWS(enrollment web services) front end using jdeveloper and ADF to extract enrollment based data(not in production.... setup as a demo)
- Configured and demonstrated new functionality for Graduation Processing and PERC Post Enrollment Requisite Checking



- Developed custom transfer credit xml report utilizing app packages and multi-level rowsets to build the xml
- Created custom self-service application for Internship Management as requested by the provost
- Implemented custom xml class roster with photos
- Merged client customizations with new delivered functionality for Apply for Graduation
- Developed custom security process for class schedules to allow decentralized departments to only update certain fields
- Developed workshop for development team and managers highlighting new undocumented features for PeopleSoft using App Engine, Javascript, Approval Workflow Engine, Java, Web Services and custom tools
- Provided production support for Academic Advisement issues related to setup and enrollment data

PeopleSoft Consultant, Remote work, Jun 2012 – October 2012

- Remote support for FA production support
- Developed an over award report by term for financial aid
- Developed a work study process to load a file from the SAP financials system and populate disbursement information
- Tuned Outstanding Balance application engine report for student financials. Modified the report that was running for 7 hours in production to complete in 2.5 minutes.

PeopleSoft Consultant, Boston, MA, Jun 2011 – July 2011

- Implemented the delivered Financial Aid SAP functionality to replace a custom bolt-on solution
- Led weekly multi-campus meetings to drive requirements and testing of functionality
- Customized app engine libraries to meet the business requirements
- Created custom pages to provide functionality for gaps in the delivered product

PeopleSoft Consultant, Storrs, CT, Nov 2010 – May 2011

- Created customization for crossover Pell, Acceleration, Nursing Loan Program, and FA Term for financial aid.
- Provided on-site support for COD and DL processing including implementing new functionality in maintenance packs
- Implemented modification utilizing component interface and application engine for automating PLUS processing
- Reapplied customizations for self-service for bundle application
- Applied sql updates to correct production data based on improper configuration for ethnicity and diversity from admissions application loads



-
- Provided issue resolution and testing for PeopleTools 8.5x
 - Cleared backlog of many open production and enhancement issues
 - Provided security support for Permissions/Roles and Row Level Security
 - Created DB triggers for auditing at the Oracle DB level

PeopleSoft Consultant, Montclair, NJ, August 2010 – Nov 2010

- Created Functional Design Documents for Admissions and Student Records customizations.
- Worked with off-shore resources to ensure end to end delivery of customizations and interfaces.
- Lead Integration Testing sessions with client resources
- Configured and tested Online Admissions Application which utilizes AAWS
- Setup User Profile Mass Creation with associated mass change and 3c configuration.
- Provided security support for Permissions/Roles and Row Level Security

PeopleSoft Consultant, Chicago, IL, April 2010 – July 2010

- Implementation of financial aid processes within the campus solutions suite.
- Assisted in the development of financial aid policies.
- Worked synchronously with the FA director to attain the necessary approvals for Title IV aid with the Department of Education.
- Configured financial aid for standard aid year processing from soup to nuts
- Trained staff on all functionality within the Financial Aid module
- Tested Bundle 16 and provided bug-fix resolution

PeopleSoft Consultant, United Kingdom, March 2010 – May 2010

- Provided subject matter expertise and technical knowledge of Student Financials and Financial Aid modules
- Working in a team of 3 remote support consultants, we solved a major performance issue that was plaguing the university during peak registration periods. The university had worked with several vendors previously without significant improvement.
- The group post process was taking up to 7 days to process one group. We were able to identify issues and bring the process to completion in under an hour. We also identified other areas of contention and provided recommendations for functional process improvements.

PeopleSoft Consultant, Omaha, NE, March 2009 – April 2010

- Mentored Development and Functional Staff on all aspects for PeopleSoft Campus Solutions
- Provided lead assistance to client security admin for maintenance of user profiles, roles and permission lists
- Provided production support post Go-Live for all financial aid processes.
- Coordinated efforts with ELM for all loan originations
- Trained staff on packaging and disbursement
- Developed customization for ISIR Checklist Assignment
- Developed conversion and custom pages for Legacy(IFAS) data
- Troubleshooting ISIR loads, CL4 loan originations, and various financial aid related issues
- Developed customization for Blackboard Learning Management System integration
- Modified the Student Bill and provided SQL solutions for correcting converted data



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- Worked in a complex remote hosting environment with OOD Oracle On Demand
 - Provided technical support and functional analysis for Student Records, Financial Aid and Student Financials
 - Modified the academic advising transcripts.
 - Converted TREQ transfer credit rules into PeopleSoft
 - Provided post conversion clean-up and research for program/plan, enrollments and Bio/Demo

Oracle University Instructor, Higher Technology Solutions, Boston, MA,

- Instructor for release 9.0 Financial Aid Equation Engine
- Prepared custom activity examples to cater to specific client inquiries

Financial Aid Consultant, Anderson, IN, February 2009 – April 2009

- Developed over 200 Equation Engines for Financial Aid processing
- Implemented modification for Automated Checklist Assignment and Checklist Completions
- Developed customization for Missing Information Letter.
- Configured 3Cs for MIL and FAN processing including printed and email letters using the comm gen functionality and XML publisher

PeopleSoft Consultant, Chicago, IL, August 2005 – December 2008

- Provided production support for seven colleges with 100,000+ students at a central district location
- Designed functional specifications for over 50 customizations
- Led reimplementation of Blackboard Learning Management System and integration
- Modified prior term copy process to function with heavily customized class data
- Led business process discussions as related to SR processes
- Ran complete end of term processing for grade roster creation, grade posting, repeat rules, delivered academic standing/awards, custom SAP processing.... Subsequently transferred knowledge to district office staff
- Led configuration and testing effort of the Satisfactory Academic Progress modification. This included over 300 test cases based on extremely complex institutional policy.
- Created SQL updates to modify sessions for entire terms which impacts all SR tables related to class sections
- Created a very complex faculty management customization to support intricate union contract rules into the course/class functionality
- Responsible for unit testing and regression testing of campus community and student records functionality during bundle application and tools upgrades
- Provided support for trouble shooting enrollment requirement groups, requirements and course lists



- Managed engagement with BlackBoard for the implementation and integration of the LMS learning management system and PeopleSoft Campus Solutions. This included single sign-on with Edirectory
- Created over 700 ad hoc queries for various inside departments and outside agencies
- Led mapping and development for conversion of military records from the legacy system
- Deep cross module knowledge of all functional areas of campus solutions
- Served on governing committee of campus solutions
- Reported status of various initiatives to the Vice President cabinet

Project Consultant, Chicago, IL, November 2004 – July 2005

- Responsible for schedule planning, staffing, budgeting, requirements definition
- Navigated in an extremely complex/political environment
- Monitored day to day activities for over 30 resources including functional, technical, and client resources
- Led weekly project status update meetings to communicate status to C-Level executives
- Produced and managed cutover plans for phased rollout of application functionality
- Developed modification and process flow for system enhancements from gap identification through development and unit testing
- Redesigned project tracking system to encompass full activity detail and allow for comprehensive reporting
- Documented lessons learned to increase staff productivity, reduce repetitive errors, and identify areas in need of improvement
- Customizations for the implementation exceeded 300 for Campus Solutions

Project Manager, Collegis, Maitland, FL, March 2003 – November 2004

Client: Benedictine University, Lisle, IL

- Project manager on PeopleSoft 8.0 SA Upgrade from 7.6 which involved the development and management of a 20 member Upgrade Partner team representing all functional/technical areas of the university
- Project manager for a successful full life cycle financial aid implementation involving creation of project charter, MS project plan, Fit-Gap analysis, design/setup of the financial aid module, final testing, and go-live
- Co-Developed with the CIO of Benedictine a cost-benefit analysis of upgrading PeopleSoft from client-server to web-based version
- Developed PeopleSoft functional end-user documentation for financial aid processes
- Developed and conducted end user training for financial aid counselors and director
- Total Compensation SQR developed with Access reporting front end to highlight salary, benefits, and other compensation
- Coordinated loan conflict resolution and reconciliation efforts among lenders, Elm, Financial Aid, and Student Financials



- Attended PeopleSoft Training for Academic Advisement 8.0, Intro to SA for 8.0, Student Records 8.0, Financial Aid 8.0
- Developed MS Access database for project tracking of AQIP university quality initiative
- Created custom Crystal Reports and Process Scheduler Requests to use in custom PeopleSoft menus
- Enhanced Ben U Live! Web application to include LDAP authentication across domains enabling students to view account information, grades, email, etc.
<http://www.ben.edu/benulive/>
- Developed online payments through Sallie Mae
- Responsible for supporting Admissions, Student Records, Financial Aid, and Student financials
- Developed pre-requisites in PeopleSoft student system using requirement groups, requirements, and course lists

Client: College of Lake County, Grayslake, IL

- Performed site assessment for initial sales functions including staff transitions
- Interviewed Financial Aid staff to determine overall status of aid processing
- Investigated several Financial Aid critical issues to determine cause

Systems Analyst, Innotrak, Bolingbrook IL, June 2002 – March 2003

- Supported implementation of the largest client in the company history for order fulfillment
- Analyzed all aspects of the CRMS/WMS/Web Services systems in respect to the client's business rules
- Gathered requirements for application enhancements and information requests and produced functional/technical specifications
- Designed and developed process flows with Visio to enforce solid consistent business practices
- Developed SQL server stored procedures including optimization of queries
- Created and provided web based Crystal Reports utilizing Seagate Crystal and Seagate Info Desktop
- Managed report development for the client including distance correspondence and facilitation

