



# APPLICATION SOLUTION CENTER UPGRADE SERVICES PROPOSAL



Peralta Colleges  
PeopleSoft Enterprise  
HCM and Campus Solutions 8.9 to 9.0

Proposal Date: January 30s, 2012

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## Foreword

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### Terms and Conditions

Oracle America, Inc. ("Oracle") is pleased to present you with the attached proposal for the software licenses and/or services referenced therein. As used in this document, "you" and "your" refers to the customer referenced in the attached proposal.

This proposal is intended for informational purposes and is not intended as a firm offer or commitment by Oracle to provide any software, other products or services. In the event you and Oracle proceed to negotiations regarding the software and services proposed hereunder, neither you nor Oracle shall be obligated in any way until such time as we each agree upon terms and conditions, and execute a final written agreement.

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In the event of any inconsistencies between the text in other sections of Oracle's proposal and the text of this section, the text of this section best clarifies Oracle's position and shall govern Oracle's entire proposal.

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## Definition

Throughout this proposal the term “solution” refers to and is interchangeable with “approach” or “system.” The term “solution” is not intended to, and does not, express or imply that Oracle can or will contractually or otherwise agree to, “solve” any issues or problems. It is used to express the concept that an approach to your project has been determined and that it is expected that that approach will leverage Oracle's products, methods and experience.

Throughout this proposal response, the term “partner” refers to and is interchangeable with “ally” or “collaborator.” Use of the term “partner” is not intended to, and does not, contractually or otherwise bind Oracle to you, or create a partnership, joint venture or agency relationship between you and Oracle.

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# Executive Summary

With Oracle Consulting, Peralta Colleges can be confident that our upgrade approach will effectively address your requirements. No one understands Oracle's Enterprise application technology better than Oracle Consulting; and no one implements or upgrades these applications better than Oracle Consulting.

Based upon the evaluation of stated requirements and system discovery information, Oracle is pleased to provide this estimate to Peralta Colleges for Application Solution Center services designed to upgrade your PeopleSoft Enterprise LS release 8.9 application to release 9.0.

The services outlined within this estimate are positioned to assist your organization in the steps required to complete your technical upgrade to the new Enterprise release and encompass a certified install, an on-line technical upgrade and Batch Jumpstart services. We believe that the services positioned will not only assist your organization in accelerating your upgrade but also reduce the risk associated with your project.

Our estimate does not include travel and living expenses, which are billed directly to Peralta Colleges, based on actual expenses incurred.

This document defines Oracle's approach for upgrade projects in the Application Solution Center using our Global Solutions Delivery model. The information contained in this document will serve as a guideline for project planning and execution, and covers the following topics:

- Application Solution Center Approach
- Scope of Work
- Project Organization and Staffing
- Project Effort, Schedule, and Fees

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# Application Solution Center Approach

Oracle Consulting suggests an upgrade approach, which leverages the Global Solutions Delivery Model. This model leverages the experience and knowledge of the Application Solution Centers and is based on Oracle's project methodology known as the Oracle Unified Method. The Application Solution Centers can support your project via value added services that are onsite, lab based, or remote. The Application Solution Centers give you the ability to tap into the deep upgrade and implementation knowledge of our consulting teams.

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## Project Overview

While the technical upgrade work is being performed remotely at the Application Solution Center, your project team can remain at your facilities focusing on project tasks that are more specific to your organization and environment. Once the Application Solution Center has completed the upgrade of your database in our lab, the Application Solution Center consultant will then travel to your facilities to perform the first Test Move To Production in conjunction with a resource from your upgrade project team.

