

**AGENDA ITEM 33**

Consider awarding an HR/Payroll software implementation services contract to vendor meeting the County's selection criteria.

Moved: **Judge Doerfler**

Seconded: **Commissioner Boatright**

Motion: To award an HR/Payroll software implementation services contract to vendor meeting the County's selection criteria, AST Corporation, in the amount of \$330,000.

Vote: **5 - 0**

< Attachment >

**PROPOSAL**  
**Williamson County**

*Response to RFP No. 03WC902*

⌘ *Payroll Software Implementation Services* ⌘

**Submitted By:**

Applications Software Technology Corporation



**Due Date & Time:**

March 27, 2003 – 2:00 PM CST

TABLE OF CONTENTS

1. PROPOSAL FORM.....4

2. EXHIBIT A.....5

3. INTRODUCTION.....7

4. QUALIFICATIONS.....9

5. REFERENCES.....11

6. SERVICE PLAN .....15

Methodology ..... 15

Staffing Plan..... 18

Resumes ..... 19

Implementation Plan..... 33

Training Plan..... 35

Deliverables Required of the County ..... 36

Scope of Work..... 37

Applications Software Technology Corporation

March 21, 2003

Bob Space  
Purchasing Director  
Williamson County  
710 Main Street, Suite 303  
Georgetown, TX 78626

Reference: RFP# 03WC902, Payroll Software Implementation Services

Dear Mr. Space

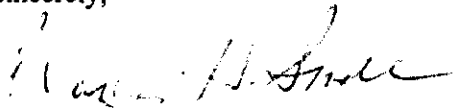
AST Corporation is pleased to submit this proposal in response to the requirements called for in Williamson County's formal Request For Proposal number 03WC902, Payroll Software Implementation Services.

We are a corporation with a growing public sector practice focused on assisting government clients in Oracle Applications implementation and upgrade projects, AST Corporation is confident that we are well suited for the County's proposed HR and Payroll implementation requirements.

As the Vice President of Business Development at AST Corporation, I attest to the accuracy of the proposal and certify that the terms of this proposal will remain firm for 90 days from the proposal due date.

We believe that after you have reviewed this proposal, we will have conveyed our understanding of your needs while at the same time validate that we are qualified to assist the County in this important Oracle HRMS/Payroll Applications project, just as we have done for other city and County governments.

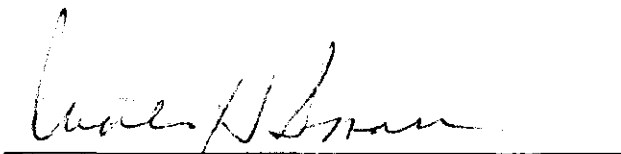
Sincerely,



Martin H. Small  
VP, Business Development

**1. Proposal Form****PAYROLL SOFTWARE IMPLEMENTATION SERVICES****PROPOSAL NUMBER: 03WC902****PROPOSAL OPENING DATE & TIME: MARCH 27, 2003 – 2:00 PM**

The undersigned, by his/her signature, represents that he/she is authorized to bind the proposer to fully comply with the terms and conditions of the attached Request for Proposal, and Specifications for the amount(s) shown on the accompanying Proposal sheet(s). By signing below, you have read the entire document and agreed to the terms therein.

**NAME OF PROPOSER:** Applications Software Technology Corporation**Mailing Address:** 1755 Park Street, Suite 115**City:** Naperville **State:** IL **Zip:** 60563**Email Address:** msmall@astcorporation.com**Telephone:** (630) 778-1180 **Fax:** (630) 778-1179  
Signature of Person Authorized to Sign Proposal**Date of Proposal:** 03/21/03**Name and Title of Signer:** MARTIN H. SMALL (VP, Business Development)  
(Please Print or Type)

**DO NOT SIGN OR SUBMIT THIS FORM**  
**WITHOUT READING ENTIRE DOCUMENT**

**THIS FORM MUST BE COMPLETED, SIGNED AND RETURNED WITH PROPOSAL**

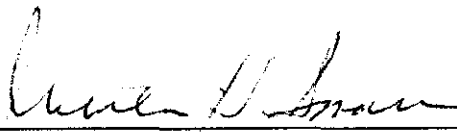
2. Exhibit A

1) Offeror Identification

Company Name	Applications Software Technology (AST) Corporation
Address	1755 Park Street, Suite 115
City	Naperville
State	Illinois
Zip	60563
Phone	(630) 778-1180
Fax	(630) 778-1189
Email	info@astcorporation.com

2) Signature of Authorized Agent

MARTIN H. SMALL  
Authorized Agent (PRINT)

  
Signature

03/21/03  
Date

3) Pricing offered for Oracle HR/Payroll Phase I Implementation:

ITEM	DELIVERABLE	PRICE
1	Requirement Analysis	42,200
2	Install and Configure Test Environment	37,300
3	Applications Testing	80,600
4	Training	30,800
5	Install Production Environment	10,700
6	Post Implementation Support	16,400
7	Travel Cost	30,500
TOTAL:		\$ 248,500

Pricing offered for Oracle HR/Payroll Phase II Implementation:

ITEM	DELIVERABLE	PRICE
1	Requirement Analysis	36,300
2	Install and Configure Test Environment	29,700
3	Applications Testing	82,300
4	Training	38,700
5	Install Production Environment	14,500
6	Post Implementation Support	16,400
7	Travel Cost	24,100
TOTAL:		\$ 242,000

4) **Alternate Pricing – Both Phases of the project executed together:**

Since the County has indicated its willingness to explore other options and possibilities to reduce the overall project cost, AST would like to suggest the alternative of implementing both phases of the project together. This would result in better utilization of both the County and consulting resources and reducing the overall project timeframe from a projected 14 months to approximately 9 months. During the phase I of the project (HR and Payroll) the analysis has to take into account the planned Phase II (Internet Expense, Advanced Benefits and SSHR) so that the setups and decisions do not adversely affect the planned modules. The alternate approach suggested here will utilize the time spent on the analysis much more efficiently and will have significant help in reducing the time spent on user interviews, conference room pilot (prototype) and overall technical and functional tasks.

We feel very confident in our ability to execute this approach with the county staffing levels indicated in the Exhibit D of the RFP and do not foresee any significant increase in risk to the County in adopting this approach.

The estimated cost of this alternate approach is shown below:

ITEM	DELIVERABLE (Phase I & II Combined)	PRICE
1	Requirement Analysis	78,500
2	Install and Configure Test Environment	55,000
3	Applications Testing	98,100
4	Training	62,800
5	Install Production Environment	23,500
6	Post Implementation Support	31,400
7	Travel Cost	43,500
TOTAL:		\$ 392,800

As is evident this alternate approach results in a savings of approximately 20% over the conventional two-phase approach and therefore we would like to recommend to the County to consider this approach for the project. We are willing to make available the proposed AST project team and senior management for a discussion on the implementation approach or any other aspect of this proposal.

### 3. Introduction

Incorporated in 1995, Applications Software Technology (AST) Corporation is a full-service Oracle Applications consulting company committed to helping clients realize the full potential of Oracle Applications. AST has had a dedicated consulting practice focused on Oracle Public Sector Applications since its inception and has gained a reputation for providing high value implementation and upgrade solutions for the unique needs of public sector organizations. Approximately 75% of our business is conducted with Public Sector entities like the City of Chicago, the City of Oakland, the State of California, Marion County, Oklahoma County and Waukesha County.

AST Corporation is fiscally sound, and has operated for over seven years with consistent and manageable growth. AST has sufficient operating capital and revenue streams to withstand market fluctuations, if it should occur. AST has implemented or is currently engaged on Oracle Applications 11i projects for City and County governments as large as the City of Chicago, Marion County, Waukesha County, Oklahoma County, and King County and has a proven ability to manage and execute large and complex projects.

AST is a member of the Oracle Partner Network, and participates actively in the OAUG, AppsWorld and regional Oracle user groups. AST has valuable partnerships with several software vendors (including Oracle, Optio and Noetix) that we utilize to the customers benefit in finding solutions for their unique needs, while resolving issues and bugs rapidly. Several AST employees have previously worked for Oracle Corporation both in the development and consulting divisions, giving them an in-depth knowledge and insight into the architecture and features of Oracle Public Sector Applications Release 11i.

AST is a one-stop source for comprehensive technical, functional, training, support and project management skills and methodology. If selected as the implementation partner, the County can count on AST to perform the following value addition for this important project:

- Provide in-depth functional knowledge, including 11i specific expertise for each of the modules planned in both the phases of the project
- Leverage our alliance with companies like Oracle, Optio and Noetix to the County's benefit and act as the County's advocate in resolving issues with any software/hardware vendor
- Leverage our experience and relationship with other County and City governments that use Oracle HRMS Applications in identifying and recommending solutions to the Williamson County 11i HRMS implementation project
- Provide full documentation by preparing County specific setup and design documents
- Guide the County's project team not only in the new 11i features of the module being implemented but also in the customization and interfaces
- Work hand-in-hand with the County's management to execute the project smoothly
- Provide a *complete and effective* knowledge transfer to the County personnel

AST not only delivers quality and innovative solutions for the customers, we have pioneered some very unique and helpful self-service tools for the Oracle Applications user community and deployed them on the web for free use. Some examples are:

*Project Budget Calculator, allows customers to calculate the cost, resources and timeline of their Oracle Applications implementation and upgrade project. The users can create multiple versions and scenarios of their project and organizational situations and compare the cost online.*

*Solo Upgrade Checklist enables organizations that are contemplating an upgrade to 11i using internal resources to measure their company's proficiency and capabilities in this major effort.*

These self-service tools are available on AST's website [www.astcorporation.com](http://www.astcorporation.com) (under Products Section) and is proof of our accomplishments in the Oracle Applications arena. We also maintain a rich repository of innovative solutions and deliverable templates, which cuts short the time required to satisfy product functionality gaps.

AST puts great emphasis on the quality of the project deliverables. Quality Assurance is an integral part of the EDM methodology to be used by AST on the project and AST team members understand that quality is measured and evaluated as distinct requirement in all deliverables. Every Oracle Applications implementation project undertaken by AST goes through our well documented, proven and client appreciated methodology - Enterprise Domain Model (EDM) and greatly facilitates the implementation process. An overview of the EDM methodology is included in the "Service Plan" section of this proposal.