Programmer/Analyst, Collegis, Maitland, FL, October 2000 – June 2002

Client: Benedictine University, Lisle, IL

- Responsible for report creation for all departments of Benedictine University
- Developed FISAP reports for the financial aid office using multiple systems for data
- Developed SQR for library Voyager student extract
- Attended PeopleSoft Training for PeopleTools I, SQL/SQR, Crystal Reports/PsQuery
- Utilizing ASP and SQL, created Ben U Live! - on-line access to PeopleSoft SQL Server database



- Planned, designed, and constructed EWN Early Warning Notice application to track student progress via an ODBC link to PeopleSoft
- Developed interface in MS Access from PeopleSoft to EDEXpress financial aid software

Project Analyst, Hub Group, Lombard, IL, May 2000 – October 2000

Supply Chain Solutions Department, Corporate Office

- Supported Big 5 team in the implementation of i2 Transportation Manager ERP package
- Populated and queried database tables through ODBC connections
- Contributed current data and issues at weekly Project Status meetings
- Converted documentation from previous form to create Lotus Notes Document Libraries
- Designed and created real-time and batch reports in Showcase and MS Access
- Developed MS Access applications for accounting and operational data

Technical Analyst, Northern Illinois University, DeKalb, IL, May 1998- December 2000

- Responsible for ensuring successful set up for major events
- Applied supervisory skills as a team leader

EDUCATION

M.S. in Management Information Systems, Northern Illinois University G.P.A. 3.75

Courses include: System Design and Analysis, Java 2, International Business Management, E-Commerce, Business Decision Systems, Project Management

B.S. in Operations Management, Northern Illinois University

Courses include: C, COBOL, Visual Basic, Telecommunications, Unix Systems, RDBMS, Strategic Management, Human Resource Management

TRAINING

- PMP – Project Management Professional 4 month training course
- Attended PeopleSoft Training for PeopleTools I, SQL/SQR, Crystal Reports/PsQuery, Academic Advisement 8.0, Intro to SA for 8.0, Student Records 8.0, Financial Aid 8.0



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- Attend Higher Education User Group conferences each year(presented 2007, taught workshop 2012)
 - MCDBA - Microsoft Certified Database Administrator 6 month training course This included Microsoft Network and Active Directory Training
 - YCA Success Method – Project management training

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ROBERT J. RATWAY

rratway@solidan.net

Mr. Ratway has more than 16 years of PeopleSoft consulting experience. Mr. Ratway has been both a Functional and Technical Lead, and has PeopleSoft Campus, Financials and HR experience. Mr. Ratway has extensive experience with all facets of PeopleSoft's development technology, including XMLP, Integration Broker, Component Interface development, and Data Warehouse Design and implementation.

KEY SKILLS

- System Implementations
- Upgrades
- Production Support
- Project Management
- Business Process Redesign

PEOPLESOFT PRODUCT EXPERIENCE

- Student Financials
- Campus Community
- General Ledger
- Purchasing
- Order Management
- Financial Aid
- Student Records
- Accounts Payable
- Asset Management
- HRMS
- Student Financials
- Workflow
- Accounts Receivable
- Supply Chain Management
- EPM

PEOPLESOFT PEOPLETOOLS EXPERIENCE

- PeopleTools
- Application Messaging
- SQR
- PeopleCode
- Component Interface
- DataStage/Informatica ETL
- Application Engine
- Data Mover
- OBIEE

SUMMARY OF PROFESSIONAL EXPERIENCE

CLIENT NAME	PROJECT TYPE	SOFTWARE VERSION	MODULES	ROLE
Crop Production Services	Implementation	PeopleSoft 9.1	FSCM, AR/Billing	Functional/Technical Lead
University of Connecticut	Bolt-On Application for Admissions	PeopleSoft 9.1	Admissions	Functional/Technical Lead
Vail Resorts	Implementation	PeopleSoft 9.1	FSCM, AR/Billing	Technical Lead
Washington State University	Implementation	PeopleSoft 9.1 DataStage 8.1, 8.5 EPM 9.1, OBIEE 10g	Campus Solutions, EPM, OBIEE DataStage	Data Warehouse Architect
Kutztown University	Implementation	PeopleSoft 9.1	Campus Solutions	Functional/Technical Consultant
Harris Corporation	Integration Project	PeopleSoft 9.0	FSCM, Inventory & Manufacturing	Technical Integration Consultant



University of Central Florida | ITN 1325JCSA

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

CLIENT NAME	PROJECT TYPE	SOFTWARE VERSION	MODULES	ROLE
University of Massachusetts	Implement New Functionality	PeopleSoft 9.0	Student Financials, EPM, OBIEE, DataStage	Functional Consultant
University of Connecticut	Production Support	PeopleSoft 9.0	Campus Community & HRMS	Technical Consultant
Brigham Young University	Fit Gap for U[grade	PeopleSoft 9.0	Student Financials	Functional Lead
Cal State Northridge	Fit Gap for Upgrade	PeopleSoft 9.0	Student Financials	Functional Lead
University of Arizona	Implementation	PeopleSoft 9.0	Student Financials, Student Records, Admissions, Financial Aid	Technical Lead
Berkeley College	Financial Aid Business Process Redesign	PeopleSoft 8.9	Financial Aid	Functional Lead
Cal State Northridge	Business Process Redesign, Implement New Functionality	PeopleSoft 8.9	Student Financials, Financial Aid	Functional Lead
Cedar Crestone	Admissions Technical	PeopleSoft 9.0	Admissions	Technical Integration Lead
City University of Seattle	Upgrade and Production Support	PeopleSoft 9.0	Student Financials	Functional and Technical Lead
University of Florida	Implementation and Reconfiguration	PeopleSoft 9.0	Student Financials	Functional Lead
University of Colorado	Business Requirements Analysis	PeopleSoft 9.0	Student Financials	Functional and Technical Lead
University of Missouri	Implementation	PeopleSoft 8.9	Student Financials, Financial Aid	Functional and Technical Consultant
Brigham Young University	Implementation	PeopleTools 8.46	Student Financials, Campus Community	Functional and Technical Consultant
University of Florida	Production Support	PeopleSoft 8.4	Financials, HRMS, Workflow	Technical Consultant
Alta Colleges	Implementation	PeopleSoft 8.2	Student Records, Student Financials, Admissions, Financial Aid	Technical Consultant
University of Florida	Production Support	PeopleSoft 8.4	Financials	Technical Consultant
Fairchild Semiconductor	Upgrade	PeopleSoft 7.0 to 8.4	Financials, Supply Chain Management	Technical Consultant
The Allegis Group	Production Support	PeopleSoft 8.1	Financials	Technical Consultant
Fairchild Semiconductor	Upgrade	PeopleSoft 7.0 to 8.4	Financials, Supply Chain Management	Technical Lead
Fairchild Semiconductor	Upgrade	PeopleSoft 7.0 to 8.4	Order Management	Technical Lead
Integrated Health Services	Upgrade	PeopleSoft 7.2 to 8.1	Financials, HRMS	Technical Lead
Fairchild Semiconductor	Implementation	PeopleSoft 7.2	Financials, Supply Chain Management	Technical Consultant



CLIENT NAME	PROJECT TYPE	SOFTWARE VERSION	MODULES	ROLE
Social Security Administration	Implementation	PeopleSoft 7.5	HRMS	Technical Consultant
Intel	N/A	N/A	N/A	Senior Manufacturing Process and Development Engineer

DETAILED PROFESSIONAL EXPERIENCE

Jan 2013 **Crop Production Services (Loveland, CO)**

To Present **PeopleSoft Financials AR/BI Functional/Technical Consultant**

- Worked with end users to design functional requirement for system modifications.
- Created detailed Functional and Technical design documents for offshore resources.
- Developed number Synchronous and Asynchronous service operations for AR and Billing, to keep AR Transactions in sync between PeopleSoft and the Client's POS system.
- Designed custom Credit Balance Refund process between OnBase and PeopleSoft.
- Worked with data conversion team to convert customers and AR balances from current AR system.
- Developed service operation for customer updates from Credit Point (Third Party credit software)

July 2013 **University of Connecticut (Storrs, CT)**

To Oct 2013 **Admissions Functional/Technical Consultant**

- Worked with Admissions Department to design custom Admissions Applicant Evaluation Pages, and Decision Dashboard Pages for Undergraduate Applicants.
- Developed Online Setup Pages, Applicant Evaluation Pages, and Decision Dashboards Pages.
- Developed an App-Engine Process to process Admission Decisions captured from the Decision Dashboard Pages.

July 2012 **Vail Resorts (Broomfield, CO)**

To Dec 2012 **PeopleSoft Financials AR/BI Technical/Functional Consultant**

- Worked with end users to design functional requirement for system modifications.
- Developed custom Billing Interface, Invoices, Dunning Letters and Statements, and Excel to CI Billing Upload.
- Developed custom reports and queries for Billing and AR modules
- Developed asynchronous service operations between clients RPOS system and PeopleSoft Financials Supply Chain, to maintain customer data.



Jan 2011 **Washington State University (Pullman, WA)**

To July 2012 **Data Warehouse Architect (DataStage/EPM/OBIEE)**

- Configured EPM for Campus Solutions.
- Configured DataStage, Installed delivered ETLs
- Developed new Staging, Dimension and Fact jobs to bring over custom tables and delivered tables that PeopleSoft didn't include in their dsx files.
- Created procedure for creating a new EPM instance, including procedures for refreshing staging, dimension and fact tables.
- Installed EPM Bundles including new DSX and RPD files.
- Trained WSU employee resource on all aspects of DataStage and EPM.
- Resolved issues with delivered ETL Jobs.