The following is a list of some of the key upgrade project activities:

- **Scope Management:** While Oracle's Order Document has outlined the scope of the work to be performed by the Application Solution Center, any changes to the agreed scope are then addressed via amendments. During the technical upgrade, the Application Solution Center will provide the customer with weekly status reports detailing progress made in the lab.
- **Infrastructure:** To maximize the time while your database is in the Application Solution Center, you can work on preparing your infrastructure and environment to support the installation of the new PeopleSoft Enterprise release. Once the infrastructure conforms to the requirements of the new PeopleSoft Enterprise application release, an Oracle Installer will arrive onsite to perform the installation of the new release. This is important, as your upgraded database cannot be delivered back to you until the installation has been completed and certified.
- **Training:** Another task which our customers have scheduled while the database is being upgraded in the Application Solution Center is training for their project team. It is extremely important for your upgrade project team to attend the necessary training. This training is not only crucial in supporting the upgraded database when it comes back onsite but it is the basis on understanding the level of effort for preparing and conducting end-user training.

While Oracle can assist with end-user training, this proposal does not include that effort and as such, any customized end-user training materials or time spent delivering training for end-users during the transition is the responsibility of Peralta Colleges.

- **Upgrade Evaluation:** The Application Solution Center will perform a comparison between your Copy of Production database and a DEMO database at the same release. This is known as a "vanilla" comparison. The results of this vanilla compare will be provided to you for use in identifying

customizations that need to be carried forward into the new release. The Application Solution Center will also perform an analysis and comparison of your SQRs and Queries and provide deliverables indicating the field and record structure changes that you will need to make to those objects due to changes in the new PeopleSoft Enterprise release.

- **Technical Upgrade:** The Application Solution Center will perform and execute the technical tasks outlined in the PeopleSoft Enterprise Upgrade Instructions. However, some of the tasks outlined in the upgrade instructions will be your responsibility because the tasks are functional in nature or require an understanding of your data and business processes. The Application Solution Center will work with your project team to identify and communicate which of the tasks must be performed by your resources.
- **Customizations:** The Application Solution Center will reapply existing customizations to fields, record definitions and record-fields. Customizations to other objects will be retrofitted and unit tested by Oracle's Global Services Delivery team. The number of customizations was obtained from the Upgrade Services System Discovery form you completed.
- **First Test Move to Production:** The upgrade consultant from the Application Solution Center will travel to your facilities to assist with completing the first Test Move to Production process. During this time the Application Solution Center consultant will be working side by side with one of your project team resources providing guidance and hands-on experience during the Test Move to Production process.
- **Support Strategy:** Oracle's Application Solution Center will follow up with 30 days of upgrade phone support once the first Test Move to Production has been completed. The Application Solution Center will provide you with an Issues Log that must be used to record issues encountered and resolutions identified during the support period. Application Solution Center phone support is not intended to replace activities that would normally be directed to the Global Support Center or other onsite consulting services, but it is an additional level of upgrade support for the services and deliverables provided by the Application Solution Center.
- **Test Scripts / Acceptance Testing:** Peralta Colleges is responsible for test script development, unit testing, system testing, performance testing, and any other type of testing deemed necessary.
- **Test and Final Moves to Production:** As stated previously, the Application Solution Center consultant will work directly with your technical team during the first Test Move to Production, providing guidance and support to your team during this technical conversion event. Customers have the option of performing additional Test Moves to Production utilizing their own staff or by engaging resources from the Application Solution Center for additional support during subsequent Test Moves to Production or even during your Final Move to Production.
- **Resources:** While an upgrade is more technical in nature, it is important to not underestimate the level of effort it requires. Therefore, having the right technical and functional resources involved from the start of your upgrade project will help in making your upgrade a successful one.

## Scope of Work

This section contains the information provided by Peralta Colleges, which is used for our estimate, as well as the detailed scope of work for services included in this proposal.