We have carefully studied the county's RFP and involved the proposed project team in planning, estimating and responding to the RFP so that they are familiar with the County's objectives in implementing the Oracle HRMS Applications. AST team members are very senior level Oracle consultants who fully understand the organizational objectives and goals and are adept at translating system features and technology into business goals. In working on every deliverable the AST team will keep the focus on -

- Increasing the reliability of the payroll process
- Provide true integration between the Payroll and the existing Financials/Grants Modules
- Decentralize specific HR tasks while streamlining existing manual processes
- Deliver HR information to County personnel in a timely and cost effective manner

A thorough understanding of the County's needs, an experienced, cohesive and strong team and excellent references from previous customers are some of the differentiating factors that AST has to offer.



4. Qualifications

AST Corporation has an exclusive focus on Oracle Applications and has been implementing Oracle Applications for public sector organizations since its inception over seven years ago. The proposed AST project team has strong Release 11i Public Sector HR and Payroll experience and is well versed with the County and City Government environments. We have successfully completed over 15 11i implementation and upgrade projects including HR, Payroll, Self-service HR, Internet Expense and Advanced Benefits, the modules being implemented at the County. AST has gained a reputation for providing high value business strategies and solution for the unique needs of the Public Sector community.

Some of our Public Sector customers where we have provided similar services and/or are currently engaged include:

- City of Chicago, IL
- City of Oakland, CA
- City of Omaha/Douglas County, NE
- City of San Marcos, TX
- Fermi National Accelerator Laboratory (Fermilab), IL
- Greater Orlando Aviation Authority, FL
- King County, WA
- Marion County, OR
- Oklahoma County, OK
- State of California, Administrative Offices of the Court, CA
- Waukesha County, WI

We understand the importance of a consistent team and continuity of staff in making the project successful and cost effective. AST provides a steady team throughout a project and as a result, all of our projects have been completed within budget and on time. In addition we make every effort to make available, the consultants formerly engaged at a particular client site if or when a future need arises at that site. The County can expect that AST's team will provide an in-depth knowledge transfer to the County's staff so that the system will run smoothly long after the project is complete. This approach is a hallmark of the overall services we provide as our references can attest.

The project manager assigned to this engagement, Mr. Gogi Reddy has managed over 6 public sector Oracle Applications projects and most of them included Oracle HRMS Applications. He has lead AST's project team for such public sector customers as the City of San Marcos, the City of Oakland, State of California (AOC), and Greater Orlando Aviation Authority. Other team members are equally suited for and experienced with 11i HR and Payroll implementation in Public Sector organizations, as will be evident from the details provided in their resumes enclosed.

The proposed functional lead Mr. Gene Jannece has worked for over 20 years in the HR and Payroll arena. Most recently he has been the functional lead on two public sector Oracle HRMS Applications project – City of Salem and Oklahoma County. Mr. Jannece's extensive experience with the HR and Payroll Applications in environments similar to the Williamson County will be a great asset to the project. Under the "Service Plan" section we have included detailed resumes of all the proposed consultants as well as provided a summary table to provide a management view

of their qualifications and experience. A description of AST's 11i projects is also provided within the "References" section.

Our consultants have chaired sessions on "Public Sector Applications", "Workflow" and other Oracle Applications 11i topics at OAUG and other forums and score high marks relative to the unique aspects of public sector upgrades and implementations, including encumbrance accounting, budgetary control, grants accounting and public sector budgeting.

We understand that the Oracle 11i HRMS implementation undertaken by the Williamson County is a major project for the County and has critical bearing on the eventual success and user acceptance of the overall Oracle Applications system. A successful track record of the consulting partner company in similar projects, and a skilled and experienced consulting team is a fundamental need for such a project. AST has had a dedicated consulting practice focused on Oracle Public Sector Applications since its inception and has gained a reputation for providing high value implementation and custom solutions for the unique needs of public sector organizations.

The proposed team not only has excellent Public Sector and Oracle HRMS experience, but also has a comprehensive functional and technical expertise in all Oracle Applications modules including Financials, Projects and Grants.

At AST, we fully understand that quality is everyone's responsibility and strive to achieve quality excellence in all areas including:

- Approach & Strategy
- Project Management
- Documentation
- Analysis & Design
- Programming
- Testing
- Training & Knowledge Transfer
- User Interaction & Communication

With a quality and customer service oriented team that has an extensive public sector background, a 100% match in similarity of experience with the County's Oracle 11i HRMS project and a company that has a 100% success rate in all Oracle Applications projects, AST stands uniquely qualified to partner with the County.

5. References

A brief description of the projects, services performed and project duration with the contact person's information for some of our Public Sector customers are listed in the "Table3 – References" below. These references will attest to the quality of work performed by AST and the high level of customer satisfaction we strive to achieve on every engagement.

Client Organization	Name & Contact Information	Service Dates	Modules Used & Project Scope
1 City of Chicago, IL	<b>IAN WEBSTER</b> <i>Assistant Controller</i> 312-744-4204 <a href="mailto:iwebster@cityofchicago.org">iwebster@cityofchicago.org</a>	08/01 – Present	Oracle Public Sector Applications 11i; Financials (GL, AP, AR, FA, PO, CM), HRMS (HR, PAY, OTL), Projects/Grants and Custom Modules.  In addition to the implementation services for Oracle Applications 11i AST created several custom Workflows, Alerts, Forms and Reports to achieve the business objectives of the City. AST consultants also provided user training and production migration assistance. AST is currently engaged at the City for post-production support.
2 City of San Marcos, TX	<b>RAMONA BROWN</b> <i>IT Director</i> 512-393-8115 <a href="mailto:ramona_brown@ci.san-marcos.tx.us">ramona_brown@ci.san-marcos.tx.us</a>	06/01 – 12/01	Oracle Public Sector Applications 11i (GL, AP, AR, FA, PO, CM)  Upgrade of 10.7 SC to 11i, Migration and integration of customizations to 11i, Implementation of new module for Procurement Card and creation of several customizations and interfaces to 11i. User Training and knowledge transfer of 11i and Custom Software features.
3 Marion County, OR	<b>JOHN MARGARONIS</b> <i>Director, IT</i> 503-373-4412 <a href="mailto:jmargaronis@co.marion.or.us">jmargaronis@co.marion.or.us</a>	05/02 – 01/03	Oracle Public Sector Applications 11i HRMS (HR, Payroll, Self-Service HR, Oracle Time and Labor; Financials (GL, AP, AR, FA, PO, CM), Oracle Projects.  Services provided by AST included - upgrade to 11i and implementation of ORL module. Integration of customizations and various interfaces to Oracle Applications 11i.
4 Waukesha County, WI	<b>WAYNE NAEGELE</b> <i>Project Manager</i> 262-548-7603 <a href="mailto:wnaegele@waukeshacounty.gov">wnaegele@waukeshacounty.gov</a>	04/01 – 01/03	Oracle Applications 11i Financials (GL, AP, AR, FA, PO, CM), Human Resources, Projects and Grants modules.  Oracle Applications 11i, Customizations of Workflows, Forms and Reports. Requirements Analysis for implementation of new modules in 11i including Public Sector Budgeting, Projects and Grants. User training on customizations and 11i.

In addition to the references listed above we are also including below, letters of recommendations from some of the clients where we have completed 11i engagements in the recent past and that are relevant to the personnel proposed on this project.



City of Chicago  
Richard M. Daley, Mayor

Department of Business and  
Information Services

Christopher C. O'Brien  
Chief Information Officer

Suite 2700  
50 West Washington Street  
Chicago, Illinois 60602  
(312) 744-5844  
(312) 744-9004 (FAX)

<http://www.cityofchicago.org>

August 28, 2002

Mr. Pravin Kumar  
President  
Applications Software Technology Corporation  
1755 Park Street, Suite 115  
Naperville, IL 60563

Dear Mr. Kumar

Since April of 2001 AST Corporation has been providing Oracle Applications technical and functional services to the City of Chicago with outstanding results. AST has demonstrated the ability to step into difficult situations and deliver timely solutions. Each of the resources you have provided has performed their tasks with obvious skills, that many firms promise but few deliver.

As the implementation of the Oracle 11i system nears its expected "Go Live" date, much of the work the City has contracted with AST Corporation to perform will be winding down. I do know that in speaking with our Deputy Chief Information Officer, Ms. Kathryn Kustermann she has expressed a desire to look to AST for assistance in transitioning to the new system and ongoing Post Production support.

If the past performance of AST Corporation as provider of specialized Oracle solutions is any indication of what lays ahead, I am comforted to know that some of the toughest challenges that may arise will be dealt with to our complete satisfaction. Keep up the good work!

Sincerely,

Chris O'Brien  
Chief Information Officer





January 18, 2002

Mr. Pravin Kumar  
Vice President  
Applications Software Technology Corporation  
1755 Park Street Suite 115  
Naperville, IL 60563

Dear Mr. Kumar,

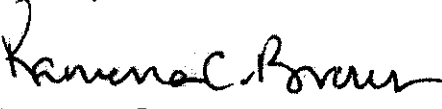
The City of San Marcos wishes to express our complete satisfaction over the Oracle Financials 11i Upgrade and the role that Applications Software Technology Corporation (AST) played in getting the application up and running. The City's upgrade went smooth and on schedule!

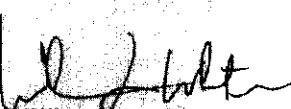
Through the team people that you placed in San Marcos, we were able to accomplish everything that we had set out to achieve. Rarely, does that happen in technology contracts and you should be very proud of your employees. Gogi Reddy, Abhijit Dhar, Sudhakar Lakkoju, and Chin Yang did quality work and training in order to make us secure in the fact that we know the application and can fix any problem.

We personally want to thank Gogi Reddy for the job as Project Manager. He demonstrated those skills that lead to a good Project Manager. He is a true asset to your corporation.

Again, thank you very much for being the kind of corporation that the City of San Marcos, Texas can recommend for future consulting jobs.