Sept 2011 **Kutztown University (Kutztown, PA)**

To Jan 2012 **Student Financials, Financial Aid, Student Records**

- Worked with Assistant Bursar to develop queries for reconciling SF to GL.
- Created an MPN Load Process from Campus Partners to the FA Entrance Counseling Component.
- Trained Bursar's office on the SF Term Cancellation process, due to non-payment of fees.
- Setup 3Cs for use with the term cancellation process
- Configured FA for Summer Crossover Pell
- Modified delivered invoice to include Anticipated Aid in the Balance due, and also modified the invoice print process so that invoice information was static, not dynamic as delivered.
- Setup Credit History process and used mass assign and mass release to assign/remove service indicators based on Credit History Aging data.
- Trained FA Office on how run the Origination, Authorizations, Disbursement and various Acknowledgement processes.
- Identified and resolved various issues related to Origination, Authorization and Disbursement of Aid
- Created a new Batch Charge Adjustment process, which allows charges to be partially adjusted via a file load. The delivered Group Processing doesn't allow for this.
- Trained Bursar's Office on how to setup Adjustment Calendars.
- Created Disbursement Notification Emails for Federal Loans Parent Plus Loans Letters using Pop Select.
- Resolved SR Conversion Data issues that were affecting the SAP process
 - Reset Cum Stats CI which reset Cum Stats for Students that graduated and were seeking a second degree in the same career.
 - Identified conversion issues where enrollment was brought over without units on the enrollment table.
 - SR Calendar had the wrong graded dates, which excluded some enrollment from the SAP calculation.
- Setup 1098T processing for the 2011 calendar year.



June 2011 **Harris Corporation (Melbourne, FL)**

To Sept 2011 **Inventory/Manufacturing Technical Integration Consultant**

- Configured Integration Broker Messaging, to send delivered Product, Project and Customer Messages between PeopleSoft Inventory and Siebel Sales.
- Developed Interface between Siebel Sales and PeopleSoft Manufacturing to request demand fulfillment when an order is taken in Siebel.

May 2011 **University of Massachusetts (Shrewsbury, MA)**

To June 2011 **Student Financials, OBIEE Functional Lead**

PeopleSoft 9.0, Oracle, Unix

- Evaluated current configuration, made adjustments to Charge Priorities, Term Fee Equations and Item Type priorities.
- Implemented the new 9.0 AP Self-Service Direct Deposit refunding
- Implemented a custom pop-select for updating Class Fees after running the Class Fee Rollover process.
- Configure single signon between Campus Solutions, EPM, and OBIEE.
- Evaluated Current OBIEE configuration. Evaluated current Informatica ETL and Schema in preparation for upgrade and conversion to DataStage.
- Trained end-users on Pop-Select, 3Cs and Direct Deposit Refunding

Nov 2010 **University of Connecticut (Storrs, CT)**

To May 2011 **Student Financials & Financial Aid Support**

PeopleSoft 9.0, Oracle, Unix

- Provided Functional and Technical support for Student Financials and Financial Aid modules.
- Implemented Single Sign On PeopleCode for both Campus and HRMS environments.
- Implemented Service Pack II, Hosted Payments, with TouchNet
- Developed custom IScripts and Web Services for use with TouchNet's Hosted Payment, to auto-post payment to the Student's Account
- Resolved Issues with Payroll Refunding that was causing student's to fail Pay Calc due to missing state locality record.
- Identified issues with Student Deposits that causes Deposits to post to the incorrect Term
- Worked with Help Desk to troubleshoot issues with password reset and forgotten password functionality.
- Worked with HR Resource to develop conversion app-engine and component interfaces for importing Job related data.



Oct 2010 **Brigham Young University (Provo, UT)**

To Nov 2010 **PeopleSoft Financial Aid, Student Financials, Campus Community Functional Lead**

PeopleSoft 9.0, Oracle, Linux

- Performed Student Financials and Financial Aid Fit Gap for upgrade from version 8.9 to 9.0.
- Created an inventory of all system modifications and made recommendations of how to eliminate system modification using delivered functionality.
- Presented new XMLP, Population Select/Update, and 3C Communication Generation functionality to the Student Financial and Financial Aid business analysts and technical team.
- Presented new Financial Aid and Student Financial Functionality in 9.0.

Sept 2010 **Cal State Northridge (Northridge, CA)**

To Oct 2010 **PeopleSoft Student Financials, Campus Community Functional Lead**

PeopleSoft 9.0, Oracle, Unix

- Performed Student Financials Fit Gap for upgrade from version 8.9 to 9.0.
- Evaluated all system modifications and made recommendations of how to eliminate system modification using delivered functionality.
- Presented new XMLP and Population Select/Update functionality to the Student Financial business analysts and technical team.
- Presented new Student Financial Functionality in 9.0.

May 2009 **University of Arizona (Tucson, AZ)**

To Sept 2010 **PeopleSoft Financial Aid, Student Financials Technical Lead**

PeopleSoft 9.0, Oracle, Linux

- Worked with functional team members to develop functional requirement documents and estimated time and effort for development and ongoing maintenance.
- Managed the work of 2 client resources, and provided training to these resources in Oracle/PeopleSoft programming languages and techniques.
- Created several training programs for client and consulting resources, including “How to Implement Pop-Select” and “How to Implement XMLP Reporting”.
- Responsible for the development of all Financial Aid and Student Financials system modifications and enhancements.
 - Modified External Awards Process
 - FA Award Notification using Forms Engine
 - SAP Status Page



- Implemented Populate Update for FA Packaging Variables and Student Aid Attribute Updates
- Custom Financial Aid Status Page
- Created Equation Engines used for Packaging
- XMLP Cashiering Receipt
- Hosted Order Payments via CyberSource
- Developed interfaces between PeopleSoft and SIS to keep CPP and Enrollment data in sync during the phased go-live.
- Developed Interface between clients legacy Admissions Entry application and PeopleSoft's Admissions Components via Web-Services.
- Developed Single-Sign on PeopleCode to integrate with Shibboleth Identity Management Software. Worked with PS Admin to implement.
- Implemented PeopleSoft's new Hosted Student Payments with CyberSource, which eliminated the PCI compliance implications from the University

March 2009 **Berkeley College (New Jersey)**

To May 2009 **Financial Aid Functional Lead**

PeopleSoft 8.9, SQL Server, NT

- Analyzed current Financial Aid Term and Budget Build setup, and reconfigured to simplify setup and meet Federal regulations.
- Developed a semi-custom process to send student enrollment information to the National Student Clearing House.
- Designed and implemented an automated email communication process for the Financial Aid and Admissions business offices.

Jan 2009 **Cal State Northridge (Northridge, CA)**

To May 2009 **PeopleSoft Student Financials, Campus Community Functional Lead**

PeopleSoft 8.9, Oracle, Unix

- Analyzed clients business processes and made business process redesign recommendations, based on best practices.
- Developed and executed a project plan to re-implement the client's Billing and Collections processes.
- Created a 12 week Student Financials Training schedule, and trained the Universities Business Analysts on all aspects of Student Financials.
- Implemented PeopleSoft's 3C's as they relate to the collections process.
- Documented the steps needed to convert the client from AP to HR refunding, which would increase the productivity and reliability of the refunding process.



Dec 2008

Cedar Crestone (Corp to Corp)

March 2009

PeopleSoft Admissions Interfaces Technical Lead

PeopleSoft 9.0, Oracle, Unix

- Worked with Cedar Crestone’s internal development team to develop Service Operations and related Web Services for the following Admissions Components. These Web Services were developed as a future product offering to clients who wanted to interface their third party applicant entry with PeopleSoft.
 - Add Application
 - Maintain Applications
 - Bio Demo Add/Update Person
 - Addresses
 - Phones
 - Electronic Addresses

- Developed test scripts and tested Web Services using SOAP UI Utility

Nov 2008

City University (Seattle, WA)

To Jan 2009

PeopleSoft Student Financials Technical/Functional Lead

PeopleSoft 8.9, Oracle, Unix

- Resolved data issues found during the execution of Table Validation.
- Resolved TPC and Tuition Calc setup issues, and identified indexes that improved Tuition Calc run-time from several minutes to a few seconds.
- Trained staff members on new functionality related to Mass Contract Assign/Cancel, Service Indicator Mass Assign, and Pop-Select table update processes.

June 2008

University of Florida (Gainesville, FL)

To Jan 2009

PeopleSoft Student Financials Functional Lead

PeopleSoft 9.0, Oracle, Linux

- Reconfigured customers existing item type setup. Cloned existing GL Interface Cobol process and modified to account for client’s GL mapping needs.
- Created a custom Cobol process which enabled real-time Credit History processing via peoplecode.
- Worked with HR client resource to configure HR Refunding.



- Configured Tuition Calc, which included the creation of several Equation Engines.
- Configured Tuition Waivers.
- Configured Late Fee processing and developed a custom Short Term Loan interest charge program.
- Configured Service Indicators and Credit history processing.
- Worked with security team to define the desired SF security.
- Created SF Item Type and Security Tree, Charge Priorities and Payment Priorities.
- Created a CashNet to PeopleSoft reconciliation process.

Nov 2007

University of Colorado (Boulder, CO)

June 2008

PeopleSoft Student Financials Functional Lead

PeopleSoft 9.0, Oracle, Unix

- Gathered business requirements and worked with functional SF team to create functional specs.
- Setup payment plans for emergency loan requirements.
- Resolved issues with charge priority, refunding and cashiering setup.
- Worked with client to define service indicators/impacts and aging sets for credit history processing.
- Saved CU over \$200,000.00 by eliminating SF mod requests made by previous consultant, by using delivered PeopleSoft functionality.
- Setup faculty and staff and RA/TA waiver processing for tuition calc.
- Eliminated admissions checklist update mod request by recommending using delivered checklist update process, and scheduling as a background process.
- Reviewed SR functional specs and estimated time and effort to develop and maintain the system modifications.