### Current System Configuration

Environment Information	
Application to Upgrade:	HCM and Campus Solutions
Implemented Modules:	Student Administration Academic Advisement Student Financials Campus Community Human Resources Payroll Benefits Admn. eBenefits eProfile
Current Release:	8.9
Target Release:	9.0
Current RDBMS:	SQL Server
Target RDBMS:	SQL Server
Operating System:	Windows

Customization Summary		
Object Type	Modified	Added
Activity	2	5
Application Engine Sections	239	33
AE PeopleCode	5	41
App Package PeopleCode	2	0
Approval Rule Sets	1	21
Business Process	1	2
Business Interlink	0	0
Component	2	50
Component Interfaces	2	2
Comp Interface PeopleCode	0	0
Comp Interface Property PeopleCode	0	0
Component PeopleCode	1	1
Component Rec/Field PeopleCode	0	3
Component Rec PeopleCode	0	0
Field	0	0
Field Format	0	2
File Layout Definition	1	5
HTML	0	0

Customization Summary		
Index	0	0
Menu	0	6
Menu PeopleCode	0	0
Message Channels	0	0
Message Definitions	11	1
Message PeopleCode	0	0
Message Channel PeopleCode	0	0
Subscription PeopleCode	0	2
Page	116	66
Page PeopleCode	3	3
Page Field PeopleCode	0	0
Query	0	160
Record PeopleCode	89	118
Record Definition	0	0
SQL	749	282
Stylesheet	0	0
Scripts	0	0
Translate Value	5	213
SQR	0	0
SQC	0	0
Crystal Reports	0	0
XMLP Reports	0	0
COBOL	0	0
nVision	0	0

## Upgrade Services and Deliverables

Certified PeopleSoft Software Installation Time Estimate	
Installation of new release (on-site)	Week
Certified Installation Deliverables	
Pre-installation review	
Initial directory set up	
DEMO and SYS databases created, loaded and tested on one database server	
Minimum of two PeopleSoft Enterprise development workstations configured and tested	
Installation and configuration of the application server using BEA Tuxedo	
Installation and configuration of the process scheduler including SQR	
Installation and set up of PeopleBooks including Verity search engine	
Installation and configuration of the PeopleSoft Internet Architecture environment on the web server	
Application of all applicable "Required at Install" updates and fixes	
Installation verification test run against the DEMO database	
Information transfer on how to support the newly installed environment	
Certification of the install as a "PeopleSoft Enterprise Certified Install" upon completion	

### Application Upgrade and Batch Jumpstart Tier I Services Time Estimate

Application Solution Center Time (in lab)	5 Weeks
Test Move to Production (on-site)	2 Weeks
<b>Estimated Total Duration</b>	6 Weeks
Post Test Move to Production Phone Support	30 days

### Application Upgrade Deliverables

Upgrade overview session
Database packaging scripts and instructions
Vanilla Compare Reports (Copy of Production database compared to DEMO database at same application release)
Vanilla Summary document
Full Compare Reports (Copy of Production database compared to DEMO database at new application release)
Weekly project status reports
Upgraded Copy of Production database
Maintenance Pack applied to upgraded database, if available.
Move to Production instructions and scripts
Single point of contact for post-delivery phone support
On-site Test Move to Production and application of the Maintenance Pack, if available, to your DEMO database at the new application release

### Batch Jumpstart Tier I Analysis – Report and Interface Objects

#### Batch Jumpstart Tier I Deliverables – Report and Interface Objects

Listing of Report and Interface objects requiring no structure changes
Report of PeopleSoft Enterprise record, recordfield and field changes that relate to your Report and Interface objects
Report of key changes that relate to your Report and Interface objects
Report of renames that relate to your Report and Interface objects
Individual Report and Interface object reports identify record and recordfield changes, field structure changes, key changes and renames
Side by side comparison reports between your PeopleSoft Enterprise Modified Report and Interface objects and the delivered PeopleSoft Enterprise Report and Interface objects at the same release
Side by side comparison reports between your PeopleSoft Enterprise Modified Report and Interface objects and the delivered PeopleSoft Enterprise Report and Interface objects at the new release