Sincerely,

  
Ramona C. Brown  
Director of Information Technology

  
William L. White  
Director of Finance

C: Gogi Reddy, Abhijit Dhar, Sudhakar Lakkoju, Chin Yang



Delta Dental Plan of Minnesota

P.O. Box 9304

Minneapolis, Minnesota 55440-9304

(651) 406-5900 or (800) 328-1188

www.deltadental.org

Applications Software Technology Corporation  
1755 Park Street  
Suite 115  
Naperville, IL 60563

Samantha Oliver  
Financial System Manager  
Delta Dental Plan of Minnesota  
3560 Delta Dental Drive  
Eagan, MN 55122

February 18, 2002

Dear Shaji Zechariah:

Srini began his assignment at Delta Dental the end of March 2001. During his time here he was integral in making the 11i upgrade successful.

I'm going to try and detail what Srini did, but it would be easier to say what he didn't do. Every time we needed technical assistance in any area, we called on his expertise and he was able to resolve the problem without delay. I'll try to give an overview of what he worked on, but I'm sure I won't be doing him justice. Listed below are some of his accomplishments:

- Able to run and troubleshoot the scripts needed to drop the additional schemas
- Ran adadmin to convert applications to multi-org
- Compiled and distributed the documentation on the changes in the system from 10.7 to 11.5.3
- Performed the first conversion of the database from 7.3.4 to 8.1.6 and assisted as needed on the additional conversions
- Installed 9ias server to run the custom applications
- Created the technical system diagram for the Oracle Financial and Oracle Custom Applications
- Investigated and resolved custom application printing problems
- Performed the initial installations and troubleshooting of ADI
- Performed the initial conversion of the Oracle Financials to Multiple Reporting Currencies
- Resolved MS Access problem with being able to connect to and query on the database
- Resolved copy and paste and screen printing problems on Win95 and again on Win2000
- Investigated and successfully resolved a plethora of issues using Metalink and Oracle phone support

As you can readily see, Srini was able to resolve our problems in almost any area that we called on him to assist. And, we called on him often. Whenever we put a challenge in front of him, Srini would work on the problem until it was completed, often working nights and weekends to make it happen. Without him the project would have eventually been a success, but we would not have been able to accomplish it in the same time frame. We were fortunate to have such a talented and hard working person on our team. He made a lot of friends here and we were sorry when the project was completed and he had to go. I would recommend him for any position and I would be happy to have him return when the need arises in the future.

Sincerely Yours,

A handwritten signature in cursive script that reads "Samantha K. Oliver".

Samantha K. Oliver

## 6. Service Plan

An Oracle Applications 11i implementation project can be a challenging exercise particularly if the application is rolled out to a large number of users. Success of such a project is heavily dependent on careful planning, thorough analysis, effective project management, and extensive testing of the software solution. AST has a long history of successfully managing complex Oracle Applications implementation projects and will provide the subject matter expertise, project management and infrastructure/technical experience necessary to ensure a successful on-time completion of the Oracle 11i HRMS Applications implementation for the Williamson County. AST's approach will ensure that there is minimal disruption of business during the production migration process and the demand on user time is well planned and kept to a minimum.

The implementation process consists of several steps during which we need to manage interactions with the County's project managers, end users, technical personnel and software vendor's support organizations. In order to complete this complex process in the allocated time, it is critical to have the following:

- A project plan with all the detailed steps
- Project team members who are able to make decisions quickly
- Effective technical support from internal staff as well as Oracle Support
- Oracle recommended infrastructure both for database and application server
- Certified versions of Oracle Applications, tools and third party software
- Effective support from the County's IT infrastructure support team

AST strongly believes that the success of an Oracle Applications upgrade project depends, to a great extent, on the planning, approach and methodology adopted. In this respect, the methodology and project plan discussed below will be the roadmap of how the project would be planned and executed. We are providing a description of the methodology to be followed for the implementation project, and will follow up with a detailed work plan and highlights of the implementation approach adopted by AST on similar projects.

### ***Methodology***

Over the years AST has developed a distinct software implementation methodology and used them on several successful Oracle Applications implementation projects. EDM (Enterprise Domain Model) is our specialized methodology geared toward Oracle Applications implementations and contains Oracle Applications specific phases, deliverables, templates, sizing spreadsheets and scripts. AST has evolved and refined this methodology based on a number of successful projects, customer and consultant feedback and industry best practices. A structured approach with well-defined phases and measurable performance milestones is the corner stone of the EDM methodology.

This is AST's proprietary methodology, evolved over several years of consulting experience and after considering other largely used methodologies like AIM, EMM, R2I and others. User communities from earlier upgrades have accepted this methodology widely. Our consultants are also well versed in PMI standards and AIM methodology.

To implement a solution that is best suited to the Williamson County's specific requirements, AST analysts will work closely with key users and project team members to tailor the EDM deliverables and project plan and comply with the County's preferred ANSI/PMI templates and deliverables. A brief overview of the EDM methodology is enclosed below.

Enterprise Domain Model (EDM)

AST's Enterprise Domain Model (EDM) is a thorough approach to driving software implementation projects to on-time delivery. EDM is a proven methodology that has evolved from a history of successful implementation experiences and encompasses full implementation life cycle and is particularly suited for large, mission critical software applications in the ERP, CRM and e-Business Applications.

APPROACH

A structured approach is the key element of the EDM methodology. EDM comprises a structured six-phase approach with measurable performance milestones. The deliverables and milestones may be tailored for specific project needs or to meet clients' pre-established standards. By using EDM you can expect:

- ✓ Clearly-defined phases
- ✓ Specific deliverables
- ✓ Measurable performance parameters
- ✓ Well-documented process

CONFERENCE ROOM PILOT

We place great emphasis on our prototyping process-the conference room pilot (CRP). The EDM conference room pilot is unique in that we focus on delivering a fully-functional prototype for the project and clearly defining the extent and scope of customizations. An integral part of this deliverable is the thorough documentation of gaps in functionality, all available options for resolution, and cost estimates for implementing resolutions.

THE EDM DIFFERENCE

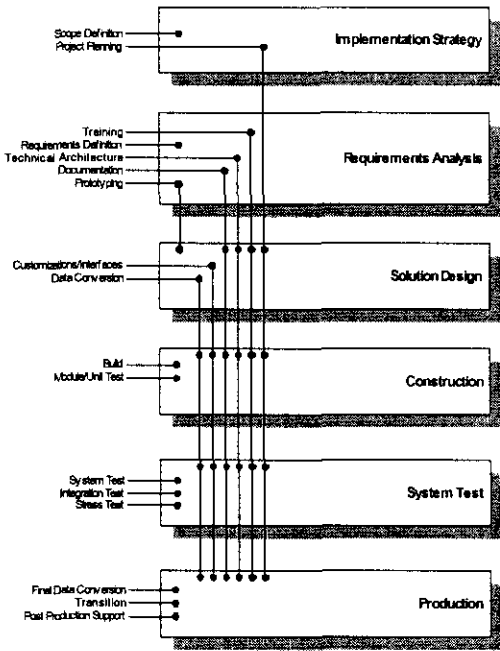
We understand that the active participation of key business users from the outset of the project is the single most important factor in a successful implementation. At the same time, we know that users' time is very valuable and often limited and should be utilized with great care and planning.

To achieve user involvement without dominating user time, EDM divides applications and modules into functional "domains" and assigns one or more key users to each domain. This approach utilizes users' time optimally by involving only key users in decision-making. Constant flow of critical information amongst the domain experts is ensured through consistent documentation and periodic core team meetings.

EDM strongly recommends the use of groupware to track project issues and facilitate communication amongst team members and the use of version control software to track project deliverables.

PHASES & DELIVERABLES

Implementation phases and major deliverables of EDM are shown in the diagram below:



- EDM phases and deliverables can be customized to a particular project need or to complement an existing methodology in use at the client company.
- Solution design considers organizational changes, process improvement and re-engineering initiatives.
- EDM integrates standard and custom modules into a single working business solution.
- EDM verifies the full system solution against company processes, measuring and predicting reliability and performance.
- Documentation and formal acceptance of deliverables and documents is a crucial aspect of EDM methodology.



The project management and execution approach adopted by AST within the above mentioned framework of EDM methodology will establish a platform to analyze the County's specific requirements, and will provide the ability to quickly prototype the HR and Payroll process and system setups specific to the County's requirements, for a definitive final solution. To accomplish these tasks in the most cost effective, timely and methodical manner, our approach emphasizes the creation of a prototype and utilizes the following broad guidelines:

- At the start of the engagement the AST project manager and functional lead will perform a review of the objectives, scope, high-level requirements, risks and contingency plan with the County management and key users
- The DBA will initiate a detailed review of the software, hardware and network infrastructure and database server sizing
- The DBA will validate the compatibility of all software, database, operating system and tools versions for 11i Applications.
- The functional lead will conduct interviews with key users and the County's IT staff to gather detailed information for the options to be implemented in each module, and at the same time educate the users on the best usage of new 11i features to be implemented in the HR and Payroll modules
- Consideration will be paid to impact on the modules (Internet Expense, Advanced Benefits, SSHR) to be implemented in phase II of the project
- Although full-fledged Business Process Re-engineering is not proposed, AST will recommend best practices, where appropriate and innovative use of existing tools and techniques including Oracle Workflow
- AST's team will produce a comprehensive configuration document listing all the setup steps for the modules being implemented as well as any changes to the existing modules required

The deliverables and milestones will be tailored for the County's specific project needs and/or pre-established standards. All issues will be documented and presented with the AST recommended options to the County functional leads and project manager for review and approval. Quick turn-around and decision making on issues is essential for on time completion of projects. AST project manager will work with the County management to establish time frame expectations on decision-making. Any change to these criteria should be approved by the steering committee.

AST understands that the less customizations are applied to a packaged software application the better it is for the customer. The cost of building and integrating customizations are not only immediate but are also carried forward in terms on maintenance and any future upgrade of Oracle Applications. With this in mind, we make every effort to minimize the customizations. Unfortunately there are no automatic tools that will eliminate or reduce the customizations – and that is where the need for a skilled, experienced, innovative and resourceful consulting partner is most felt by the customers.

AST has a successful track record of creating innovative workarounds and procedural solutions to eliminate customizations during all of our implementation projects. We extensively utilize Descriptive Flexfields (DFFs), Workflows and Alerts to provide non-custom solutions to real business problems and functionality gaps in Oracle Applications. These techniques provide customized solutions to specific customer needs and at the same time are fully portable from one release of Oracle Applications to another during upgrades.