Jan 2007

Brigham Young University (Provo, UT)

Oct 2007

PeopleSoft Functional/Technical Lead

PeopleSoft 8.9 Student Financials, Campus Community

Platform: PT 8.46, Oracle, Unix

- Developed a high level go-live plan, which included all of the steps needed to go-live.
- Worked with the Client Security Administrator to develop strategy for Permission Lists and Roles.
- Setup payment application rules and resolved a bug with SFPAPLPY.CBL.
- Worked with Client to create item types and setup item type security tree.
- Developed IScripts to interface 3rd party cashiering systems (infiNET, cashNET with PeopleSoft Student Financials).
- Created App-Engines to reconcile real-time payments from infiNET and cashNET
- Resolved issues with PeopleSoft App-Messaging between Student Financials and Financials systems. (DEPT_FULLSYNC)



- Customized look and feel of the BYU Portal. Created custom style-sheets and Branding app-package. Created and configured a separate Portal for Students. Modified Navigation IScripts and created a custom Homepage Tab.

Nov 2005 **University of Florida (Gainesville, FL)**

Jan 2006 **Senior Technical PeopleSoft Consultant**

PeopleSoft 8.4 Financials Workflow

Platform: PeopleSoft 8.4, Unix/DB2, Windows XP Client

- Responsible for supporting AP, PO, BI, AR, GL and GM modules. Researched various issues, applied PeopleSoft bundles and developed fixes for non-reported issues.
- Developed year end reports to compare commitment control transactions to various subsystems and identify the reason for the discrepancies.
- Reviewed all nightly batch processes for both Financials and HRMS and tuned the individual processes by adding indexes and in some cases modifying inefficient sql statements.
- Tuned the PO and Requisition Reconciliation Processes.
- Tuned the Grants Facilities Admin Process.
- Tuned the HR Pay Calc and Pay Confirm Processes.
- Tuned PYAP_XTAX, PYAP_XDEDN and PAYGL02.SQR.
- Implemented ePro Change Request Workflow.

June 2005 **Alta Colleges (Denver, CO)**

Jan 2006 **Senior Technical PeopleSoft Consultant**

PeopleSoft 8.2 Student Admin/Financials

Platform: Windows XP Client, Windows 2000/SQL-Server

- Developed a custom Online Student Enrollment Form Module which allows users to create and maintain online Application Documents that can be signed by students online. Also developed a process to verify student information with Equifax.
- Resolved issues with PeopleSoft's Worklist Replication process, modified the process to provide real-time worklist information and allow users to work/reassign items from the Portal Worklist.
- Developed an Application Engine process to automatically create and send 3C Mail-Merge Communications to Students, via API-Object calls.
- Developed an IScript to perform an html form post to auto-login students to Sallie Mae's web-site, for paying their student loans. Created an IScript to receive a response from the Sallie Mae web-site to post payments made by students back to the PeopleSoft Student Financials system.



March 2005 **University of Florida (Gainesville, FL)**

June 2005 **Senior Technical PeopleSoft Consultant**

PeopleSoft 8.4 Financials Workflow

Platform: PeopleSoft 8.4, Unix/DB2, Windows XP Client

- Analyzed Client's Workflow configuration and customizations and delivered a Project Plan detailing the work required and a time estimate.
- Resolved synchronization issues between Client's Financial and Portal Worklists. Worked with PeopleSoft to incorporate code fixes in future software releases.
- Documented Client's eProcurement Workflow setup and how their setup interacts with the system. Reworked the Client's Approval Rules to eliminate custom hard-coding.
- Resolved miscellaneous workflow issues surrounding Travel/Expense and Grants Workflow.
- Reworked Client's custom HR Workflow for Job Approval, Additional Pay Approval and Position Approval.

Nov 2004 **Fairchild Semiconductor (South Portland, ME)**

Feb 2005 **Senior Technical PeopleSoft Consultant**

PeopleSoft Financials/Supply Chain v8.4 Upgrade.

Platform: PeopleSoft 8.4, Unix/Oracle, Windows 2000 Client

Financials (AP/GL/PO/AM)

- Resolve application issues prior to 8.4 go-live and provide production support post go-live.
- Convert Crystal Reports and Queries from V7 to V8.4 for GL/AP/PO.
- Resolved setup issues for Purchase Order Approval Workflow and created workflow configuration documentation for administration purposes.

July 2004 **The Allegis Group (Hanover, MD)**

Nov 2004 **Senior Technical PeopleSoft Consultant – PeopleSoft Financials Production Support**

Platform: PeopleSoft 8.1, Unix/Oracle, Windows XP Client

- Supported Clients AR, Billing, Contracts, Projects, AP and GL Modules. Resolved delivered bugs, created scripts to resolve data issues in production and added new functionality to prevent the occurrence of future issues and to help end-users identify and resolve issues on their own. This involved modifying delivered and custom PeopleCode, SQR and App-Engine programs.
- Created custom queries to help end users identify the root cause of GL and AR out of balance issues.
- Worked with junior-level support staff to create reports which helped them identify and proactively resolve issues before they were identified by the user community.



June 2003 **Fairchild Semiconductor (South Portland, ME)**

July 2004 **Technical Team Lead/Sr. Consultant**

PeopleSoft Financials/Supply Chain v8.4 Upgrade.

Platform: PeopleSoft 8.4, Unix/Oracle, Windows 2000 Client

Financials (AP/GL/PO/AM) – Senior Technical Consultant

- Developed Application Engine conversion programs for Journals, Banks, Purchasing, Vendors and Receivers tables.
- Implemented Virtual Approver for Purchase Order Approval process.
- Resolved issues with Pay Cycle and Payment Post App-Engine processes.
- Re-implemented Client's V7 customizations, which included modifications to Components, Pages, PeopleCode, SQR, Queries and Crystal Reports.

Order Management – Technical Team Lead

- Worked with end-users to design, develop and test a new Quoting System, which increased productivity and provided a greater level of flexibility over the PeopleSoft delivered Quoting System.
- Created Technical Specification for the new Quoting system based on Customer's functional requirements.
- Used Workflow to develop an automated "Quote Approval Process", which greatly reduced response time to the end-customer.
- Created Component Interfaces to convert approved Quotes into Orders, Buying agreements and Bids.
- Developed a new PeopleCode Security Function, which simplified the implementation of Role/Field Level Security.
- Assisted in Customizing the Customer Portal, which involved modifying delivered Application Packages, HTML objects and IScripts
- Developed an interface between CRM and Order Management, which allowed Products associated with CRM Opportunities to be visible within the Quoting and Order Management Systems.
- Created an Application Engine Program to Close and Expire Quotes.
- Developed several Application Engine Programs for conversion of OM data from V7 to V8.4.
- Directed the work of 3 junior developers and trained them to support the Order Management and Quoting systems.



Dec 2001 **Integrated Health Services (Baltimore, MD)**

To June 2002 **Technical Team Lead**

PeopleSoft Financials/HRMS v8.1.x Upgrade

Platform: PeopleSoft 8.x, Unix/Oracle 8i, Windows 2000 Client

- Developed a high level project plan and assigned work to junior programmers.
- Performed code reviews to ensure that published procedures were being followed.
- Developed Test Cases/Scripts from Technical and Functional Documents and was responsible for resolving issues that arose during testing sessions.
- Performed data conversion, analyzed customizations in a 7.2 environment and applied them to 8.16, designed and developed new SQR reports, pages, components and peoplcode functions, and worked with PeopleSoft to fix delivered bugs.
- Managed all aspects of PeopleSoft application tuning, including online, SQR, Cobol and App-Engine.
- Implemented Application Messaging between PeopleSoft HRMS and Financials systems. (Business Units and Companies).
- Rewrote the existing Kronos interface SQR to improve efficiency and error resolution.

Feb 1999 **Fairchild Semiconductor (South Portland, ME)**

To Dec 2001 **Technical PeopleSoft Consultant**

PeopleSoft Financials/Supply Chain Implementation v7.2

Platform: PeopleSoft 7.x, Unix/Informix Server, NT 4.0 Client

- Responsible for designing and developing an Interface between Fairchild Semiconductor's PeopleSoft Order Management/Inventory/Billing system and a newly acquired company's (Samsung's Power Device Division in Seoul Korea) SAP Inventory Management system.
- Developed a conversion process for integrating the backlog of newly acquired companies into Fairchild Semiconductors Order Management, Inventory and Billing systems.
- Designed new Panelgroups/Panels/Records/Views/PeopleCode, which are being used for Inventory Management.
- Designed new SQR's and SQC's, which were used for data conversion and interface processing between the Client's Legacy system and the new PeopleSoft Order Management and Inventory system.
- Customized INS6000 and INS6001 to handle client's business process. This included custom INBU attributes, pick rules and tie-breaker logic.
- Developed EDI 830, 850, 855 and 862 SQR processes.
- Created Unix scripts for monitoring database performance. Utilized the explain table to analyze the captured SQL statements, identify indexes that were missing, tables which required update statistics be run, and reorganize highly fragmented tables.



- Tuned several PeopleSoft delivered SQR's and Application Engine Cobol jobs, including OMEC, OMDEMAND, OMBACK, INS6000, INS6001, INPBCONF and INPPDEPL.

