**Jeremy Boyd**

36 Mariele Drive

Fairfax 94930

415 3163702

[boyd\_jj@hotmail.com](mailto:boyd_jj@hotmail.com)

# **OBJECTIVE**

To deliver superior solutions in the SAS/Data Warehousing/Financials/Treasury/ETL/OBIEE and Business Intelligence arenas.

##### SUMMARY

My background includes Financial Mathematics. I have modelled many different kinds of financial instruments for Peoplesoft and am an expert in this area, including Cash management and Deal management. I am keen to extend this modeling to the SAS arena.

I have been working in DataModeling/Datawarehousing (HR/Financials) with ERP packages in technical and functional roles for approximately 15 years, including 3 years creating and implementing the financial analytics DW at PeopleSoft, Inc, focusing in part on modeling and predictive analytics. More recently I have been involved in a large DWH using SAS/Hadoop using a feed from PeopleSoft. My product experience includes SAS, OBIEE/OBIA, PeopleSoft Financials, Treasury (Bank) 9.2, Cash Management 9.2, Deal Management 9.2, EPM 9.1 with Budgeting/Profitability, Balanced Scorecard, Activity Based Management, Global Consolidations, FSI Analytics, AP, GL, AR and Upgrade Toolkit. My technical experience includes customizations involving Peoplecode, App Engine, VBA, Oracle stored procedures, very detailed (and successful) performance tuning and more. I have also held a wide breadth of functional lead roles including business analyst and project costing, planning, and analysis of requirements and fit gap.

I have worked extensively with ETL (15 years), in Informatica and Datastage and more recently SAS DI. I have created simple and very complicated jobs and solved complex performance issues (sometimes through a simple redesign, other times rearchitecting the functionally of the solution).

In every large project I have worked on I have assumed an architectural role, ensuring the solidity of the design, the correctness of the functionality and the timely performance of the solution.

My SAS and PeopleSoft certifications and extensive project experience position me as a strong candidate for any SAS Analytics/PeopleSoft/DW implementation. I have worked well in high-pressured fast-moving “firefight” environments and have demonstrated that I am a valuable team member. I have led numerous DW/Peoplesoft projects (full life cycle implementations) in the past seventeen years in both senior functional and technical roles.

I am well versed in the Rational Unified Process (subsequently Agile). While at CSC I used it to build the C/C++ software that took us from a local company (Bank of Illnois, Champaign) to a very large national player (the second largest wireless billing company in the US prior to purchase by Amdocs). More recently we have use scrum techniques as a project review for the SAS project at UNC.

SAS Certifications

* SAS Predictive Modeling using Enterprise Miner 13.1
* SAS Advanced Predictive Modeling

###### PeopleSoft Certifications

###### Certified PeopleSoft Technology Consultant

###### Certified PeopleSoft EPM/ Profitability Consultant

SAS Training

SAS Programming I

Applied Analytics using SAS Enterprise Miner

Neural Network Modeling

Predictive Modeling using Logistic Regression

Data Mining for Big Data

Putting Open Source Models into Production (R/Python)

Text Analytics using Text Miner

Time Series

Experimentation

Optimization

###### **SKILLS SUMMARY**

SAS • SAS Visual Analytics 7.1 • Hadoop HDFS • SAS Base programming

• SAS Enterprise Miner 13.1 • Logistic Regression • In Memory Statistics (IMSTAT)

• Neural Networks • Text Analytics • Time Series Modelling

###### Oracle • EPM Enterprise Warehouse • EPM Financials Warehouse • EPM Budgeting / Planning

Products/ • EPM Balanced Scorecard • EPM FSI Analytics • EPM Global Consolidations

• EPM Activity Based Management • PeopleSoft Banking

PS Modules • Ascential Datastage v8.1, 8.5 • PeopleSoft Treasury • PeopleSoft GL

Up to incl 9.2 • Cash Management • PeopleSoft AP • Financial Gateway

• Deal Management • Business Objects • STAT

• OBIEE/OBIA 11g • Informatica v5.1/6.1/7 • SAS DI Studio 4.8

PeopleSoft • Application Engine • Peoplecode • PTools/Security

Technical • Integration Broker • Component Interface • Application Messaging

• Application Designer • nVision/Crystal/Reporting • PS Query

• Allocation Manager • Data Manager • Datamarts / Cube Manager

• SQL/SQR • Tuxedo/Web & App Server • Data Mover

Operating • UNIX/Linux/DOS • Mac OSX • Windows 2003/2010

Systems

Databases • SQL Server 2010 • Oracle 8.x, 9i,10,11,12c • DB2 OS390/UDB

**EXPERIENCE**

**Oracle University, Amsterdam, Netherlands (01/2017 – 02/2017)**

Presented a technical course on the new features in 8.54/8.55 Peopletools and two functional courses on the new features of PeopleSoft Financials 9.2