### PeopleSoft Testing Framework – Jumpstart Service

Setup and Configure PeopleSoft Testing Framework (PTF)
Assist with creating up to five (5) sample test cases of easy to moderate complexity in your PTF environment as a demonstration of the PTF tool

### Additional Test Move to Production and Final Move to Production Support

Additional Test Move to Production Support Days	22 days
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### Additional Test Move to Production and Final Move to Production Deliverables

Test Move to Production instructions and scripts
Completed upgrade checklist and Change Assistant template
On-site or remote Test Move to Production

**Customization Retrofit and Unit Test**

Customization Retrofit	Duration: Up to 8 weeks 225 person days
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**Additional Test Move to Production and Final Move to Production Deliverables**

Retrofit Customizations
Unit Test Customizations

## Proposal Assumptions

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The following assumptions are made with respect to the services scope, estimated price, and activities performed during the period of performance.

1. Estimates provided in this document are based on information provided by Peralta Colleges. Therefore, the Oracle Application Solution Centers reserve the right to adjust or amend the estimates provided in this document in the event that additional detailed information is obtained relative to Peralta Colleges's functional and technical business requirements. Any additional business requirements, changes, or previously undisclosed information will have a direct impact (increase or decrease) on the estimates documented.
2. This estimate/proposal document does not reserve or guarantee a space or slot in an Application Solution Center for the upgrade to be performed. A firm reservation is only made after the Application Solution Center receives a fully executed Order Document.
3. Peralta Colleges's technical and functional resources have the necessary process knowledge, are empowered to make decisions and respond to the needs of the Application Solution Center, and complete all customer obligations. These resources will be available to the Application Solution Center on an as-needed basis and agree to provide prompt response or resolution to the Application Solution Center.
4. The Application Solution Center's scope of work is conducted primarily at an Oracle facility. However, the first Test Move to Production is conducted at Peralta Colleges facilities and it is expected that the upgrade consultant will have access to office space as well as the hardware and software including security rights and passwords where required in order to complete the upgrade.
5. Peralta Colleges will be responsible for the redevelopment of customizations as necessary, as well as, any additional set-up and security needed for the new release.
6. Cloned Object Definitions will be brought forward as Added Objects during the upgrade process.
7. Peralta Colleges will be responsible for any performance tuning required.
8. Peralta Colleges's technical infrastructure environment is on a PeopleSoft Enterprise certified platform and database configuration that meets all upgrade and new release requirements.
9. This estimate includes the upgrade of only one Copy of Production database.
10. Peralta Colleges will follow guidance provided by the Application Solution Center in preparing a Copy of Production database and environment that will be used as the target database during the first Test Move to Production at the Peralta Colleges site. This target database and environment must be tested and fully functional prior to the upgrade consultant arriving at your site.
11. Peralta Colleges's project team will attend any and all training courses necessary for supporting the new Enterprise release.

12. It is Oracle's intent to provide consistency in staffing. However, we may, from time to time, introduce specific skill sets or release an individual from the project whose skill set is not needed at the time. If the skill set becomes needed again, Oracle may bring in a different individual to complete the task.
13. Peralta Colleges will have the necessary project and executive management support to review and make timely decisions as well as coordinate the activities of this project with other Peralta Colleges projects that may be occurring simultaneously.
14. This estimate does not include Business Process Redesign/Integration.
15. The currency in this estimate is US Dollars

## Project Effort, Schedule, and Fees

### Project Effort

Based on information about Peralta Colleges's database, Oracle has created an estimate for the upgrade services proposed as identified in the following table

Upgrade Services	Effort
Certified Installation	1 week
Application Solution Center Technical Upgrade with Batch Jumpstart Tier I Services	5 weeks in lab 2 weeks onsite
1 <sup>st</sup> Test Move to Production	
Setup and demonstrate PeopleTools 8.5x PeopleSoft Testing Framework (PTF), assisting with the creation of up to five (5) sample test cases of easy to moderate complexity.	5 days
Additional Test Move to Production Support Days	22 days
Customization Retrofit and Unit Test	Up to 8 weeks 225 person days

### Project Fees and Payment Schedule

Oracle is pleased to offer the services specified in this proposal on a Fixed Price and Time & Materials basis. The estimate of project fees as related to the consulting services required for upgrading your PeopleSoft Enterprise application as described in this proposal is outlined below.