**Staffing Plan**

Based on our experience with similar projects, the Scope of Work and County Staffing dedicated to the HRMS implementation project, as outlined in the County’s RFP we are projecting the following resource requirement:

- 1. Project Manager
- 2. HRMS Functional Lead
- 3. Applications DBA

Typically AST also includes a Technical Consultant on its implementation projects if interface, data conversion and customizations (including custom reports) work is expected. Since the County has indicated in the Scope of Services (Exhibit D), that the Kronos interface will be the responsibility of the software vendor and there is no data conversion anticipated we are not anticipating using any technical consultant on this project. If Technical Consultants are needed in addition to the County’s own resources, AST will be happy to provide them on a T&M basis.

For the success of the County’s Oracle HRMS implementation project the cooperation and support of the County’s personnel will be valuable to the AST team working on the project. We do understand that County personnel’s time is limited and that they might have to perform other duties besides the HRMS project. We think that the staffing level indicated in the Scope of Work (Exhibit D) of the RFP is adequate; however, AST will be very careful and deliberate in the demands on the County’s personnel time and make the most effective use of their time.

Based on the preliminary project plan drawn by AST (included in “Implementation Plan” section of this proposal – the following is a detailed staffing level projection by calendar month for both phases of the project. The actual staffing may vary slightly from the projections and will depend on the operational and logistical convenience as worked out between the County and AST project managers, issues faced during the implementation and the availability of the County users.

**PHASE-I**

MONTH	RESOURCE TYPE			TOTAL BY MONTH
	PROJECT MANAGER	FUNCTIONAL LEAD	DBA	
May, 2003	40	60	24	124
June, 2003	32	160	160	352
July, 2003	16	160	160	336
August, 2003	16	160	16	192
September, 2003	16	40	-	56
October, 2003	16	40	-	56
November, 2003	16	40	16	72
December, 2003	16	160	40	216
January, 2004	40	80	40	160
TOTAL BY TYPE:	358	1,040	586	1,984

PHASE-II

MONTH	RESOURCE TYPE			TOTAL BY MONTH
	PROJECT MANAGER	FUNCTIONAL LEAD	DBA	
February, 2004	40	160	80	280
March, 2004	40	160	160	360
April, 2004	40	160	80	280
May, 2004	40	160	40	240
June, 2004	40	160	160	360
TOTAL BY TYPE:	558	1,840	1,106	1,520

Resumes

For an on-time and successful delivery of the project, it is critical to have experienced resources available to assist with the entire process. AST has designated the consultants who are very familiar with Oracle Public Sector HRMS Applications in Release 11i and have gone through several similar implementations in the City and County Government environment. The following AST personnel are being proposed by AST Corporation for the County's Oracle 11i Enhancement Services:

- 1. Gogi Reddy (Project Manager)
- 2. Gene Jannece (Functional Lead)
- 3. Ramu Kallepalli (Applications DBA)

Each of the proposed AST personnel for Williamson County's project has at least 5 years of Oracle Applications experience and has worked on at least two Oracle Public Sector 11i projects. They have 8i Database and 11i Applications experience in Windows/2000 server environment as required by the County. Most importantly, they do not bring this expertise from their prior employment with other consulting companies but have worked on these public sector engagements as employees of AST, and therefore would be able to hit the ground running as a cohesive team.

It will be evident from the qualifications summary table below and the detailed resumes of the proposed consultants, AST consultants are some of the best in the industry as far as the expertise in Release 11i Oracle Public Sector Applications and solving complex business needs by custom software solutions is concerned.

Consultants' Experience Overview

Consultant Name & Role	Key Customers & Projects	Summary of Experience (Detailed Resume enclosed following this overview table)
Gogi Reddy Project Manager	Greater Orlando Aviation Authority State of California (AOC) City of Oakland, CA City of San Marcos, TX Oracle Corporation US Dept. of Transportation Motorola	Mr. Reddy has over six years of experience with Oracle Public Sector Applications and has managed numerous implementation, upgrade and customization projects. Prior to joining AST in 2001, he was a key member of Oracle Corporation's Government Consulting Practice in the Southwest and was instrumental in several successful Oracle Applications projects for Oracle's Public Sector customers. Mr. Reddy possesses an excellent combination of technical, functional and project management skills. He has extensive customizations development experience as well as cross module knowledge in Financials, Projects, HR, Self-Service Applications and therefore is well suited for the County's project where he can provide guidance to both the technical and functional team members.
Eugene Jannece HR Functional Lead	Oklahoma County City of Salem, OR Donaldson GE-Harris Sargent and Lundy	Mr. Jannece is a senior Oracle HR & Payroll consultant with over 20 years of functional experience in the HR and Payroll arena. For the last 6 years has worked exclusively with Oracle HR & Payroll modules and is well versed with OTL, OTA, Self-Service HR modules. He has expert level knowledge of these modules and is proficient in identifying and resolving product functionality gaps and designing customizations to Oracle Applications. Mr. Jannece's Oracle Public Sector Applications experience includes Oklahoma County, OK and City of Salem, OR.
Ramu Kallepalli Applications DBA	Oklahoma County Waukesha County, WI Oracle Corporation McDonald's Corporation SBC Ameritech Rice University Kraft Foods	Mr. Kallepalli has over 8 years of experience as Oracle DBA and has worked with several County Government customers in installing and upgrading Oracle Applications 11i. He has extensive knowledge of Oracle 8i RDBMS and Applications 11i issues on both Unix and Windows/2000 platform. He is currently working on an 11i upgrade project with Oklahoma County on Windows/2000 platform and will be very well suited for the Williamson County project. Mr. Kallepalli is well versed with the installation and architecture of Oracle 11i HRMS Applications, applying and integrating customizations to Oracle Applications 11i and database tuning. Prior to joining AST he worked for Oracle Corporation in the Applications Performance Architecture group for over four years and has gained tremendous exposure to Oracle 9iAS and 11i architecture.

**GOGI REDDY**  
**Project Manager**

Mr. Reddy is a Project Manager with the AST Corporation. His work has focused on Oracle Applications (Financials, HR, Payroll and Projects) for the last four years. During this time he has led Oracle Applications 11i implementation, upgrade and customization projects at different sites and has gained valuable expertise with all aspects of the projects management and execution. His responsibilities have ranged from leading development work on interfaces and conversions to designing reports and forms to sizing databases. Mr. Reddy has also worked on associated Oracle products like Workflow and Alerts and is familiar with the AIM, EMM, EAM, and EDM Methodologies. Mr. Reddy is conversant with the Oracle Applications Architecture and Oracle Application tables. In addition, he has been involved in building extensions to the Oracle Applications product and has experience with the full development life cycle. Mr. Reddy has also been extensively involved with the functional aspects of an implementation viz. Setup, test scripts, CRP's etc. He is currently managing an Oracle Public Sector Applications 11i upgrade and enhancements for the Greater Orlando Aviation Authority.

**TECHNICAL SKILLS**

- Oracle Applications:** Oracle Applications 10.7/11.03/11i (including Multi Org)  
Modules: General Ledger, Accounts Payable, Accounts Receivable, Purchasing, Projects Accounting, Fixed Assets, Payroll, HR, Application Object Library, Self Service Web Applications, Oracle Alerts
- Methodology:** AIM, EMM, EAM, EDM
- Software Tools:** Developer 2000 Forms 4.5/5.0/6.0/6i, Reports 2.5/ Reports3.0. Designer 2000, Discoverer. SQL/PL/SQL. Oracle Workflow Builder, Enterprise Database Management System (EDMS)
- Databases:** Oracle 7, Oracle 8/8i, Access 2.0 & 97,
- Other Software:** Microsoft Projects, HTML, MS Front Page, Visio, Noetix
- Languages:** C, C++, Java, Visual Basic 4.0 & 5.0.
- Operating Systems:** Windows 95, NT/2000, Unix

**PROJECT DETAILS**

**Greater Orlando Aviation Authority, FL** (Jan 03 – Present)  
Project Manager  
*Oracle Public Sector Applications 11i Upgrade & Customizations*

Mr. Reddy is the project manager for this ongoing effort to upgrade the Oracle Public Sector Applications from 10.7 to 11i and at the same time implement additional modules and customizations, including Oracle Grants. The airport authority has identified several functionality gaps and enhancements to Oracle Applications and when this project is expected to provide extensive custom solution and integrate them to work seamlessly with Oracle Applications 11i. Mr. Reddy's responsibilities include creating and maintaining the project plan, reviewing the deliverables and helping with the design of the custom solution and 11i upgrade, coordinating with the authority's project manager and steering committee on the enhancements and issues faced by the project team, reporting project status on a regular basis and assuring the quality of

deliverables. He is a hands-on project manager and provides both functional and technical guidance and problem solving and debugging expertise to the team.

**State of California, Administrative Office of the Courts (AOC)** (Jul 02 – Jan 03)  
Project Manager  
*Oracle Applications Upgrade (Release 10.7SC to 11i)*

Mr. Reddy led a team of 6 AST Consultants in upgrading AOC’s Oracle Financials system from 10.7 SC to Release 11i and enhancing and integrating major customizations to the 11i system. In addition Mr. Reddy also led the AOC in redesigning their Chart of Accounts and provided functional and technical assistance to the AST team members in the related analysis, design and data conversion. Mr. Reddy directed a team of Technical and Functional consultants in evaluating the existing architecture and functionality to be incorporated in Release 11i and training the users in the user of new functionality and customizations. It was one of Mr. Reddy’s responsibilities to map user requirements to Release 11i functionality and identify and estimate the requirements that will have to be satisfied by custom extensions. He has reviewed the sizing and infrastructure requirements with the AST and client DBAs and provided recommendations on the future architecture for deriving maximum benefits from Release 11i. Mr. Reddy is also responsible for creating and managing the project plan and ensuring the adherence to the project timeline and budget. He guided the technical and functional team in converting the 10.7 customizations to Release 11i.