**SAS Academy for Data Science(part 2), SAS Institute, World HQ, Cary, North Carolina (07/2016-09/2016)**

Undertook the advanced section (part 2) of the SAS Data Scientist programme, a six week full time course. This provided in depth knowledge and (through real world projects) practical experience of SAS’s most important data analysis tools and advanced programming techniques, such as Enterprise Miner, Proc Neural, In memory Statistics (IMSTAT), Visual Statistics, Text Mining, R/Python (calls from SAS), Time Series Modelling amongst others.

*Data Analyst/Warehousing,* ***PeopleSoft HCM/FMS/Campus, SAS, University of North Carolina, Chapel Hill (02/15 – 10/16)***

* Developed and expanded existing SAS warehouse
* Developed Reporting capabilities using SAS DI/Base code and SAS VA
* Extensive reporting on HR/Financials/Student

Primarily used as a PeopleSoft Warehousing architect implementing SAS solutions. Expanded financial and hr/budget reporting capabilities of the warehouse and brought in Campus data for further reporting. The warehouse was used for all financial management as well as hr/campus reporting. Significant customizations to PeopleSoft financial processes resulted in the use of a customized SAS warehouse rather than a prepackaged solution, with dozens of bespoke ETL jobs. Discovered and remedied/proposed solutions for various ETL/warehouse design issues that slowed performance and/or delivered incorrect results.

*Planning and Budgeting,* ***Kamehameha School Bishop Estate, Honolulu, Oahu, Hawaii (08/12 – 05/14)***

* Constructed Planning and Budgeting Warehouse datamarts using datastage 8.5/EPM 9.1
* Implemented Planning and Budgeting Application (Security/Workflow, Users, Staging, Import/Export)
* Part of 9.1 Financials/Procurement implementation
* Allocation Manager

Brought in to implement Planning and Budgeting. Client was on Pillar 5 (Hyperion). Implemented datastage maps using PeopleSoft Financials 9.1, building EPM data structures and Budgeting data maps. Once the maps were fully loaded, set up the Budgeting application (Staging/Workflow/Model). After the iterative processes were completed (i.e. after budget approval), the budgets were exported back to GL (using Commitment Control). Used Allocation Manager to allocate budgets within cost centers. Post project/implementation, involved in limited off-site support.

*Treasury/Banking/CashManagement*, *Trainer/SME* ***Oracle University, Geneva, Switzerland (11/13 – 12/13)***

* Delivered Treasury 9.2 class to high profile client in Geneva, Switzerland, covering full functionality of Bank, Deal and Cash Management. Highlighted changes implemented in 9.2. Reviewed training materials and suggested changes.

*Campus Solutions/OBIEE,* ***University of Texas Health Sciences, Houston, Texas (05/12– 11/12)***

* Constructed CS Warehouse datamarts using datastage 8.1/EPM 9.1
* Implemented OBIEE 11g (Security, Users, Queries, Repository (rpd) changes), OBIA

Brought in to fire fight delivery dates for Campus Solutions datamarts/OBIEE solution. Starting from scratch and working with datastage maps, EPM setup issues and OBIEE set up to get the nine Universities live at the targeted deadlines. OBIEE work included functional analysis, OBIEE design (adding physical/virtual fields to physical/business/presentation layers), developing dashboards, developing migration strategies, security as well as fixing metadata (repository and catalogue). Worked with and customized delivered (student) financial analytics (OBIA).

*Trainer/SME,* ***Oracle University, London, UK******(02/12– 02/12)***

* Delivered advanced course on datastage 8.1
* Delivered advanced course on EPM 9.1 (incl OBIEE)

Delivered advanced course on EPM 9.1 and datastage 8.1 for Oracle University. Vetted course materials and suggested improvements.