Actual and reasonable travel and out-of-pocket expenses, and state sales tax, if any, are not included in the estimate set forth above and will be invoiced separately. Oracle Corporation intends to invoice Peralta Colleges based on services completed as identified below while travel and living expenses will be invoiced monthly. Invoices are payable net 30 days.

For each milestone listed in the payment schedule Peralta Colleges agrees to pay the listed amount upon receipt and acceptance of the deliverables:

Description	Fee Basis	Estimated Fees
Completion of the PeopleSoft Enterprise Campus Solutions Installation and Certification	Fixed Fee	\$12,000
Completion of the Application Solution Center Technical Upgrade with Batch Jumpstart Tier I Services <ul style="list-style-type: none"> <li>▪ Vanilla Compare Reports</li> <li>▪ Vanilla Analysis Spreadsheet</li> <li>▪ Batch Jumpstart Tier I Analysis Spreadsheet</li> <li>▪ Data Mover export of the upgraded PeopleTools tables</li> <li>▪ Upgrade Notes document</li> <li>▪ 1<sup>st</sup> Test Move to Production Support</li> <li>▪ 30 day phone support</li> </ul>	Fixed Fee	\$108,000
PeopleSoft Testing Framework (PTF) Jumpstart <ul style="list-style-type: none"> <li>• Setup and demonstrate PeopleTools 8.52 <i>PeopleSoft Testing Framework</i> and assist with creation of up to five (5) sample test case of easy to moderate complexity</li> </ul>	Fixed Fee	\$12,000
Additional Test Move to Production Support Days <ul style="list-style-type: none"> <li>• 22 days Days</li> </ul>	Time & Materials	\$42,504
One time VPN setup fee to support Customization and Retrofit service	Fixed Fee	\$1,000
Customization Retrofit and Unit Test <ul style="list-style-type: none"> <li>• Duration Up to 8 weeks</li> <li>• 225 person days</li> </ul>	Time & Materials	\$128,960
<b>Total Project Fees Estimate</b>		<b>\$304,464</b>

For budgeting purposes, travel and living expenses can be estimated at approximately 15% of the total billable fees, although Oracle will endeavor to staff this project with a remote team in order to minimize expenses.

### Acceptance Criteria

Oracle will provide the work outputs listed above. Peralta Colleges will review and if the deliverable does not conform to the description for such deliverable, Peralta Colleges shall have five (5) business days, which will be referred to hereafter as, “acceptance period”, after Oracle’s submission of the deliverable to give Oracle written notice documenting the deficiencies in detail. Oracle shall use reasonable efforts to promptly cure any such deficiencies. After completing such cure, Oracle shall resubmit the deliverable for your review and testing as set forth above. If you fail to provide written notice of any deficiencies within the acceptance period, as provided above, such deliverable shall be deemed accepted at the end of the acceptance period.

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# Application Solution Center Overview

Since Oracle's Application Solution Center's beginnings in 1997, we have consistently delivered value, quality, and customer service to more than 1000 customers. The Application Solution Centers provide customers with an integrated bundle of services for every type of upgrade they may need to perform. Application Solution Center consultants collectively have the greatest exposure to and most extensive experience with PeopleSoft Enterprise upgrades compared to any resource available to Oracle's PeopleSoft Enterprise customers. Each Application Solution Center employs a dedicated high-speed technical infrastructure and environment in addition to the breadth and depth of upgrade experience provided by the upgrade consultants. Each Application Solution Center project utilizes an ISO certified process, containing seven Quality Assurance checkpoints, that has been real world tested across a broad spectrum of products, platforms and upgrade paths. These are unique assets that allow the Application Solution Centers to provide a distinct suite of deliverables that produce an upgrade solution with lower costs, shorter upgrade time lines, and higher quality than any other upgrade alternative. This translates into successful upgrade projects for customers who utilize the Application Solution Centers.