**City of Omaha/Douglas County, NE** (Jun 02 – Jul 02)  
Project Manager & Functional Lead  
*Oracle Public Sector Applications 11i Assessment*

Mr. Reddy was assigned to conduct a two-week assessment of the progress of Oracle 11i implementation effort at City of Omaha/Douglas County. The City and County’s joint team wanted a review of the setups and directions that the implementation vendor (Oracle) was taking on this critical project. As part of this engagement Mr. Reddy produced a project assessment document suggesting functional and technical corrections required on the project as well as the gap in the existing project plan.

**City of Oakland, CA** (Jan 01 – May02)  
Project Manager  
*Oracle Public Sector Applications 11i (HR, Payroll, Financials, Projects) Upgrade Assessment*

Mr. Reddy led a team of 6 AST consultants for an Oracle Applications (HR, Payroll, Financials & Projects) upgrade assessment project for the City of Oakland, CA. As the consulting project manager he coordinated the requirements analysis with the City resources, ensuring the quality of assessment deliverables including architecture and functional assessment documents. His responsibility also included creating and managing the project plan and ensuring the timely and on-budget completion of the project. Mr. Reddy with his wide array of functional and technical knowledge on several Oracle Applications modules, including HR, Payroll, Financials and Projects also provided the guidance to the other AST team members.

**City of San Marcos, TX** (May 01 – Dec 01)  
Project Manager  
*Oracle Applications Upgrade (Release 10.7SC to 11i)*

Mr. Reddy lead the AST Consulting team in upgrading the City of San Marcos' Oracle Financials system from 10.7 SC to Release 11i. In this role he evaluated the existing architecture and functionality to be incorporated in Release 11i. One of Mr. Reddy's responsibilities was to map user requirements to Release 11i functionality and identify and estimate the requirements that will have to be satisfied by custom extensions. He reviewed the sizing and infrastructure requirements with the AST and client DBAs and provided recommendations on the future architecture for deriving maximum benefits from Release 11i. Mr. Reddy was also responsible for creating and managing the project plan and ensuring the adherence to the project timeline and budget. He provided technical and functional guidance in converting the 10.7 customizations to Release 11i.

**Oracle Corporation, Reston, VA** (Jan 01 – Apr 01)  
Technical Project Lead  
*Oracle Applications Release 11i (11.5.3)*

Mr. Reddy gathered requirements from different agencies of the Department of Transportation (DOT) for the Obligations/De-obligations interface. This interface is a DOT wide requirement and would function as an automated interface to create standard Purchase Orders and create modifications to standard purchase orders. The requirements gathering and analysis process included coordinating requirements between users at respective agencies and the core global implementation team in Oklahoma City. The design process included understanding the core functionality of the Oracle Purchasing module. This involved underlying tables, client-side packages, calls to serve-side code. An important part of core PO functionality is the Oracle Workflow component. A great part of the design process involved studying and testing the standard PO Workflow processes and designing new workflows to accommodate the customizations. Created design and development standards, unit test scripts and system test scripts. Reviewed Pseudo-Code for validations, forms and reports. Ensured Coding methodology followed Oracle Application Object Library standards and User Interface standards. Coordinated unit testing and system testing of each component with Functional Analysts.

**Oracle Corporation, Reston, VA** (Oct 98 to Dec 00)  
Principal Consultant, Conversion and Interface Lead  
*Oracle HR & Financials Release 11.0.3, Department of Transportation - Oklahoma City*

Mr. Reddy created conversion packages for converting data from legacy DAFIS system to Oracle Applications Release 11.0.3. The process included FTP of data, SQL\*LOAD of data into staging tables, creating PL/SQL packages, functions and procedures to move data from staging tables to other staging tables and/or Applications Interface tables. This involved interaction with clients and functional consultants to validate data against setups, unit testing, system testing and integration testing. Used EDMS (Enterprise Data Management system) to create mappings from legacy system to Application tables. He created conversions for the following: General Ledger - Open Balances/Expenditures; Accounts Receivables - Customers/ Open Invoices; Accounts Payable - Suppliers (Vendors)/ Open Invoices/ Advances; Purchasing - Open Purchase Requisitions/ Open Purchase Orders; Project Accounting - Projects / Reimbursable Agreements; Human Resources - Employees.

Mr. Reddy created consulting solutions to extend the Applications capabilities by modifying or creating Application Packages, Forms, Reports, Workflows, and Interfaces. He created new and

modified existing Workflows. Modifications were done to the PO CREATE DOCUMENTS and BUDGET EXTENSION workflows using Workflow Builder. Application Server side packages were modified to make the necessary changes to the Workflows.

Mr. Reddy created the following interfaces to accept data from third party legacy systems and process data through different application modules:

- **GSA INTERFACE** – The Modules that were involved were Payables, Purchasing, and General Ledger. This Interface took data from flat files to create Purchase Orders, create Receipts against POs, create AP Invoices, and Payment was made to treasury. Forms 4.5 and Reports 2.5 were used to create Custom Forms and Reports from the staging tables. This Process also involved the use of Oracle Workflow to create PO's.
- **CREDIT CARD INTERFACE** – The Modules that were involved were Payables and General Ledger. This Interface accepts data from data files, validates credit card transactions against setups, creates AP invoices and payment is made to the appropriate vendor. Established validation and reconciliation procedures using the standard Credit Card Validation Report from Oracle Applications.

Mr. Reddy trained Client technical resources on PL/SQL, EDMS, Workflow, and AOL. Although his primary role was focused on the technical aspects, he was involved with the design and development of the Chart of Accounts, creation of Security and Cross-Validation Rules across Set of Books, and setup of Descriptive and Key Flexfields.

**Aerotek Corporation (Client Motorola), San Antonio, TX**

(Dec 97 – Sep 98)

Oracle HR & Payroll, Release 10.7

*Technical Consultant*

Mr. Reddy's responsibilities included Building custom forms and reports in Oracle HR and Payroll modules. He also had to give an analysis of the existing database, reworking of relationships, table structures and design of a new database based on client requirements. Mr. Reddy also worked on data conversion and created load scripts and executable files to move the extracted data into tables within the Oracle HR and Payroll tables. Performed data validation and corrections for converted data using PL/SQL. He developed User-Interface forms in Forms 4.5 and created custom reports in Reports 2.5. Mr. Reddy developed custom PL/SQL Libraries (Using Functions, Procedures, Sub-Procedures and Cursors) to be shared among different forms. He was involved in Unit Testing and documentation.

**EDUCATION**

MS in Information Systems from St. Mary's University, San Antonio, Texas, 1998.

**ORACLE TRAINING**

Oracle Applications: (Oracle Purchasing, System Administration, Application Object Library), PL/SQL, Oracle 7, Developer 2000-Forms 4.5, Reports 2.5, Forms 6.0/6i, Designer 2000, Oracle Self-Serve Applications, Oracle 8i DBA, 11i Architecture.



**GENE JANNECE**  
**HR/Payroll Functional Lead**

Mr. Jannece is a seasoned Oracle Applications Consultant specializing in Oracle HRMS, Payroll and Benefits modules, full life cycle implementations, upgrades from releases 10.7 to 11i and application development. During his twenty-three years of experience in the IT industry he has worked with public and private sector companies. Mr. Jannece's expertise is in full life cycle implementations, upgrades and problem solving. He is fully conversant with Oracle's AIM methodology and has created gap analysis, requirements analysis, solutions design, setup, test scripts and training documents among other deliverables. Mr. Jannece possesses excellent communication skills and good analytical and logical-thinking capabilities. He is a team leader and has the ability to work independently on a project.

**SKILLS SUMMARY**

- Applications:** Oracle Applications Releases 10.7SC, 10.7NCA, 11i (HRMS, Payroll, Benefits, OTA, OTL)
- Databases:** Oracle, MS Access
- Software Tools:** Visual Basic, Discoverer, Noetix Views
- Other Software:** TesserAct HR, ADP, MS Project, MS Office (Word, Excel), PowerPoint, RIMS, Workscape

**PROJECT DETAILS**

**Oracle 11i Upgrade & Customizations** (Jan 03 – Present)  
Oklahoma County, OK  
*HR/Payroll Functional Lead*

- Reviewed the customer wish list of features and enhancements to 11i Public Sector Applications
- Estimate the time and cost of individual scope of work items and establish priority of enhancements in consultation with business users and project manager including for Self Service HR Applications and Oracle Time and Labor (OTL)
- Provided functional guidance in 11i upgrade by performing pre and post upgrade steps
- Created testing scripts and assisted with the acceptance testing of 11i HRMS modules
- Created training documents and conducted training sessions for Self Service HR features
- Designed custom reports for the payroll module and help the technical consultant in testing and validation of the report

**HRMS Evaluation/Assessment** (Oct 02 – Nov 02)  
Arch Coal, Inc. – St. Louis, MO  
*HR/Payroll Functional Lead*

- Reviewed custom changes for TAMS timecard entry and evaluated the replacement of the custom applications with Internet Time
- Created a list of possible timekeeping systems including Oracle
- Development of specifications for conversion strategy.
- Created Organizational hierarchy
- Designed custom changes for TAMS timecard entry.

**Oracle Public Sector Applications Release 11i Upgrade** (Mar 02 – Aug 02)  
City of Salem - Portland, OR  
*HR/Payroll Functional Lead*

- Upgrade from 10.7 to 11i Public Sector HRMS, Payroll and Benefits.
- Core team training during throughout the project to pass on knowledge.
- Development of specifications for upgrade strategy.
- Identified and Redesigned Custom reports, Ad hoc reporting strategy (Discoverer/Noetix Views)
- Created Test Plan and Strategy for all HRMS modules in 11i

**Oracle Applications Release 11i Implementation** (Jul 01 – Jan 02)  
REM – Minneapolis, MN  
*HR/Payroll Functional Lead*

- Implemented Oracle HRMS, Payroll and Base Benefits on 11.5 release
- Replaced legacy payroll system (FACTS) with Oracle Payroll module
- Wrote, implemented and tested HR setup for a 61 company implementation
- Wrote macrocode in Visual Basic for Excel spreadsheets allowing automated input of setup and employee data.
- Used DataLoader to automate the set up process.
- Development of specifications for conversion strategy.
- Redesigned and implemented HR structures and practices that did not exist previously
- Created Organizational hierarchy, Position hierarchy and direct report relationships
- Setup of the database (all structures; key Flexfields, value sets, lookup codes Quickcodes, positions, jobs, grades, salary administration, hierarchies, Special Information Types.)
- Set up HRMS System Administration and Security.
- Created Test Plan and Strategy
- Core team training during throughout the project to pass on knowledge.
- Designed “Black Box” strategy to interface IVR system to an Oracle multiple assignment database.