Technical Team Lead

- Lead Fairchild Semiconductor's web reporting Initiative for their PeopleSoft Order Management and Inventory systems.
- Developed procedures for converting existing SQR's to produce both standard and HTML reports.
- Designed and developed an automated HTML document delivery system, which creates HTML documents, auto-FTP's these documents to the Client's secure external web-site, and emails a list of role-users with the URL of the newly generated reports.

July 1998 **Andersen Consulting (Washington, DC)**

To Feb 1999 **Technical PeopleSoft Consultant**

Social Security Administration

Platform: Unix/Oracle Server, NT 4.0 Client

- Implemented PeopleSoft Federal HRMS. Modules implemented were Benefits, Position Management, Training Administration and Labor Relations.
- Worked with the client to gather reporting requirements, initial analysis to determine gap, data-mapping for SQR conversion and interface programs, general/detailed design of various panels including the underlying PeopleCode, and SQR/Crystal reports.

June 1996 **Intel Corporation, Chandler (AZ, OR)**

To June 1998 **Senior Manufacturing Process and Development Engineer**

Photolithography

- Developed a high-level project plan to identify, develop and implement key ARFC's for Intel's manufacturing group.
- Identified key data that needed to be collected and assigned owners and expected completion dates.
- Created an interactive Intranet web site using a combination HTML and Java Script, which was used to maintain and answer questions about the ARFC's.
- Responsible for training the manufacturing group on ARFC use.
- Streamlined manufacturing systems to increase tool availability and utilization.
- Used VB 5.0 /Access 2.0 to develop an application which automated the tracking of tool availability and rework.
- Worked on a team that designed and implemented BOM, Inventory management and WIP management software applications. These applications provided a 3% increase in tool availability, reduced headcount by ~ 20% and reduced capital spending by more than 10 million dollars/year.



EDUCATION

- North Carolina State University – Masters of Science, Materials Science Engineering
University of Michigan, Ann Arbor – Bachelor of Science, Materials Science Engineering

PROFESSIONAL TRAINING, CERTIFICATIONS, AND AFFILIATIONS

- PeopleSoft PeopleTools I and II
PeopleSoft Advanced PeopleCode
PeopleSoft SQR/SQL

TECHNICAL SKILLS

OPERATING SYSTEMS

- UNIX, VMS, Microsoft Windows (95, NT, 2000, and XP)

DATABASES

- Microsoft SQL Server, Oracle 8i, 9i, and 10i, Informix 7.x, DB2

LANGUAGES

- Visual Basic, VBScript, HTML, JavaScript, C/C++, SQL

OTHER SOFTWARE, TOOLS, AND UTILITIES

- Perl Scripting, ASP, COBOL

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Kyle Clemons
(214)707-3463
KClemons@solidan.net

I started my consulting career as a Human Resource and Payroll consultant working primarily at higher education clients. I transitioned to the Campus Solutions product when it was "beta" released in late 1996 working primarily as the functional lead and project manager for all modules. As the Campus Solutions product developed and grew, I became more of a Student Financials specialist while retaining a solid understanding of the HR processes.

I have both functional and technical skills that I have developed and enhanced during my 17 plus years of consulting experience. I am extremely adept in writing and producing SQL scripts, as well as producing reports via SQR, PS Query, Crystal, Excel, and other report writing tools. My primary strength is my people skills. I work well with others (both large and small groups) and communicate effectively to knowledge transfer in an extremely efficient manner.



I take pride in my ability to use my common sense to evaluate issues, explore resolutions, and provide my clients with timely and accurate results. My leadership roles have always culminated in successful projects. I will not exaggerate timelines to present management with unrealistic goals. "Success" means everything to my future potential to continue in my consulting endeavors.

PeopleSoft Higher Education Clients

University of Massachusetts - Lowell (10/13 to Present) Short engagement to assist the SF Dept with clean-up of old student accounts. Will also be configuring and testing the Refund Direct Deposit process for the campus to utilize.

College of the North Atlantic (07/13 to 08/13) – Assist the CNA team with configuration and testing of student self service online payments. Also, reviewed current configurations and made recommendations of changes to their current charge priorities. Created SQL scripts to help CNA keep their Item Types and Trees "clean".

University of Massachusetts (02/13 to 05/13) – Assist Financial Aid with implementation of new government requirements for "Shopping Sheets" and "ATB (Ability to Benefit)". Created queries to Pop Update fields, based on the institution's requirements, to populate the proper indicators.

Rochester Institute of Technology (11/12 to Present) – Creating queries for the Admissions department. Created several "views" to simplify the creation of queries by the users. Provided the staff with customized Basic and Advance Query training.

University of Massachusetts (01/12 to 09/12) – Assist SF with new tuition calc Equations, as well as write a GL Reconciliation report. I also assisted FA to create a process to automatically download data from COD (Common Origination and Disbursement) file directly into PeopleSoft so data will not need to be manually entered. Assisted the Admissions module to develop a process to allow students to enter their personal application data via a "common application", utilized by several universities, and process the data into the appropriate PeopleSoft tables.

Lorain County Community College (05/11 to 12/11) – Assist the Student Financial areas in GL reconciliations, Bursar Holds, Query Training, Re-conversion Project, and other various reports and queries. On-going remote assistance as required.

University of Texas Southwestern Medical School (03/10 to 05/11) – Brought in to train the Student Financial Lead on the version 9.0 campus solutions implementation project. Review all functional setup and processes including Population Select/Update and Equations. Contract was extended to assist in other areas.



University of Massachusetts (02/09 to 03/10) – Lead consultant on the Student Financials upgrade from version 8.0 to version 9.0 project. Provide knowledge of the newly delivered functionality as well as trouble shooting issues that arose. New functionality includes “equation engine” and “XML” Invoice template setups. I worked with both the Student Financials and Financial Aid departments to create several reports as requested by the various campuses.

University of Connecticut (03/08 to 12/08) – Assist the Student Financials team with the upgrade of Student Admin Oracle/PeopleSoft from version 8.0 to version 9.0. I worked closely with the team to create documents of fit gaps during the discovery process of the project. Assistance includes test planning, change procedures, documentation and actual testing of the system. I also prepared materials and taught classes (Introduction and Advance) on PS Query for about 40 users.

University of Massachusetts (09/04 to 12/08) – Assist the Student Financials team with the go-live/implementation effort and then production support post go-live. Assistance includes functional and technical responsibilities including testing, creating reports and queries, as well as explaining and demonstrating delivered processes. Assist one of the campuses with their upgrade to version 8.9. In later months of the project, I assisted the Financial Aid team mainly in the form of reports.

Soka University (08/04 to 09/04) – Short engagement to review Soka University’s student admin’s setup. I made several changes as well as future recommendations for them to consider. I assisted in finding them a local consultant in order to save money on travel expenses.

University of Albany (05/04 to 08/04) – Create reports to reconcile the Student Accounts and Financials departments. Write documentation explaining the SF to GL process. Create a new “reporting tree” so the university can report to the state by “revenue categories”.

Corinthian Colleges, Inc (6/02 to 05/04) – Assisted a publicly traded education institution with the implementation of more than sixty college campuses nation wide. Assistance included Student Financials, Student Records and Admissions. Work performed, included functional process procedures, technical report writing, and assistance with data conversion.

Syracuse University (1/01 – 5/02) – Assisted the Student Financials department in the implementation of PeopleSoft. Functional and Technical assistance including customizations and SQRs. Work included Invoice/Billing;



GL; Payment Plans; Student Refunds; Tuition & Fees.

Southern Methodist University (5/99 – 11/00) – Assisted in the implementation of the Student Financials and Student Records modules. Assistance included creating reports (both crystal/query and SQRs), prototyping processes, debugging delivered processes, upgrading to new versions, and development of procedures and documentation. Created custom reports to print from icons directly on panels such as History of Student Account. Also created a Student Receipt customized to meet SMU's requirements.

Syracuse University (7/98 – 4/99) – Assisted in the rollout of the Student Records and Admissions modules. Created SQR processes to extract data for enrollment appointment letters to students. Created initial SQR to backload data from PS Student Records system to legacy in order to maintain modules still on legacy systems. Created a "Student Study List" custom panel. Worked with both Student Records and Admissions people on various processes for fit gap analysis.

Southern Methodist University (2/98 – 6/98) – Assisted the Student Financial department in creating setup tables for the PS Student Financials module. Worked closely with the SMU staff to determine "Fit Gap" differences between legacy and the PS systems. Created technical specifications for customizations SMU determined were required. Actually developed several of the customizations.

Texas Christian University (9/97 – 11/97) – Student Admin functional lead for the consulting implementation project. Lead all four modules (Admissions, Student Records, Student Financials, and Financial Aid) in prototype sessions. Determined the "Fit Gaps" between the PS product and TCU's legacy systems.

Syracuse University (2/97 – 9/97) – Student Admin functional lead for the consulting implementation project. The PS product was still in a beta version during most of this assignment. Most of the time was spent digging into the code behind programs and panels to determine how the product worked (there was very little documentation during this stage of the product). Once processes were determined, sessions were held to demonstrate to the client.

Syracuse University (9/96 – 12/96) – HRMS functional consulting lead on the implementation project. Prototyped the Payroll and Benefit modules of the PS system. Created technical specifications for modification determined required during prototype sessions.



Houston Community College System (2/96 – 8/96) – HRMS functional consulting lead on the implementation project. Prototyped the Payroll and Benefits modules for a multi-campus client using the PS product. HCCS was the first PS client to receive the payroll system that allowed payment of a 12 month contract to be paid over a 9 month period. Two months of this project was actually spent working for PS to debug and fix this part of the system.

