

**EXHIBIT A**  
**RFQ # 14-03 PeopleSoft Upgrade Consulting Services**  
**Statement of Work**

**SECTION I - Overview**

**A. PROJECT BACKGROUND**

The Clerk & Comptroller, Palm Beach County (Clerk) office is looking to complete a technical upgrade of our PeopleSoft Application Suite from version 9.0 to version 9.2.

The selected vendor is to provide technical leadership, offer Best Practices, and complete knowledge transfer to ensure Clerk IT is positioned for long-term sustainability of the Application Suite. In addition, the vendor should have a working practice that is both efficient and effective in the completion of PeopleSoft product upgrades from version 9.0 to version 9.2.

**B. Migration Plan**

PeopleSoft Version	Sept 2014	Upgrade Version
Portal	9.1R2	Patches, as appropriate
FMS	9.0	9.2
HCM	9.0	9.2
PeopleTools	8.53	Patches, as appropriate, with possible 8.54

**Section II - Current Usage**

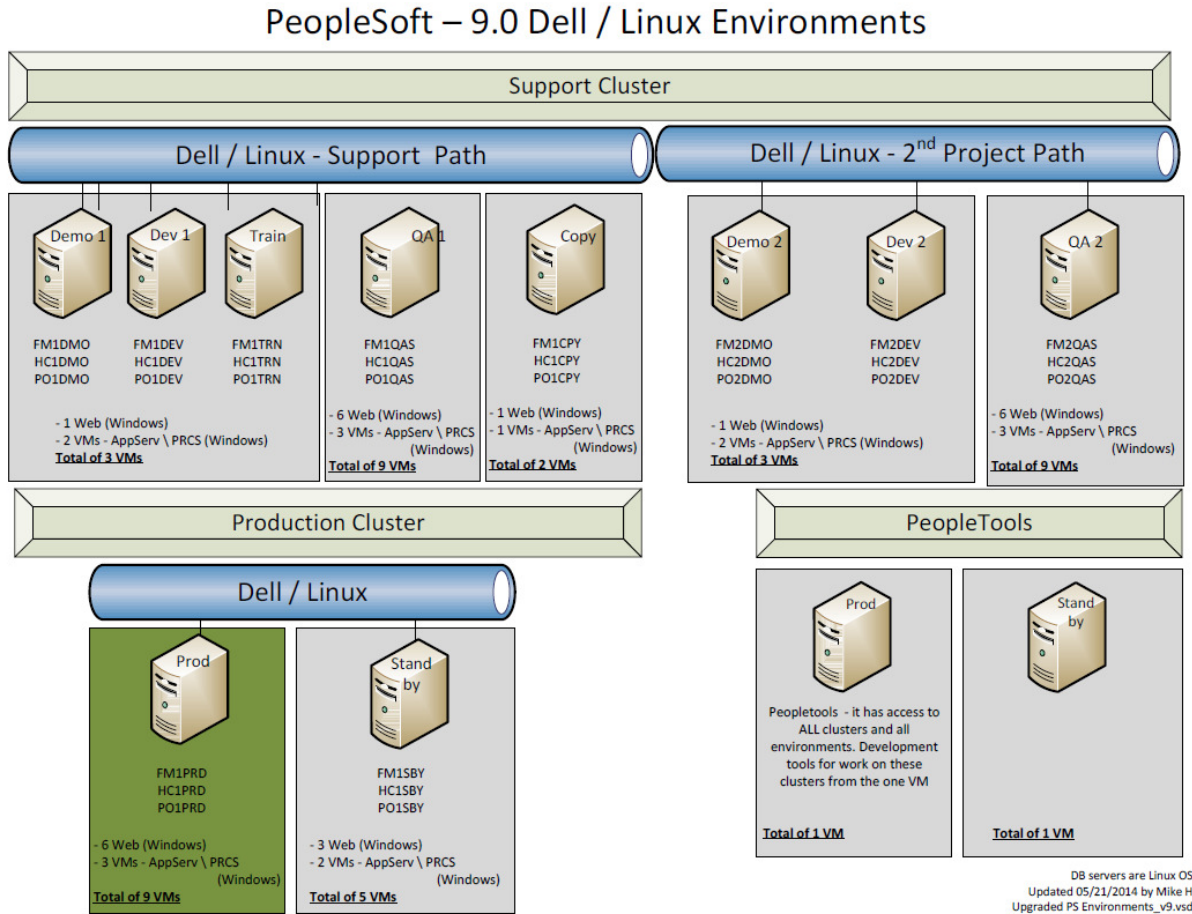
**A. PeopleSoft Platform**

The hardware/infrastructure includes Oracle 11g database configured with RAC high-availability on the RedHat Enterprise Linux operating system, specifically Oracle Linux, installed on Dell hardware. PeopleSoft web, application and batch servers run Windows 2008 R2 on Dell hardware. Details of our current implementations are below

Users	
Payroll	8,000
Benefits	6,000
FMS	750
Database size	HCM 300 GB FMS 150 GB Portal 20 GB
Growth expectations	10% per year for each dB
Customizations	42
Interfaces	105
Reports	23
Web Services	18

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**B. PeopleSoft Current Layout**



**C. PeopleSoft Modules Installed & In-Use**

- PeopleSoft HCM 9.0
  - Human Resources
  - Benefits Administration
  - Payroll for North America
  - Absence Management
  - Commitment Accounting (Clerk) & Non Commitment Accounting (County)
  - eProfile
  - eCompensation
  - eBenefits
  - ePerformance
  - Workforce Planning
- PeopleSoft Financials 9.0
  - General Ledger
  - Commitment Control
  - Purchasing
  - eProcurement
  - Payables
  - Expenses
  - Cash Management