**Project Management and Quality Assurance** (Jul 00 – Apr 01)  
Workscape, Inc. – Framingham, MA  
*Project Manager*

- Initiated and implemented Project Management and Quality Assurance methodologies
- Conducted QA Audits and acted as Project Manager for large client engagements.
- Developed and Delivered several IVR and Web based Employee Self Service, Manager Self Service and Annual Benefits Enrollment using object oriented tools on time and on budget.
- Wrote and maintained project plans, assigned tasks, managed technical staff, assisted in testing and problem resolution.

**Oracle HRMS and Payroll** (Mar 98 – Jul 00)  
InTime Systems/ARIS/The Consulting Team - West Palm Beach, FL  
*Functional Consultant*

- Implemented Oracle HRMS and Payroll four successful full life-cycle implementations of Oracle Human Resources.

- Responsible for Process Planning, Requirements Analysis, Business Process Re-Engineering, Application Development, Data Conversion, End-User Training using AIM methodology.
- Set up HRMS System Administration and Security.
- Wrote, implemented and tested HR setup for a 36 country implementation.
- Investigated Oracle 11i, implemented 10.7SC and 11i at different clients.
- Wrote macrocode to load A/P invoices in other currencies to automate the process.
- Project Manager and HR Lead. This successful project included Human Resources, Payroll and Benefits. Replaced a legacy payroll system (Lawson)
- HR structures and practices needed to be designed developed and implemented, as they did not previously exist.
- Setup of the HRMS Application (all structures; key Flexfields, value sets, lookup codes quickcodes, positions, jobs, grades, salary administration, hierarchies)
- Mentoring of HRIS, Benefits and Payroll managers and conducted core team training.
- Identified and Designed Custom reports, implemented ad hoc reporting strategy using Discoverer and Noetix Views
- Created requirements analysis documents, project plans, functional specifications, technical specifications, conversion specifications and training documentation.
- Identified and solved data clean up issues of Legacy systems.
- Wrote macrocode in Visual Basic for Excel spreadsheets allowing automated input of setup and employee data.
- Designed interface to ADP payroll.

**TesserAct HR**

(Jan 93 – Mar 98)

H. R. Sciences, Inc., Buffalo Grove, IL

*Functional Consultant*

- Implemented TesserAct HR, Payroll, Position Control and Benefits at large organizations.
- Clients included Delta Airlines, W.W. Grainger General American Insurance, Prudential Insurance, Dayton Hudson, American Express, Racine Unified School District, and Merck.
- Wrote needs analysis, requirements, functional specifications, technical specifications, conversion specifications and training documentation.
- Designed a payroll balancing system to over come peculiarities of the system
- Provided Project Management services
- Designed interfaces for Direct Deposit, US Savings Bonds, General Ledger, Garnishments, United Way, Credit Unions and Job Costing and many others.
- Managed 7X24 HR/Payroll operation at Carlson Companies

**Human Resource, Payroll and Benefits**

(Jul 90 - Jan 93)

TesserAct Corp - Buffalo Grove, IL

*Account Manager / Trainer*

TesserAct is a major vendor of Human Resource, Payroll and Benefits software for Fortune 100 companies.

- As an Account Manager, responsibilities included implementation, design and analysis, consulting, project plans, client training and client issue resolution.
- Modules supported were Human Resources, Payroll, Advanced Human Resources, Imagine Report Writer (CCA), Position Control, Adaptation and the LAN based Graphical User Interface product (Intuition, Active Client).
- For the last year sole duty was design and performance of stand up training on the above products for technical and end users of all levels.

- Also maintained classroom LAN.
- A major accomplishment was bringing Illinois and Wisconsin clients together to form a local user group (WITIE).

**Maintenance Releases**

(Jun 89 – Aug 90)

Global Software - Chicago, IL

*Consultant*

- Duties included testing and debugging maintenance releases
- Provided phone support for users and technical staff of clients
- Updated training manuals and documentation.
- All environments and teleprocessors were supported.

**Minicomputers and LAN Based Hardware**

(Jan 86 – Jun 89)

Resource Information Management Systems - Naperville, IL

*Client Support Representative*

- Provided site surveys for installation of minicomputers and LAN based hardware.
- Installed software at client sites. Was able to reduce the time needed from eight hours to two hours. Time saved was used to train operators.
- Installed trained and was sole support of General Ledger, Accounts Payable, Billing and Accounts Receivable, Payroll and ad-hoc report writers.
- Provided high level training for end users on a highly complex proprietary benefits package at client sites and in our classrooms. Wrote documentation and training manuals. Created a curriculum for system operators who had little or no experience with computers.
- Provided phone support for hardware, telecommunications, utility programs and file recovery.
- Performed pre-sales support.

**Client Support**

(Sep 81 to Jan 86)

Automatic Data Processing - Chicago, IL

*Senior Account Executive*

- Provided all post sales client support
- Implementation, system conversions, training, phone support and add-on sales for Payroll, General Ledger, Accounts Payable and Accounts Receivable.
- Was responsible for ten of Chicago's 100 largest companies and hundreds of small and medium sized companies.
- In the last year sold \$200,000 of additional lead business.

**EDUCATION**

- Bachelor of Arts, University of Illinois at Chicago
- MS (Industrial Psychology - Human Resources), University of Illinois at Chicago

**RAMU KALLEPALLI**  
**Sr. Applications DBA**

Mr. Kallepalli is a Certified Oracle DBA with over 14 years of systems experience, specializing in Oracle Applications from DBA, infrastructure and architecture. As a senior member of Oracle Corporation's Performance Architecture group for over four years Mr. Kallepalli has been involved with several complex and high-profile Oracle Database and Applications performance tuning, assessment and configuration projects. He has also led teams in installing, upgrading, configuring, tuning and supporting Oracle databases, Internet Applications Servers and ERP and CRM Applications including the latest 11i eBusiness Suite. He has also worked extensively with Manugistics Supply Chain Planning and Optimization (SCPO) Applications. Mr. Kallepalli has extensive experience with PL/SQL and Unix Shell scripts and been involved with the development of interfaces, conversion programs, customizations and database triggers in Oracle Applications environment. He is familiar with Oracle Self Service Web Applications, performance tuning of queries, reports and applications. Mr. Kallepalli is proficient at managing projects and using Methodologies like - EDM, EAM, AIM, EMM and CDM. Mr. Kallepalli's excellent communication and personnel skills coupled with extensive hands on experience and project management skills will be an asset to any Oracle Applications project.

**SKILLS SUMMARY**

- Applications:** Oracle Application 10.7SC/NCA, 11.0.3, 11i including Multi-Language Support (MLS), Multi-node installations, Public Sector Applications, CRM, Manugistics Supply Chain Planning and Optimization (SCPO)
- Software/Tools:** PL/SQL, Oracle Discoverer 3i/4i, 8iAS, 9iAS, Portal 3.0.x, Forms server 6i, Reports server 6i, Oracle Replication managers, Oracle Advanced Queuing 8i, OAS 4.0, WAS 3.0, BMC SQL\*BACKTRACK, HP Omniback, PL.GENERATOR, PL/VISION, Veritas NetBackup, IIS 2.0, Microsoft Transaction Server, MDTC 2.5, Microsoft Office Tools, Microsoft Project 98 & 2000, Unix Shell Scripts
- Databases:** Oracle 6.x/7.x/8.0/8i/9i, Sybase 10.0/11.0, Microsoft SQL server 6.5/7.0
- Query Tools:** SQL/Navigator, Toad, Discoverer 3i/4i
- CASE Tools:** Oracle Designer, ERWIN
- Operating System:** HP UX 9.X/10.X/11, AIX UX 4.2, SUN SOLARIS, HP 9000, IBM RS/6000, Windows NT 3.51/4.0, Windows 2000

**PROJECT DETAILS**

**Oracle Applications 11.5.7 Upgrade** (Jan 03 -- Present)  
Oklahoma County, OK  
*Senior Applications DBA/Project Lead*

As the Applications DBA and Project Lead for upgrade of Oracle Financials and HRMS Applications from 10.7 to 11i on Windows 2000 Server performed the following tasks:

- Review the architecture and sizing needs for Oracle HRMS and Financials 11i.
- Create a detailed project plan and production cutover checklist
- Installation of Oracle Applications 11i Technology Stack

- Administration of various Development and Test instances
- Patch application on Oracle Applications Database
- Performed sizing and tuning of the database
- Applied patches and debugged applications and database related issues

**Oracle Applications 11.5.3 to 11.5.7 Upgrade**

(Sep 02 – Nov 02)

Waukesha County, WI

*Senior Applications DBA*

Technical and DBA lead for upgrade of Oracle Applications from 11.5.3 to 11.5.7. Upgrading database, Applications, web servers and tools for Waukesha County. Applying relevant patches and assisting clients in issue resolution, application and database cloning. Training technical personnel in the patch application and upgrade process.

**Oracle Applications 11i Debugging & Performance Tuning**

(July 02 – Aug 02)

City of San Marcos, TX

*Senior Applications DBA*

Performed Infrastructure and Database assessment for the City of San Marcos in the processing of resolving ADI and performance issues on Windows/2000 Server and 11.5.5 Environment. Assisted client DBAs in troubleshooting Oracle Applications 11i issues and TAR resolution.