Oklahoma University Health Sciences Center (9/95 – 1/96) – HRMS functional consulting lead on the implementation project. Prototyped the Payroll and Benefit modules of the PS system. Developed the PS payroll system to allow for the calculation of the university’s payroll and then create an extract file to be transmitted to the state for actual printing of payroll checks. Created an excel worksheet for employees to use during benefits enrollment to assist in the enrollment process that matched PeopleSoft’s calculations.

PeopleSoft Experience

Student Admin Products - Versions 9.0 & Prior PeopleTools & Other Experience

Student Records	Application Designer
Student Financials	PeopleCode
Admissions	SQR
Financial Aid	Query
	Crystal

Human Resource/Payroll

Payroll Module	COBOL Traces
Benefits Module	Component Interfaces
Benefits Administration Module	Integration Broker

Employers



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- *Independent – (7/98 to Present)*
 - *Crestone Consulting – Consultant (12/97 to 6/98)*
 - *Ramos & Associates / Cambridge Technology Partners - Senior Consultant (5/95 to 11/97)*
 - *Paragon Group, Inc – Payroll & Group Benefits Mgr (2/89 - 5/95)*
 - *Goodman Homes, Inc - Accounting Mgr (6/85 - 2/89)*
 - *Greenbriar Homes, Inc - Accounting Mgr (4/84 - 6/85)*
 - *Centennial Homes Inc - Cost Accounting Sup (2/81 - 4/84)*

Education

The University of Texas at Austin; BBA/Management

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Pepi O. Manieson

pmanieson@solidan.net

Title: Database Administrator

Objective: I am a self-motivated, hard-working professional seeking to obtain a Oracle/PeopleSoft DBA position with opportunities for growth and advancement.

Experience: 05/2006 – present
Database Administrator, Moody Bible Institute, Chicago IL,60610

09/01/2013 – present



Sr. Systems Administrator, Solidan Inc.

Current environments supported:

Product	Tools Release	Middle Tier	Database	O/S
Oracle EBS 12.1.2	N/A	OAS 10g	11.2.0.3	RHEL 5
PeopleSoft Portal 9.1	8.53.04	Weblogic 10.3	11.2.0.3	RHEL 5
PeopleSoft HRMS & CS 9.0	8.53.04	Weblogic 10.3	11.2.0.3	RHEL 5
PeopleSoft CRM 9.2	8.53.04	Weblogic 10.3	11.2.0.3	RHEL 5
PeopleSoft HCM 9.1	8.52.06	Weblogic 10.3	11.2.0.3	RHEL 5

- 24x7 support of Oracle/PeopleSoft instances & databases (dmo/dev/tst/qa/prd).
- Bundle / patch maintenance for EBS, Portal, CS, CRM, HCM.
- Monitoring of systems through OEM with corrective actions setup.
- Proactive performance tuning based on OEM threshold triggers.
- Integration support (SSO & Messaging) between Portal, CS, CRM & HCM.
- CyberSource ePayment support for online bill payment (including multiple merchant processing).
- Maintain address cleansing system integrated with CS (cleanAddress).
- Collaboration with programmers and technical analysts to achieve results.
- Automated refresh of dev/tst/qa/ instances from production (RMAN) based on established schedule.
- Configure and maintain proxy server for PeopleSoft applications.
- Perform some linux sysadmin functions.
- Utilize crontab, perl, shell scripting to accomplish goals.
- Migrate code changes / enhancements into production.
- Work closely and effectively with network/infrastructure staff to resolve firewall or other issues, and to coordinate downtime for system maintenance.

Oracle E-Business Suite Experience:



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- 24x7 support of all Oracle EBS instances (dev/tst/prd).
 - Support and maintain version 11i on Oracle 9i & 10g.
 - Performed upgrade of EBS 11.5.10.2 to EBS 12.1.2.
 - Maintain/monitor instances including cloning, patching, etc.
 - Work with functional and technical experts to achieve goals.

PeopleSoft Experience:

- 24x7 support of all PeopleSoft instances (dev/tst/prd).
- Maintain and upgrade application versions 9.0/9.1 & Tools versions 8.46 - 8.53.
- Experience with OAS, WebLogic and Apache RPS.
- Maintain/monitor instances including cloning, patching, etc.
- Work with functional and technical experts to achieve goals.

Oracle database Experience :

- Install, maintain & support Oracle 9i, 10g & 11g.
- Upgrade from Oracle 9i -> 10g -> 11g.
- Experience in performance tuning.
- Experience with RMAN backups and restores / cloning.
- Experience with OEM Grid Control (both setup and use of it).
- Experience supporting 30+ oracle databases in Grid Control.
- Oracle RAC.

Oracle Grid Control Experience:

- Experience configuring and administering OEM.
- Experience using Grid Control to proactively and reactively manage over 30 databases and application servers.
- Experience using Grid Control to enhance performance in DB.

Virtualization Experience:

- Experience configuring/administering/migrating multiple guests in Oracle Virtualbox.

08/2002 – 05/2006 :

Web Engineer/Developer, Moody Bible Institute, Chicago, IL, 60610

Support the Institute in all Web initiatives. Responsibilities fall in two categories: Web Infrastructure and Web Application Development.



INFRASTRUCTURE:

Cache Server:

- Anticipate/analyze sites that [will] receive substantial traffic and move to cache server.
- Generate monthly web traffic report

Web Server(s) (IIS/APACHE):

- Setup & Configure New Sites, Virtual Dirs., Redirects, Applications, etc.
- Control block of IP range for web use and coordinate with Network team on DNS registration (Internal/External)
- Troubleshoot & Resolve Web Server/Application related performance issues.
- Monitor system resources usage and adjust as necessary (Windows/UNIX)
- Generate monthly web traffic report

Database(s):

- Create & Maintain Databases (Oracle/SQL Server/MySQL) for various IIS/Apache instances
- Monitor system resources usage and adjust as necessary
- Upgrade/Patch various PeopleSoft/Oracle Instances.

DEVELOPMENT:

- Monitor/Enhance/Enforce web authentication/security standards
- Maintain Corporate CMS
- Maintain and build modules for Corporate CMS
- Build and maintain ad hoc applications (intranet/extranet)
- Resolve and Respond to errors/issues sent to webadmin@moody.edu.



- Administrate mailing lists of 30,000+ in LDAP
- Administrate website user accounts of 130,000+ in LDAP

11/2000 – 05/2002

Part-Time Programmer, Moody Bible Institute, Chicago, IL, 60610

- Assist in development of Cognos for Reporting needs.
- Maintain and develop intranet Financial Applications in C/C++.

Skills:

Windows: Server 2008, Windows 7, Office Suite, IIS, SQL Server

UNIX: Linux, Apache, Oracle, PeopleTools, WebLogic, OAS, Tuxedo

Languages/scripts: VB, VBSCRIPT, ASP, ASP.NET, PHP, JSP, HTML, CSS, javascript, Brocade ADX, Apache RPS

Education: 1998 – 2002

Moody Bible Institute – Major: Electronic Communications.

References: - Benjamin Spencer, 708-256-8686

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DANIEL TROSDAHL

Executive Summary:

A **Technical PeopleSoft Developer** and team player with over 13 years of IT experience.



- More than 9 years of experience in technical roles working on a variety of PeopleSoft financials modules.
- Strong presentation, verbal and written communication skills while working directly with end users on defects or enhancements.
- Adept at using SQL tools either to debug data issues or to tune processes.
- Excellent at juggling tasks and priorities to make sure the most import issues are dealt with in a timely, professional manner.
- Over 12 years of working with financial systems.

Tools:

PeopleCode • App Package • SQL • App Designer • Application Engine • Crystal • SQR • Query • Integration Broker • BI Publisher • Component Interface • Golden • SQL Navigator • SQL Developer • Command Editor • Visio • UltraEdit • Version Manager • MVS/COBOL(OS/390) • CICS • RPG • JCL

Versions:

PeopleSoft 8.0, 8.4, 8.9, 9.1, 9.2 (AR, BI, CM, AP, GL, PC, KK, PO, EPro, AM)

Databases:

Oracle (9i, 10g, 11g), DB2

EXPERIENCE:

Highmark, Pittsburgh, PA

Sr. Technical Consultant • 08/2012 to Present

- ❖ Assisted in the upgrade of 8.51.10 to 8.51.15 tool and the application of bundles 12 thru 19. Applied retrofits of existing customizations as well as discovered and fixed delivered and non-delivered post upgrade bugs.



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- ❖ Created a custom App engine process to allocate item activity to a custom billing detail line level. Each Item activity row is divided into a one-for-one match at the billing line level, the program determines the amount that should be allocated against each of these lines.
 - ❖ Conducted training classes on Application Engine and Application package PeopleCode. Instructed teammates on how to debug/trace through this code.
 - ❖ Rewrote two poorly designed SQRs into more efficient reports.
 - ❖ Created a multi-scroll level page for making billing detail adjustments into the custom billing detail tables
 - ❖ Created an SQR for splitting payments between Joint Account business units.
 - ❖ Fielded PeopleSoft questions and provided guidance for more mainframe savvy teammates.
 - ❖ Created a document to track fields coming in from 3 different custom billing applications and where they map into both custom and delivered AR tables.
 - ❖ Managed the quarterly, monthly, and bi-monthly releases of PeopleSoft and DMS migrations into production for the team.
 - ❖ Developed a page for healthcare delinquency with the ability to reprint or recreate delinquency letters and to manually take customers off of delinquency.
 - ❖ Designed and built a custom app messaging process to pull in recon information for delinquency letters.
 - ❖ Conducted initial 9.1-to-9.2 upgrade tasks, including compare report analysis and retrofitting of customized delivered objects.
 - ❖ Rewrote the current Paid-To-Date process to track PTD at a customer level (previously at a custom billing line level) and make the existing program much more efficient.
 - ❖ Created a multi-scroll page for adding/modifying rows to a custom record that “shadows” the delivered customer table, storing additional fields for healthcare reform.