***(12/10– 07/11)***

*Principal Consultant:* ***UNHCR, Geneva, Switzerland***

Senior Budgeting Analyst - Functional Lead

* Helped design and test highly complex front end to EPM Budgeting 9.0
* Modified tool required to enter and validate over 170 budgets
* Designed all tests, management and review of results
* Created various document delivers such as financials design document for the product
* Assisted with defining the scope of the project.
* Helped with (technical) roll out of product to production.
* Presented technical designs to assist with security and performance issues
* Worked closely with PM to define deliverables, major milestones, and timeline to present to Steering Committee.
* Helped resolve critical issues that arose in testing and production

The UNHCR is an agency of the United Nations charged with assisting over a million refugees, stateless persons and internally displaced people across the world in almost every country. I worked as a budgeting specialist, helped develop bespoke highly complex budget and planning software that interfaced to PeopleSoft Budgeting and GL. Performed some analysis on changing budgeting from Cashflow based to IPSAS. Worked on the financial analysis team developing advanced functionality across 192 operations covering budgets totaling three billion dollars. Developed testing methodologies to ensure high quality delivery of software to all bureaus.

***(11/09 – 12/10)***

*Principal Consultant:* ***Prologis (Denver/Amsterdam)*** – PeopleSoft Treasury/Cash Management/Financial Gateway/AP/GL/AR

Senior Technical Consultant

* Designed and wrote Peoplecode modules to implement Direct Debit functionality within Cash Management/Treasury.
* Design made use of object overloading to handle DD for 14 different countries identified by IBAN
* EDIFACT coding used for payment files.
* Payment files sent to bank for immediate processing.
* Designed test documents for the system.
* Resolved dozens of Cash Management/Bank reconciliation issues.
* Cash Management: Designed/Tested and implemented a loan facility analysis system for Poland/Hungary. Highly complex (about 250 spreadsheets, each of about 8 sheets) with no oversight, reduced to a 8 screen application with automated input of spreadsheets to Peoplesoft tables (with full oversight)
* Coded changes and reports (nvision) to handle/report East European VAT
* Designed and coded various changes for AP, such as allowing multiple addresses per vendor

Worked as Treasury/Cash Management specialist designing and implementing Cash Management Direct Debit interfaces for all European markets. Designed and implemented fixed interest loan analysis program for Eastern European operations (mainly Poland). Also provided AP specialist work, designed and coded various bespoke changes to Voucher Approval, European VAT as well as interfaces to third party systems.

***(05/08 – 06/08)***

*Principal Consultant:* ***Banamex, Mexico City*** – PeopleSoft EPM 9.0/Treasury (Instrument Modeling)/CM – Banking / Financials Data Warehouse

Senior Functional/Technical Consultant (Design phase, development offshored)

* Created technical design specifications based and functional design documents – specifically in the OWS (operational warehouse storage) and MDW (multi dimensional warehouse) area. This included datamart design, star schema, and more.
* Worked closely with data architect and functional team for development.
* Part of various design workgroups for overall functionality.

Working as EPM/GL Architect (Banking/Treasury specialist) for a Citigroup project in Mexico City. This was a financial transformation project, redesigning the GL and implementing a Financial Data Warehouse to support Global reporting within Citigroup including reconciliation and reporting of GL to Instrument and legacy systems. Used Allocation Manager to distribute costs.

***(03/05 – 05/08)***

*Principal Consultant:* ***ING, Amsterdam*** – PeopleSoft EPM 8.9, GL, Ascential Datastage

* Provided expert knowledge on EPM/Profitability functionality (incl ABM) and OWS/MDW to allow implementation of complex GL functionality within EPM/Profitability.
* Helped design and test Ascential Datastage ETLs for new functionality
* At the same time, existing data flows and processing needed to be maintained (mostly delivered functionality with normal amount of customizations)
* Designed end-to-end testing to allow quick detection and resolution of design/code errors and more efficient roll out of high quality code
* First implementation in the world of shared chart of accounts between (large) insurance companies and banks
* Global Consolidations used to aggregate business units