**Oracle Corporation**

(Mar 98 – June 02)

*Senior Applications DBA/Technical Manager*

As a Senior Applications DBA and Technical Manager for Oracle Corporation was responsible for project execution from technical and DBA perspective for several large and complex Oracle Applications projects for Release 11i, 11.0.3 and 10.7. Some of the important client engagements included the following:

**McDonald's Corporation - Oracle Applications 11.0.3 and 11i**

- Led infrastructure team of Apps DBAs and Unix System administrators in 11.0.x, 11i2, 11i4, Sun Solaris 2.5/2.6/2.8 environments and ENG, BOM and INV modules.
- Managed multiple Oracle Applications upgrade projects - from 11.0.2 to 11.5.2 and from 11.5.2 to 11.5.4.
- Involved in analyzing DBA staffing needs, hiring and training new DBAs. Upgraded database from 8 to 8i and 8i to 9i.
- Lead for Supply Chain Planning and Optimization (SCPO) software versions 5.x/6.0/6.1x. Involved in installation, configuration, support, tuning and cloning Manugistics applications in Sun Solaris environment.
- Troubleshooting Manugistics server processes and performance issues related to multiple applications and interfaces in 11.0.3 and 11i environments.
- Involved with the design of a Data Warehouse application including ETL routines
- Technical lead for the extract of GL transactional data and the purge APIs.
- Training DBAs in Applications architecture, installation and configuration, writing batch programs to run SCPO, assessing performance tuning of database and Applications.

**Kraft Foods - Oracle Applications 10.7 SC to 11i Upgrade & Custom Modules**

- Managed 6 million dollar project Financials and Manufacturing Applications upgrade project, from kick-off to production and postproduction for the Maxwell House Coffee division of the Kraft Foods.
- Completed the project on time and within budget with highest quality and performance. Project involved design and implementation of Oracle System with interfaces to Rockwell Software, Prism Data Interchange (PDI), Order Tracker and Corporate MES Repository.
- Was involved in database and server sizing, software installation and upgrade, web and application server installation and configuration, resolving issues, monitoring actual work and quality, interacting with business units and other systems managers, updating project status, making presentations on project, and budget tracking
- Managed a team of 15 consultants from multiple vendors
- Created archiving and purging strategy and tuned the DSS database
- Designed data warehouse application including database layout strategy and capacity planning and project plan.

**Britannica.com - Oracle eCommerce Application**

Project Manager for Building Portal providing news, stock quotations, weather and value added content using Oracle and Java technology. Involved in integration-implementation and Post-project support. Involved in leading activities such as cloning databases, recommend architecture, loading Java stored procedures, configuration of JVM, snapshot replications and tuning net8 listeners and MTS servers.

**McDonald's - Oracle Portal Application**

Sun Enterprise 10000, Restaurant, 9iAS, Discoverer 3i/4i, Oracle Portal 3.0.9, Web Application Server (WAS 4.0), Oracle Application Server (OAS 3.0): Managed and implemented integration of Oracle 9iAS including portal with Oracle applications. Managed architecture and implementation of splitting 9iAS from database and concurrent manager server with load balancing using Oracle Webcache.

**Rice University - Oracle Government Financials 10.7 Implementation**

Installed and configured Oracle Government Financials 10.7 on Sun Solaris 2.5 server. Installed and Configured Network Manager and Enterprise Manager 1.5 on Windows NT. Created procedures to copy database and applications environment from production to test and development environments.

**Cargil, Minneapolis - Custom Manufacturing Applications**

Designed and implemented the transition of the Manufacturing Applications of this large publishing company from Sybase to Oracle. Automated the entire oracle database creation and replication process across multiple machines all over the world. Planned and executed upgrade client's production databases from Oracle 7.0 to 7.3.4 and moved databases to new servers with minimal down time.

**Greenbrier and Russell, Inc**

(Mar 97 – Mar 98)

*Principal Consultant (DBA & Architect)*

As a Principal Consultant for Greenbrier and Russell Mr. Kallepalli was involved in various client engagements. Some of the important projects were as follows:

**HK Systems, Milwaukee - Manufacturing Applications**

Manufacturing application software vendor, Oracle 7.3.2.2, Sybase System 11, PL/Vision 97.1, SQL\*Net v2, PL/SQL 2.3, HP-UX, WIN NT 4.0, CVS 1.8.1, OEM 1.2.2, SQL\*Net v2: Managed development of integrated warehouse management system (WMS). Project involved coding PL/SQL packages, stored procedures and triggers, porting business logic from Sybase System 11 to Oracle 7.3.

**Allstate Insurance Company - Custom Data Warehouse Application**

Was the lead Data Warehouse Architect for designing, developing and implementing an insurance data warehouse application using Oracle RDBMS 7.3 on IBM AIX platform. In addition to Oracle database the source systems included Windows NT, IBM/RS 6000, Compaq Proliant 5000 boxes and MS SQL Server 6.5 and SYBASE 11 databases. Used ERWIN to design the database and configured Infopump 3.0 tool to move data among various data warehouse servers. Installed RDBMS and Infopump software. Documented and created full life-cycle maintenance procedures including archiving, purging and disaster recovery for the system.

**Compuware Corporation**

(Jan 96 – Mar 97)

*Senior Technical Analyst*

Performed DBA functions in IBM RS/6000, AIX Unix environment. Developed Paging Business Management System (PBMS) using FORMS 2.3, FORMS 3.0, FORMS 4.5, PL/SQL 2.0, C, SQL and Oracle 7. Developed a data transfer application from MVP (Module Voice Processor) to PBMS using C, Pro\*C and Unix cron jobs.

**Battelle PNL**

(May 95 – Dec 95)

*Database Administration*

Performed full range of DBA activities for this National Lab on Sun Solaris and Oracle 7.0 platform.

**Indian Railways**

(May 88 – Jul 93)

*Custom Applications*

*Programmer/Analyst*

Part of the development team for responsible for internal custom systems implementations. Designed and developed several custom modules using Oracle RDBMS 6.0, Forms 3.0 and Reports 1.5, SQL\*Plus, SQL\*Loader and Unix Shell Scripts.

**EDUCATION**

MS Engineering, Montana State University – Bozeman, MT



Implementation Plan

A thorough and careful planning, combined with a structured methodology is the key to the success of a packaged software implementation project. AST therefore emphasizes detailed planning at all stages of the Oracle HRMS implementation project and to this end we have prepared a very thorough project plan for all items identified in the scope of work. This plan is based on the methodology and approach, recommend by AST and utilizes our institutional knowledge base of several similar projects completed successfully in the past.

For the purpose of discussion the start date of this preliminary project plan for Phase I is assumed to be the mid May 2003. For phase II the start date is assumed to be Feb 1, 2004. After the project commencement, AST project manager will be update this plan in consultation with the County's project team to reflect their priorities, resource availability and level of details desired in the project plan.

The following detailed project plan illustrates the framework of our approach, strategy and planning process in a much greater detail. The purpose of this detailed plan is to illustrate the discrete steps; tasks and sub-tasks planned and executed by AST on Oracle HRMS Applications implementation projects of similar scope. This plan may be used as the starting point for the full and formal project plan upon project initiation.

ID	Task Name	Duration	Start	Finish	Ma
1	<b>WILLIAMSON COUNTY HRMS IMPEMETATION</b>	<b>289 days</b>	<b>5/15/03</b>	<b>6/22/04</b>	
2	<b>PHASE- I (HR and Payroll)</b>	<b>175 days</b>	<b>5/15/03</b>	<b>1/14/04</b>	
3	<b>Strategy</b>	<b>10 days</b>	<b>5/15/03</b>	<b>5/28/03</b>	
4	Create Implementation Strategy	4 days	5/15/03	5/20/03	
5	Review & Approve Strategy	2 days	5/21/03	5/22/03	
6	Create Implementation Plan	4 days	5/21/03	5/26/03	
7	Review & Approve Plan	2 days	5/27/03	5/28/03	
8	<b>Analysis</b>	<b>48 days</b>	<b>5/29/03</b>	<b>8/4/03</b>	
9	Analyze HR Requirements	30 days	5/29/03	7/9/03	
10	Analyze Payroll Requirements	30 days	6/5/03	7/16/03	
11	Analyze Interface & Conversion Needs	5 days	7/17/03	7/23/03	
12	Create Integrator & Transition Plan	2 days	7/24/03	7/25/03	
13	Create Gap Analysis Document	5 days	7/28/03	8/1/03	
14	Evaluate System & Sizing Needs	2 days	6/2/03	6/3/03	
15	Create Design & Build Standards	3 days	6/2/03	6/4/03	
16	Update Work Plan	2 days	8/1/03	8/4/03	
17	<b>Design</b>	<b>29 days</b>	<b>8/1/03</b>	<b>9/10/03</b>	
18	Create HR Setup Document	8 days	8/1/03	8/12/03	
19	Create Payroll Ser-up Document	8 days	8/1/03	8/12/03	
20	Design Customizations & Interfaces	10 days	8/15/03	8/28/03	
21	Conduct Design Walkthrough	3 days	8/28/03	9/1/03	
22	Approve Design Document	5 days	8/28/03	9/3/03	
23	Create Development & Test Environments	10 days	8/1/03	8/14/03	
24	Create Implementation Checklist	10 days	8/28/03	9/10/03	
25	Create Test Scripts	10 days	8/28/03	9/10/03	
26	<b>Construction</b>	<b>31 days</b>	<b>9/1/03</b>	<b>10/13/03</b>	
27	Build Custom Program Unit	30 days	9/1/03	10/10/03	
28	Build Data Conversion Programs	15 days	9/1/03	9/19/03	
29	Create Registration Scripts/Documents	4 days	9/1/03	9/4/03	
30	Create User Manuals	5 days	9/1/03	9/5/03	
31	Update Test Scripts	5 days	9/1/03	9/5/03	
32	Update Design/Setup Documents	3 days	9/1/03	9/3/03	