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- Receivables
- PeopleSoft Portal
  - Enterprise Portal
  - HRMS Portal Pack
  - Financials Portal Pack
  - Supply Chain Portal Pack

**D. PeopleSoft Modules Owned but Not Installed or Not In-Use**

- UPK PeopleSoft
- Enterprise Learning Management
- PeopleSoft HCM 9.0
  - TAM/CG - Talent Acquisition Manager / Candidate Gateway
  - Time & Labor
  - Pension Administration
  - eDevelopment
  - WorkForce Rewards
- PeopleSoft FMS 9.0
  - Planning Budgeting
  - Asset Management
  - Deal Management
  - Project Costing
  - Enterprise Contract
  - Enterprise Grant
  - Program Management
  - Billing
  - eSupplier
  - Strategic Sourcing
  - Supplier Contract Management
- HCM Warehouse
- Financials Warehouse
- EPM Portal Pack

## **SECTION III – SCOPE OF SERVICES**

### **A. *Services Required***

#### **1 - Project Management**

- Provide Project Management throughout the project in accordance with the Clerk's standard contractual terms and conditions, as well as the Project Management standards layout out in Exhibit B located on this Project's web site.
- Project Management to be handled both on-site and off-site

#### **2 - Complete the technical product upgrade of the PeopleSoft environments from version 9.0 to version 9.2**

- This is an on-site engagement
- **Customizations, Extensions, Modifications, Localizations, and Integration (CEMLI) Analysis**

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- Customization review and rationalization
  - Document the recommendations for reducing the number of customizations by utilizing the standard PeopleSoft workflows, where possible. Document clearly any customizations Clerk wish to retain where there is a standard available within PeopleSoft 9.2
  - Provide information, recommendations and/or knowledge transfer about new features available in 9.2 that would add potential value to Clerk functional and technical business processes, such as reporting tools, mobile integration etc.
- **Technical assessment of PeopleSoft Environments / Health Check**
- Review current PeopleSoft environments, both Production and Support, and provide recommendations for each tier (Application, Database and Web) including best practices, performance, load testing, tuning, monitoring, etc.
- **Perform the upgrade from 9.0 to 9.2**
- Upgrade Human Capital Management (HCM) and Finance Management System (FMS) application pillars
  - Installation of required new features such as the Secure Enterprise Search (SES), Analytics, etc.
  - Utilize best practices, the new PeopleSoft Upgrade Manager (PUM), and provide hands-on, cross training to the Clerk PeopleSoft IT staff.
  - The upgrade to 9.2 to be completed in the support, QA support, and Production environments.
- **Cut-over performance optimization to ensure smooth and timely “Go-live”**
- Perform analysis and provide recommendations of how to ensure smooth and timely cut-over to production during the “Go-live” process.
- **“Go live” support**
- Go live is planned for the three day weekend of Memorial Day weekend May 2015 (Fri 22<sup>nd</sup>).
  - Perform the 9.2 upgrade in the Production environment
- **Post “Go live” support**
- Provide appropriate support for Clerk that is considered necessary in a post Go-live state, for two complete pay cycles, a minimum of 4 weeks.

**B. Milestones**

- **Customizations, Extensions, Modifications, Localizations, and Integration (CEMLI) Analysis**
- ◆ Complete the CEMLI analysis
  - ◆ Deliver the CEMLI analysis documentation
  - ◆ Present the CEMLI results and recommendations in a workshop discussion for review by the Clerk IT
- **Technical assessment of PeopleSoft Environments / Health Check**
- ◆ Complete the Environment Health Check
  - ◆ Provide recommendations as specified
  - ◆ Provide detailed Technical assessment documentation
- **Perform the upgrade from 9.0 to 9.2**

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- ◆ Complete the upgrade of the Human Capital Management (HCM) pillar
  - ◆ Complete the upgrade of the Finance Management System (FMS) pillar
  - ◆ Install the required new features, as agreed with Clerk IT staff
  - ◆ Complete Hands-on cross training to the Clerk PeopleSoft IT staff
  - ◆ Complete the upgrade within the QA environment, ready for FitGap and UAT
  - ◆ Provide detailed upgrade documentation
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- **Cut-over performance optimization to ensure smooth and timely “Go-live”**
    - ◆ Complete the “Cut-Over” Analysis
    - ◆ Provide recommendations
    - ◆ Provide detailed Cut-over documentation
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- **“Go live” support**
    - ◆ Perform the 9.2 upgrade in the Production environment
    - ◆ Provide local Vendor support during the go live three day weekend of Memorial Day weekend commencing May 2015 (Fri 22<sup>nd</sup>)
    - ◆ Deliver a PeopleSoft 9.2 verified and tested Production system by 7:00 am Tuesday May 26<sup>th</sup> 2015
    - ◆ Provide detailed “Go live” support documentation
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- **Post “Go live” support**
    - ◆ Provide Post “Go live” support to the satisfaction of the Clerk IT Staff
    - ◆ Provide detailed Post “Go live” support documentation
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- **Project Management**
    - ◆ Complete detailed project schedule; preferable in MS Project, updated weekly throughout the project
    - ◆ Complete risk and issue reporting throughout the project
    - ◆ Identify key project milestones and monitor completion of milestones throughout the project
    - ◆ Complete weekly status meeting with the Clerk IT staff and produce weekly status reports
    - ◆ Define project deliverables and monitor completion of deliverables throughout the project