Worked as Dev./Test/Performance Team lead and EPM/GL Architect for IT. Major GL functionality worked on (Workflow, Intercompany, Allocations, Journal Postings, Global Consolidation, Combo-Editing, Spreadsheet import, Security) was implemented via Peoplecode in EPM. Project involved testing and Development of Financials Banking/Insurance data warehouse, for a very large project focusing on implementation of a single GL across all (thirteen) business units that are part of the ING group (9th biggest in the world), and the enrichment of that GL to an exploded Profitability ledger (11 to 22 dimensions) in the Financial Warehouse for reporting purposes. This was the first instance of (large) Bank and Insurance companies sharing the same GL. We also did a lot of work on control structures and reconciliation between source systems/GL/EPM, any adjustments being processed via a custom meta-layer to the GL and EPM applications. Implemented Global Consolidations across the business units. More recently focused efforts as performance specialist to solve several long term performance problems.

***(12/03 – 01/05)***

*Principal Consultant:* ***Rabobank, Utrecht***– PeopleSoft EPM/Profitability 8.4, Informatica PowerCenter 6.1/7.1

Lead Functional and Technical Consultant.

* Designed and tested new Informatica data maps to handle new functionality
* Changed existing (custom) data maps that were overly complex and duplications of existing functionality
* Worked on redesign of several very slow data maps that were threatening production timelines (reduced from hours to minutes)
* Solely responsible for functional and technical performance of sourcing of data (OST, Informatica), processing in OWS and MDW...
* Worked closely with key users to ensure system delivered expected results.
* Redesigned reconciliation between GL and EPM.
* Assisted functionally with Fire 1.3.1 regulatory reporting.
* Extensive knowledge transfer to functional analysts and users.

Served as the EPM (Treasury Analytics)/GL/Performance specialist for PeopleSoft 8.4 Financials Data Warehouse. The warehouse data was sourced for Fire 1.3.1 reporting, as well as being used for FTP processing and Trade (Instrument) to Financial GL reconciliation. The data was loaded via OST and Informatica into a highly customized warehouse, the result of not understanding the delivered warehouse (functionality was duplicated via customizations that were expensive in development time and to run).Primary responsibilities included expert functional and technical lead advice for EPM/GL, specifically with regard to the architecture and performance of the systems. By redesigning business processes and small sections of the warehouse, we were able to cut down the time of some complex maps (reconciliation) from 3 hours to 15 minutes**.**

***(06/03 – 12/03)***

*Principal Consultant:* ***Sprint, Kansas City*** – PeopleSoft EPM Profitability Budgeting/ ABM/Supply Chain 8.8, Informatica 6.1

Lead Technical and Functional Consultant.

* Met with decision makers and discussed requirements and scope of PeopleSoft EPM product.
* Helped resolve issues with BAM server.
* Helped design and implement complex AE programs that fed Supply Chain insights.
* Resolved issues relating to GL.
* Identified gaps in the project plan and assisted in developing potential solutions to overcome issues.
* Evaluated current system setup and options and provided solutions to existing challenges.
* Worked with PO and IN modules to ensure correct functionality of Analytics

**S**erved as the systems EPM/GL specialist for PeopleSoft (8.8) Supply Chain/BAM Budgets implementation. This was a beta site for BAM and a PeopleSoft Inc. alpha development site for supply chain. Data was fed in via Informatica into the warehouse, where it was processed by the custom AE programs that technically prepared the Supply chain insights. Primary responsibilities included expert technical and project lead advice for EPM and GL, specifically with regard to the architecture and the impact of custom developments. Also worked with GL, AP, PO and IN.

***(11/02 – 05/03)***

*Principal Consultant:* ***DST, Kansas City*** – PeopleSoft EPM Profitability ABM 8.3, Profitability Insights, Informatica 6.1

Lead Technical and Functional Consultant for EPM ABM.

* Worked closely with development team to design profitability insight.
* Resolved critical issues relating to inter-alia metadata issues.
* Evaluated current system setup and options.

DST published current valuations for (all) mutual funds. Served as the systems architect/EPM/GL specialist for PeopleSoft (8.3) ABM/Financial Insights/Profitability Insights implementation. The project included a separate (but parallel) Financials 8.4 that served as the source of record for the EPM system. The project was in four phases, each phase covering some of the twelve different reporting companies. Primary responsibilities included providing expert functional and technical advice for EPM and GL, specifically with regard to the architecture and the data marts.