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- ❖ Developed an App engine program for creating a file based upon exchange subsidy discrepancies.

Brookdale Sr Living, Milwaukee, WI

06/2006 to 08/2012

Sr. Applications Developer • 05/2011 to 08/2012

- ❖ Integrated the Wells Fargo one-time credit card system into PeopleSoft Payables. This involved changes to the vendor and PayCycle setup, along with App Package PeopleCode changes within Financial Gateway. An interface to load and track the statuses of these credit card payments was also constructed.
- ❖ AR to GL Cash Clearing recon. Developed a business process and a set of queries to tie AR credit cash clearing accounting entries from the depository tables back to GL and debits from the Treasury bank statements back to GL.
- ❖ Maintain and support all of the various batch schedules using PeopleSoft Jobset functionality.
- ❖ Horizon Bay acquisition and conversion. Set up banking services, converted DD customers and set up a journal interface to load GL information from the legacy system into PeopleSoft GL.
- ❖ Tested and implemented the use of Escheatment functionality for unclaimed property.
- ❖ AP Default project. Changed each entry point into PeopleSoft Payables so that the bank would default from the AP BU setup, however the payment method would default down from the vendor.
- ❖ AM Retirement project. AM needed to retire all of the assets from the Tax book for several of our communities without retiring them from the corporate book. Used the delivered Disposal page and then ran a sql to delete the non-Tax book assets off of the Open Trans table.
- ❖ AM FAD Loader enhancement. Added Invoice, Business Unit AP, and Voucher to the Excel to CI and modified the Component Interface to process the data.



- ❖ Modified the bank account page and the PayCycle to allow for an alternative bank branch address. Certain bank accounts were used for both payables and receivables. In these cases PayCycle would pull from the custom alternate bank branch field and print that address on the check.
- ❖ Created a Database trigger for an issue where an Oprid is terminated but there is still an active recurrence set up in process monitor against that Oprid. The trigger automatically deletes the recurrence from the process scheduler.
- ❖ Helped to test and implement database compression on heavy volume tables like Voucher Acctg line for performance tuning.
- ❖ Created a custom page for the adding and subtracting of business units from the BATCH Oprid runcontrols.
- ❖ Supported E-Pro issues that cropped up due to Commitment Control and Matching.
- ❖ Tools and database upgrade (database from 10 to 11g, tools from 8.48.10 to 8.48.14). Was responsible for the testing of every major financials process and worked with the DBAs to tune processes that ran slow due to optimizer issues.
- ❖ New Bank integrations: Tested and installed a number of data flows between The Private Bank and Brookdale including Payment Scanners, ACH files (both Payables and Direct Debit), ARP, EDI 820 payment files, and file acknowledgements.

Programmer Analyst Lv II • 06/2008 to 05/2011

- ❖ Key member of 12 month PeopleSoft AR and Billing redesign project. Responsible for developing a new lockbox file from Wells Fargo, testing of payment predictor algorithm changes, and implementation of Direct Debits with Wells Fargo bank.
- ❖ Conducted database tuning on several long running processes such as PC_POADJUST and PC_GL_TO_PC.



- ❖ New Bank implementation: Tested and installed a number of data flows between Wells Fargo and Brookdale including Payment Scanners, ACH files (both Payables and Direct Debit), ARP, EDI 820 payment files, and file acknowledgements.
- ❖ Responsible for designing and creating a custom app engine program for sending email remittances to ACH Vendors.
- ❖ Supported various PeopleSoft GL production issues including partially posted journals and Commitment Control errors.
- ❖ Created a custom app engine program to load GL-AP Detail into a physical table for GL reporting purposes. This is because only AP summary information is loaded into GL.
- ❖ Project Costing report cleanup project. Stream-lined several custom crystal PeopleSoft Project Costing reports and their runcontrol pages. Added the ability to run per Project Status.
- ❖ Implementation of Bank of America takeover of LaSalle bank. Coordinated, tested, and implemented changeover of all LaSalle bank services to the new B of A platforms.
- ❖ Treasury bank reconciliation project. Lead the implementation of several rounds of transactional clean up within the PeopleSoft Cash Management module. This included check clearing issues and previous day BAI transactions.
- ❖ Designed and created a custom PeopleSoft page for tracking file directories paths per each test environment. Used to automatically populate file paths on runcontrols including PayCycle.

Programmer Analyst Lv I • 05/2006 to 06/2008

- ❖ Designed and developed all of Brookdale's ERP daily and nightly BATCH schedules using PeopleSoft Jobset functionality.
- ❖ Integrated the DSSI invoice system into PeopleSoft Payables through custom SQR programs and using the EDI Manager functionality



- ❖ Integrated the Fedex Direct Link invoice system into PeopleSoft Payables through a set of SQR programs and EDI Manager functionality.
- ❖ Assisted in the implementation of the PeopleSoft Project Costing module
- ❖ Core member of the technical team to implement the PeopleSoft Cash Management module and turn various bank services on for Bank of America.
- ❖ Supported PeopleSoft Direct Debit and custom invoice/statement hybrid process out of Billing.
- ❖ Rewrote a custom SQR program used to pull AR balance information or AR activity that does not exist in Billing to show up on monthly hybrid-statements.
- ❖ Supported PeopleSoft Payables production issues including pay cycle and payment issues.

Labcorp. of America, Burlington, North Carolina

Programmer Analyst • 09/2001 to 05/2006

- ❖ Was a key member on a team of consultants and FTEs to convert mainframe Payables, Ledger, Purchasing, Fixed Assets, and Inventory modules over to 8.4 PeopleSoft Financials.
- ❖ Mentored Mainframe COBOL co-workers, helping them to better understand PeopleSoft.
- ❖ Designed PeopleSoft Asset Management reports using SQR.
- ❖ Built AP Interfaces for vendor invoice files from legacy Mainframe system into Peoplesoft Payables. Also created technical and user documentation describing the functional and technical flow of these processes using Visio, MSWord, EXCEL, and PMOnline.
- ❖ Created a one-time vendor interface for bringing in refunds from accounts receivable system.
- ❖ Used Query database tool (IBM Command Editor and the Query Viewer) for troubleshooting production issues.



- ❖ Provided Production Support of AP, GL, and PO business system applications for MVS COBOL.
- ❖ Analyzed functional problems and developed programming solutions for both the mainframe and PeopleSoft PIA architecture environments.

City of Fargo, Fargo, North Dakota

Programming Internship • 01/2001 to 06/2001

- ❖ Worked on conversion of RPGII to RPGIII
- ❖ Applied simple fixes to functional problems
- ❖ Performed troubleshooting of software and computer glitches
- ❖ Installed software and service packs for windows operating systems on user computers

EDUCATION:

North Dakota State College of Science, Wahpeton, ND

Associate of Science, Computer Programming (2001)

SPECIALIZED TRAINING:

- ❖ PeopleSoft Release 8.44 – PeopleTools 1 and 2 accelerated (on-site PeopleSoft Instructor)
- ❖ PeopleSoft Release 8.44 – Application Engine (on-site PeopleSoft Instructor)
- ❖ PeopleSoft Release 8.44 – PeopleCode (on-site PeopleSoft Instructor)
- ❖ PeopleSoft Release 8.44 – Component Interface (on-site PeopleSoft Instructor)
- ❖ PeopleSoft Release 8.4 – SQR (PeopleSoft Training Facility, Washington DC)
- ❖ PeopleSoft Release 8.4 – Crystal/Query (PeopleSoft Training Facility, Atlanta, GA)
- ❖ PeopleSoft Release 8.9 – Project Costing (PeopleSoft Training Facility, Atlanta, GA)
- ❖ PeopleSoft Release 9.1 – Fixed Assets (Oracle Training Facility, Chicago, Ill)

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Paul Zolnierczyk

EXPERIENCE

Software Engineer, Infinity Interactive Inc. — Jan 2012 - Present

Software Engineering Consultant primarily using Java and C# to build and support web applications for our clients and partners. Most projects typically require integrating web services into web applications while the rest of the projects either require support and enhancements or development that covers the entire software development life cycle. Effective communications with clients and partners is a requirement.

Senior Software Engineer, Loyola University Chicago — June 2008 - Dec 2011

Designed and developed University Applications that supported the needs and requirements of University Students, Staff, Faculty, Alumni and Prospective Students. Using primarily Java (as well as other JVM languages like Groovy), Oracle DB, Apache Tomcat as the primary stack, I've developed complete web applications such as the Undergraduate Admissions Application, integrated 3rd party systems such as the DocFinity Enterprise Content Management system via an API as well as consumed web services in HTML5 mobile applications created as well as provided XML web services to third party clients.

Applications Systems Analyst, Loyola University Chicago — August 2006 - June 2008

Systems Administrator and PeopleCode developer for the University's Oracle/PeopleSoft Campus Solutions system hosted in an AIX and UNIX environment. The Campus Solutions system is the enterprise portal faculty, staff and students access on a daily basis to access financial aid, register for classes, enter and update bio/demo data etc.