The Application Solution Centers maintain a strong working relationship with Oracle's PeopleTools and PeopleSoft Enterprise application development teams. At times of new product releases, the Application Solution Centers have received code lines early to assist with final acceptance testing. The Application Solution Centers are also continually working with Oracle's development organization to develop new ways to accelerate your upgrade.

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## Advantages of Using the Application Solution Centers

### **Unparalleled Experience**

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Application Solution Center consultants deliver upgrade services every day of the week during every week of the year. Experience is gained with pre-release versions of PeopleSoft Enterprise applications and applied during the hundreds of upgrades performed each year in the Application Solution Centers. The upgrade consultant's experience with the tools, technologies, and processes are unparalleled. Their skills and experience enable them to mitigate the risks and challenges that upgrade projects may present. The Application Solution Centers have also developed unique approaches and tools to minimize the impact of these risks and challenges on your upgrade timeline and end product. We can assist you even if you have little or no documentation of your customizations as their services include deliverables that highlight your changes.

### **Reduced Costs**

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Application Solution Center upgrade services are fixed fee and fixed duration. The efficiencies built into our process enable low cost, value-added services with assured quality results in a specific time frame. You know in advance what your external costs will be and the dates on which you can expect the results to be delivered.

Each upgrade brings with it a unique set of technical and process challenges. The upgrade tools change, as do the methods by which the tools are executed. By utilizing the Application Solution Center for your upgrade project you eliminate the expense associated with developing in-house experience required to perform the technical upgrade process. This also enables you to gain efficiencies by assigning your resources to other activities related to your upgrade project such as batch work and interface analysis or even to other initiatives within your company outside of your upgrade project.

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### **Faster Upgrades**

The Application Solution Centers utilize our own dedicated environments and system administrators. This allows our upgrade consultants to move through the technical elements of the upgrade without having to compete for your systems processing time or support. Furthermore, the standard approach and vast experience of the Application Solution Center consultants enables them to identify and reapply your customizations quickly and with limited customer involvement. Overall, the technical upgrade activities are performed much faster than they could be accomplished, if performed on-site.

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### **Fixed Deliverables**

The ISO certified Application Solution Center services include a standard set of deliverables that are defined in advance and provide value added information to your upgrade project team. These deliverables include information related to the overall upgrade process, standard approaches employed, and detailed notes on how your customizations were handled during the upgrade.

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### **Coordinated Communication**

Each upgrade performed by the Application Solution Center is assigned to one of our upgrade consultants who will serve as the project owner. This Application Solution Center consultant will be your primary contact during the upgrade process and establishes regular communications with your upgrade project team. Good communication is one of the keys to the success of your upgrade project.

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### **Less Post Upgrade Work**

Upgrades performed by the Application Solution Center will also include the application of the most recent Maintenance Pack, if available, which will bring your upgraded database update and fix current through a defined point in time. This reduces the amount of work left to your project team once the upgraded database is delivered because a large percentage of the updates and fixes for your application will have already been applied. The Maintenance Pack is also applied to your new release DEMO database while our Application Solution Center consultant is on site.

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### **Easier Future Upgrades**

The Application Solution Center consultants can provide suggestions on the desired and best practices approach for the design and development of your customizations. Good design and development practices can minimize the impact customizations have on future upgrades. The breadth and depth of experience of our upgrade consultants enables them to provide you with valuable guidance in this area.

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### **Commitment to Satisfaction**

The Application Solution Centers are committed to your satisfaction and success. Every customer is considered a partner and every upgrade is the most important project on our schedule. We are dedicated to seeing your upgrade project through.