**Prior experience**

(09/02 – 11/02)

*Principal Consultant:* ***Verizon, Dallas, TX*** – PeopleSoft EPM Profitability 8.3, Informatica 6.1, GL

Lead Technical and Functional Consultant

* Defined EPM data structures to support business requirements.
* Assisted with ETL mappings of legacy data to EPM data structures (ODS and MDW).
* Evaluated current system setup and options.
* Determine best approach, design, and created several deliverables addressing key concerns and issues.

**PeopleSoft Consulting Inc.**(Pleasanton/Chicago) (01/99 – 03/02)

**Senior designer/SME EPM Data Profitability Warehouse/FSI Treasury Analytics (CM) / PeopleTools 8.x**

* Principal technical designer of Profitability Warehouse/Financial analytics (see Cash Management).
* Wrote C++ code used for derivative analysis and hedge management
* Beta group for PeopleTools 8.x, assisted Ptools team with development of integration broker and component interfaces

A lot of the work within Financial analytics has been carried over (in a simplified version) to Cash Management.

***Engagements:***

**SunTrust, Atlanta; Project Manager/EPM/FSI Profitability Specialist; FTP/FSI/ETL Implementation**

Worked as Project Manager/FSI Specialist (functional and technical) at second phase (instrument level) implementation, as well as providing expert support for very detailed and extensive use of Warehouse functionality. There were several complex in-house custom programs written that extended the Warehouse and the metadata within the warehouse.

**PreSales, Paris, France; EPM/FSI Specialist; Insight Analytics, Cashflows, Profitability**

Worked on a three month pre-sales implementation of FSI EPM and Financial Insight using Data Manager for allocations. This involved extracting  data from flat files, populating custom tables (to drive data manager), populating FSI tables, running FSI programs and posting results to GL, and finally running a customized Insight engine to produce reports. Our competitors were Oracle Financials and Informatica. We were successful with this sale.

**WAMU, Seattle; FTP/FSI/ETL Profitability Implementation**

Worked as a System Architect/FSI Specialist (functional and technical) on the implementation of the PeopleSoft EPM and GL FSI product. The project implemented the FTP module of FSI and required extensive ETL work transferring the data from the legacy system into the PeopleSoft Warehouse. Substantial technical and functional problems were resolved by the solution that I designed and implemented. .

**Bespoke PreSales, Belgium, EPM/FSI Profitability specialist**

Developed a bespoke application to do complex allocations for a European bank. There was a reasonable size of input data that had to be processed (allocated) during the demonstration, involving some fairly complex rules, and the design had to be flexible so that within the demonstration they could completely change a rule and check the resulting allocations. I designed and implemented a data driven solution. We were successful with this demo.

**Societe Generale; EPM/FSI Profitability specialist; FTP/FSI/EPM Implementation**  
Worked on the first implementations of the PeopleSoft EPM FSI 8.0 product, at a key customer in Europe. The project revolved around changing the nature of the EPM product, from a transactional system to a system of record, but at the same time to run the standard processes in the new framework. The tasks required included mapping legacy system data to the FSI model, developing new Application Engine programs to support new functionality, and enhancing standard processes to work seamlessly in the new environment. Some of these changes have now been included as a major enhancement to the product.

**PeopleSoft Financial Profitability Datawarehouse Development team, Pleasanton CA**

Worked as a key member of the Development team, designed and wrote C++ Cashflow engine at the heart of the FSI 8.x product, in a project lasting a year. This task required in depth knowledge of Financial Derivatives theory and data structures, EPM architecture and the Data warehousing techniques employed by PeopleSoft.

**Computer Sciences Corporation, Champaign, I** (01/96-01/99)

Project Manager/Telecom Specialist/C++ Lead/Unix/System Architect

Worked as a Project Manager and SME, developing key elements of a Customer Care billing system in C++/C/Java and Visual Basic using Ingres and Oracle under HP UX. Managed a team of between 6 and 20 programmers, developing critical new functionality. First implementation in the world of real time rating for cellular telecommunications. Worked as a Systems Architect developing a state-of-the-art call rating system

# **EDUCATION**

Awarded BS Honours degree in Computer Science (1st Class) after a BS in Statistics (started university at 16) both from University of Cape Town.

Completed MSEE coursework (1st Class) during final year of BS Honours.

Completed mini-MBA (7 month programme) at University of Witwatersrand, Johannesburg.

*References furnished upon request*