EDUCATION

Arizona State University — Bachelor of Science in Engineering, Computer Systems Engineering

Loyola University Chicago — Master of Science, Software Technology

SKILLS

Java EE, Groovy, Grails, Spring MVC, Struts, Web Services, Oracle Database, JUnit, Git, CVS, Subversion, Unix/Linux/AIX, Shell Scripting, WebLogic, JBoss, Eclipse IDE, SoapUI

REFERENCES

References will be provided upon request

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ERIC WEEMS



Key Skills

- Financial Aid Operations
- Regulatory Compliance
- Process Redesign
- Risk & Vulnerability Assessments
- Communication Evaluation and Design
- System Integration Planning
- Retention Strategies

Education

- Loyola University, Chicago, IL
M.Ed. in Higher Education, 2004
- Augustana College, Rock Island, IL
BA in Accounting and Finance, 1987

Professional Memberships

- National Association of Student Financial Aid Administrators (NASFAA)
- Midwest Association of Student Financial Aid Administrators (MASFAA)
- Illinois Association of Student Financial Aid Administrators (ILASFAA)

HIGHER EDUCATION CONSULTANT

Expert in Enrollment Management and Financial Aid

Experienced financial aid administrator with extensive operational experience; Expert at assessment of business processes and developing solutions to best utilize available technology to improve student service and processing efficiency; Decisive leader with excellent communication and team-building focus; Creative problem-solver.

Technology Summary

- Student Systems:** Oracle PeopleSoft (Financial Aid and Admissions); Ellucian Colleague (Financial Aid and Admissions); Ellucian Banner (Financial Aid); College Board PowerFAIDS (Financial Aid); College Board Net Partner (Student Portal), Three Rivers CAMS (Financial Aid)
- Imaging Systems:** Imagio; ImageNow
- Software:** MS Office (Word, Excel, Outlook, Access, PowerPoint)

Financial Aid Experience

- Third Coast Higher Education, Chicago, IL
Higher Education and Financial Aid Consultant, 2012-Present
- Loyola University, Chicago, IL
Director, Financial Aid Office, 1997-2012
- Southern Illinois University, Carbondale, IL
Assistant Director, 1995-1997
- Illinois Student Assistance Commission, Deerfield, IL
Client Services Representative, 1990-1995
- KPMG Peat Marwick, St. Louis, MO/Peoria, IL
Staff Accountant, 1987-1990

Accomplishments

- **Risk Assessment Consultation:** Assisted community college systems, four-year private and four-year public schools in performing overall risk assessment reviews of financial aid operation. After identifying areas of weakness, guided schools in developing corrective action in advance of program and audit reviews.
- **System Implementation:** Served as functional lead to implement People Soft (v 8.0 and 9.0) and Colleague admission and financial aid systems at two institutions. Developed process mapping to reengineer existing routines to best utilize system delivered functions, using an enrollment management and retention approach. Served on core planning groups to oversee implementation and update of systems. Devised processes ensuring compliance with regulatory requirements.
- **Strategic Enrollment Management:** Directed data analysis and predictive modeling to guide financial aid leveraging initiatives at selective four-year private institution. Under leadership, enrollment doubled from 825 to 2150 and retention increased to 85% while keeping overall discount rate at 35-37%.
- **Training:** Led creation of training curricula to ensure understanding of financial aid lifecycle, ensuring compliance with federal laws and regulations.
- **Retention Strategies:** Assess current retention activities, generate buy-in with key campus personnel, and create strategies to improve student success.

Able to Travel Extensively ● Available for Full-Time & Contract Assignments ● References Available Upon Request





FLORIDA DEPARTMENT OF STATE
DIVISION OF CORPORATIONS

Attached are the forms and instructions to register a foreign profit corporation to transact business in Florida. The requirements are as follows:

- Pursuant to section 607.1503(1), Florida Statutes, the attached application must be completed in its entirety.
- The corporation must submit an original certificate of existence, no more than 90 days old, duly authenticated by the Secretary of State or the proper official having custody of corporate records in the state or country under the law of which it is incorporated. A photocopy is not acceptable. If the certificate is in a foreign language, a translation of the certificate under oath of the translator must be submitted.
- There is a \$70.00 registration fee and a letter of acknowledgment will be issued free of charge upon registration.
- Certification fees are optional. Please submit an additional \$8.75 if a certificate of status is needed. The fee for a certified copy of the application is \$8.75 (plus \$1 per page for each page over 8, not to exceed a maximum of \$52.50). Please check the appropriate box on the COVER letter and send one check for the total amount made payable to the Florida Department of State.
- The COVER letter included in this packet should be completed and submitted along with the certificate, application and check. Both the mailing address and courier address are noted in the COVER letter.
- **Important Information About the Requirement to File an Annual Report**
All Profit Corporations must file an Annual Report yearly to maintain “active” status. The first report is due in the year following formation. The report must be filed electronically online between January 1st and May 1st. The fee for the annual report is \$150. After May 1st a \$400 late fee is added to the annual report filing fee. “Annual Report Reminder Notices” are sent to the e-mail address you provide us when you submit this document for filing. To file any time after January 1st, go to our website at www.sunbiz.org. There is no provision to waive the late fee. Be sure to file before May 1st.

Any further inquiries concerning this matter should be directed to the New Filing Section by calling (850) 245-6052 or writing the New Filing Section, Division of Corporations, P.O. Box 6327, Tallahassee, FL 32314.

COVER LETTER

TO: New Filing Section
Division of Corporations

SUBJECT: Solidan Inc.

Name of corporation - must include suffix

Dear Sir or Madam:

The enclosed "Application by Foreign Corporation for Authorization to Transact Business in Florida," "Certificate of Existence," or "Certificate of Good Standing" and check are submitted to register the above referenced foreign corporation to transact business in Florida.

Please return all correspondence concerning this matter to the following:

Dan Moran

Name of Person

Solidan Inc.

Firm/Company

132 Cypress Dr.

Address

Bolingbrook, IL 60440

City/State and Zip code

info@solidan.net

E-mail address: (to be used for future annual report notification)

For further information concerning this matter, please call:

Dan Moran

Name of Person

at (630) 660-2274

Area Code & Daytime Telephone Number

STREET/COURIER ADDRESS:

New Filing Section
Division of Corporations
Clifton Building
2661 Executive Center Circle
Tallahassee, FL 32301

MAILING ADDRESS:

New Filing Section
Division of Corporations
P.O. Box 6327
Tallahassee, FL 32314

Enclosed is a check for the following amount:

- \$70.00 Filing Fee \$78.75 Filing Fee & Certificate of Status \$78.75 Filing Fee & Certified Copy \$87.50 Filing Fee, Certificate of Status & Certified Copy

**APPLICATION BY FOREIGN CORPORATION FOR AUTHORIZATION TO TRANSACT
BUSINESS IN FLORIDA**

IN COMPLIANCE WITH SECTION 607.1503, FLORIDA STATUTES, THE FOLLOWING IS SUBMITTED TO REGISTER A FOREIGN CORPORATION TO TRANSACT BUSINESS IN THE STATE OF FLORIDA.

1. **Solidan Inc.**

(Enter name of corporation; must include "INCORPORATED," "COMPANY," "CORPORATION," "Inc.," "Co.," "Corp.," "Inc.," "Co.," or "Corp.")

(If name unavailable in Florida, enter alternate corporate name adopted for the purpose of transacting business in Florida)

2. **Illinois, USA**

(State or country under the law of which it is incorporated)

3. **36-4569832**

(FEI number, if applicable)

4. **2/25/2005**

(Date of incorporation)

5. _____

(Duration: Year corp. will cease to exist or "perpetual")

6. _____
(Date first transacted business in Florida, if prior to registration)
(SEE SECTIONS 607.1501 & 607.1502, F.S., to determine penalty liability)

7. **132 Cypress Dr. Bolingbrook, IL 60440**

(Principal office address)

132 Cypress Dr. Bolingbrook, IL 60440

(Current mailing address)

8. **Conduct Computer Consulting**

(Purpose(s) of corporation authorized in home state or country to be carried out in state of Florida)

9. Name and street address of Florida registered agent: (P.O. Box NOT acceptable)

Name: **Dale Smith**

Office Address: **2809 Keystone Dr.**

Orlando, Florida **32806**
(City) (Zip code)

10. **Registered agent's acceptance:**

Having been named as registered agent and to accept service of process for the above stated corporation at the place designated in this application, I hereby accept the appointment as registered agent and agree to act in this capacity. I further agree to comply with the provisions of all statutes relative to the proper and complete performance of my duties, and I am familiar with and accept the obligations of my position as registered agent.

(Registered agent's signature)

11. Attached is a certificate of existence duly authenticated, not more than 90 days prior to delivery of this application to the Department of State, by the Secretary of State or other official having custody of corporate records in the jurisdiction under the law of which it is incorporated.

12. Names and business addresses of officers and/or directors:

A. DIRECTORS

Chairman: Dan Moran

Address: 132 Cypress Dr
Bolingbrook, IL 60440

Vice Chairman: _____

Address: _____

Director: _____

Address: _____

Director: _____

Address: _____

B. OFFICERS

President: Dan Moran

Address: 132 Cypress Dr.
Bolingbrook, IL 60440

Vice President: _____

Address: _____

Secretary: _____

Address: _____

Treasurer: _____

Address: _____

NOTE: If necessary, you may attach an addendum to the application listing additional officers and/or directors.

13. _____

Signature of Director or Officer

The officer or director signing this document (and who is listed in number 12 above) affirms that the facts stated herein are true and that he or she is aware that false information submitted in a document to the Department of State constitutes a third degree felony as provided for in s.817.155, F.S.

14. Daniel J Moran

(Typed or printed name and capacity of person signing application)