ID	Task Name	Duration	Start	Finish	Mz
33	Conduct Unit Test	10 days	9/10/03	9/23/03	
34	Setup & Create CRP (Prototype)	10 days	9/23/03	10/6/03	
35	Conduct Initial Acceptance Test	5 days	10/7/03	10/13/03	
36	<b>Test &amp; Training</b>	<b>141 days</b>	<b>5/15/03</b>	<b>11/27/03</b>	
37	Create Test Environment	5 days	5/15/03	5/21/03	
38	Create Training Environment	5 days	8/19/03	8/25/03	
39	Validate/Test CRP (Prototype)	10 days	5/15/03	5/28/03	
40	Conduct Integration Test	5 days	10/6/03	10/10/03	
41	Conduct System Acceptance Test	5 days	10/9/03	10/15/03	
42	Create Training Plan	2 days	10/15/03	10/16/03	
43	Conduct User Training	15 days	11/3/03	11/21/03	
44	Technical Turnover & Knowledge Transfer	2 days	11/24/03	11/25/03	
45	Finalize Detailed Implementation Checklist	2 days	11/26/03	11/27/03	
46	<b>Production</b>	<b>34 days</b>	<b>11/17/03</b>	<b>1/1/04</b>	
47	Upgrade Server and Hardware	10 days	11/17/03	11/28/03	
48	Shutdown & Backup Production System	1 day	12/25/03	12/25/03	
49	Perform Setup of New Modules	1 day	12/26/03	12/26/03	
50	Register Custom Modules	1 day	12/29/03	12/29/03	
51	Convert Data	1 day	12/29/03	12/29/03	
52	Conduct Final Acceptance Testing	1 day	12/30/03	12/30/03	
53	Enable Production System/Logins	1 day	1/1/04	1/1/04	
54	Post Production Support	10 days	1/1/04	1/14/04	
55	<b>PHASE- II (Internet Expense, OAB, SSHR)</b>	<b>102 days</b>	<b>2/2/04</b>	<b>6/22/04</b>	
56	<b>Strategy</b>	<b>6 days</b>	<b>2/2/04</b>	<b>2/9/04</b>	
57	Create Implementation Strategy	2 days	2/2/04	2/3/04	
58	Review & Approve Strategy	1 day	2/4/04	2/4/04	
59	Create Implementation Plan	2 days	2/5/04	2/6/04	
60	Review & Approve Plan	1 day	2/9/04	2/9/04	
61	<b>Analysis</b>	<b>26 days</b>	<b>2/10/04</b>	<b>3/16/04</b>	
62	Analyze Internet Expense Requirements	20 days	2/10/04	3/8/04	
63	Analyze OAB Requirements	20 days	2/10/04	3/8/04	
64	Analyze SSHR Requirements	20 days	2/10/04	3/8/04	
65	Analyze Interface & Conversion Needs	2 days	3/8/04	3/9/04	
66	Create Integration & Transition Plan	2 days	3/8/04	3/9/04	
67	Create Gap Analysis Document	4 days	3/10/04	3/15/04	
68	Evaluate System & Sizing Needs	1 day	2/10/04	2/10/04	
69	Create Design & Build Standards	1 day	2/10/04	2/10/04	
70	Update Work Plan	2 days	3/15/04	3/16/04	
71	<b>Design</b>	<b>15 days</b>	<b>3/15/04</b>	<b>4/2/04</b>	
72	Create Internet Expense Setup Document	5 days	3/15/04	3/19/04	
73	Create OAB Setup Document	5 days	3/15/04	3/19/04	
74	Create SSHR Setup Document	5 days	3/15/04	3/19/04	
75	Design Customizations & Interfaces	5 days	3/17/04	3/23/04	
76	Conduct Design Walkthrough	3 days	3/24/04	3/26/04	
77	Approve Design Document	3 days	3/29/04	3/31/04	
78	Create Development & Test Environments	10 days	3/17/04	3/30/04	
79	Create Implementation Checklist	8 days	3/24/04	4/2/04	
80	Create Test Scripts	8 days	3/24/04	4/2/04	
81	<b>Construction</b>	<b>21 days</b>	<b>4/5/04</b>	<b>5/3/04</b>	
82	Build Custom Program Unit	20 days	4/5/04	4/30/04	
83	Build Data Conversion Programs	10 days	4/5/04	4/16/04	
84	Create Registration Scripts/Documents	3 days	4/5/04	4/7/04	
85	Create User Manuals	6 days	4/5/04	4/12/04	
86	Update Test Scripts	3 days	4/13/04	4/15/04	
87	Update Design/Setup Documents	3 days	4/13/04	4/15/04	
88	Conduct Unit Test	9 days	4/16/04	4/28/04	
89	Setup & Create CRP (Prototype)	9 days	4/16/04	4/28/04	
90	Conduct Initial Acceptance Test	3 days	4/29/04	5/3/04	
91	<b>Test &amp; Training</b>	<b>34 days</b>	<b>4/15/04</b>	<b>6/1/04</b>	
92	Create Test Environment	4 days	4/15/04	4/20/04	
93	Create Training Environment	4 days	4/15/04	4/20/04	

ID	Task Name	Duration	Start	Finish	Ap
94	Validate/Test CRP (Prototype)	6 days	4/29/04	5/6/04	
95	Conduct Integration Test	3 days	5/7/04	5/11/04	
96	Conduct System Acceptance Test	3 days	5/12/04	5/14/04	
97	Create Training Plan	2 days	5/3/04	5/4/04	
98	Conduct User Training	12 days	5/17/04	6/1/04	
99	Technical Turnover & Knowledge Transfer	2 days	5/17/04	5/18/04	
100	Finalize Detailed Implementation Checklist	2 days	5/20/04	5/21/04	
101	Production	13 days	5/24/04	6/9/04	
102	Upgrade Server and Hardware	2 days	5/24/04	5/25/04	
103	Shutdown & Backup Production System	1 day	6/7/04	6/7/04	
104	Perform Setup of New Modules	1 day	6/7/04	6/7/04	
105	Register Custom Modules	1 day	6/7/04	6/7/04	
106	Convert Data	1 day	6/7/04	6/7/04	
107	Conduct Final Acceptance Testing	1 day	6/8/04	6/8/04	
108	Enable Production System/Logins	1 day	6/9/04	6/9/04	
109	Post Production Support - Phase II	10 days	6/9/04	6/22/04	

Training Plan

We strongly believe that the training is an important component of the Oracle HRMS Applications implementation effort and the success of the overall project rests on a well-trained staff that effectively uses the technology to complete their tasks more efficiently. AST Corporation will conduct thorough and effective training for all modules implemented in Phase I and II of the project using the actual County related data and business procedures. AST will employ the interactive training solutions approach and design a customized curriculum to prepare the users in the use and maintenance of the 11i HRMS Applications.

Training delivery will be instructor-led, including lecture, presentation material, and exercise work for each session. Designated County staff will attend training sessions and perform hands-on exercises based on selected job tasks, or procedures. For technical personnel one-on-one informal training will be provided to prepare them for the maintenance of the system after the go-live date.

Training Deliverables

Training will be provided in both hard copy and an electronic master copy for deploying on the intranet or the network drive. The following deliverables will be used for the training tasks.

- **Functional Overview:** The functional overview will describe the task's purpose and job responsibility. It contains a high level overview of the business process and policy information, where appropriate.
- **User Procedure Manual:** The step-by-step procedures will indicate menu choices, number each step in the procedure, and describe the action required to complete the steps involved in a particular business function and/or use of customization/report.
- **Hints & Warning:** The hints will describe alternatives to completing the task or potential common mistakes encountered when performing the task.
- **Data Set Handouts:** Participants will receive the necessary data to be used in the training exercises.
- **Job Aids:** Participants will be provided job aids (shortcuts, hotkeys etc) related to the business function or task at hand on which they are training.

Since the level of complexity and extent of application use will vary greatly for different groups of users, not all training deliverables will be applicable to each training session and user.

**Training Database Strategy**

A key factor in successful end-user training is the creation of a training database that is specific to the procedure followed at the Williamson County and contains real-life examples. This is what differentiates customized training offered by AST from a standardized "education" classes offered by some vendors. The training database contains requisite master data and business transactions that will allow students to complete course exercises. A well-designed training database includes:

- Realistic data that class participants can understand and relate to
- Predictable results that allow instructor-led classes or self-paced training to run smoothly
- Evaluates student performance
- Practice Exercises that will be completed by the attendees during the training

As part of the training solution for the County, we recommend the creation of a training environment that is separate from the other environments of Oracle Applications 11i. A separate environment permits better control of training data and training results. AST consultants will help the County personnel in creating and maintaining the training database.

**Knowledge Transfer**

In addition to the formal user training, AST methodology establishes a knowledge transfer process that is continuous and starts from the planning of the project through prototyping, testing, production upgrade, and ends with post-production support; rather than an event that happens at the end of the implementation project. To successfully transfer knowledge of the new modules implemented, AST teams up with client personnel to form one single team. Both functional and technical tasks are reviewed together through each phase of the project. AST's DBA will work closely with the County's technical staff to demonstrate, document, and educate them on the requirements of the module installation, sizing and database configuration steps. AST's functional consultants provide training to the key functional County team members on the new modules and features implemented. In addition, AST provides Post Production support to ensure a smooth transition to the County's users in a manner, which provides a "safety net" (AST being onsite). This process solidifies the knowledge of working with the customizations and new modules implemented in the 11i and the related development tools.

**Deliverables Required of the County**

The key deliverables and targeted accomplishments on the project have been identified in the detailed project plan shown in the "Implementation Plan" section above. However AST would require significant support from the County personnel and user community to accomplish the objectives set forth by the County.

The key deliverables and assistance required of the County can be summarized as follows:

- Providing work place and desk top computers with access to the County's Oracle Applications environment
- Access to the existing Oracle Financials and Grants modules and any existing documentation
- Access to the users and management for questions and decisions
- Quick decision on project related issues as and when raised by the project team
- Availability of users for testing, training and other project activities
- Availability of system resources for creation of development, test and training environments

***Scope of Work***

For the purpose of planning and cost estimate AST has relied on the Scope of Services (Exhibit D) of the RFP issued by the County. It is assumed that the Oracle HRMS Applications will be implemented without customizations ("Vanilla") and no data conversion will be performed. Custom reports if required will be developed by County resources.

**AGENDA ITEM 34**

Discuss and take appropriate action on hiring a part time person for records management purposes for District Clerks office to be paid out of countywide Records Management Funds. (Approximately \$3,800.00)

Moved: **Commissioner Boatright**

Seconded: **Judge Doerfler**

Motion: To approve the hiring of a part time person for records management purposes for District Clerks office to be paid out of countywide Records Management Funds. (Approximately \$3,800.00)

Vote: 4 – 0. **Commissioner Hays was absent from the dais.**

**AGENDA ITEM 35**

Consider revisions to county personnel Policy Manual.

Moved: **Commissioner Hays**

Seconded: **Commissioner Boatright**

Motion: To approve the revisions to the county personnel Policy Manual.

Vote: 5 - 0

<Attachment>