

SUMMARY

- Consolidate multiple data-warehouse environments from several external sources into a centralized environment. Creating synergy with internal and external data sources to enhance company decision making from reactive to preventative. Technically used SSIS and SSMS
- Financial Enterprise System (OLAP) and Financial Enterprise Project Management system implementations. Enhanced Financial models, implemented OLAP cubes, developed automated data flows from multiple data sources to create transparency in operations of decommission project. Technically used SSAS and Oracle Hyperion.
- SharePoint Migration from legacy systems (Lotus Notes) to O365 online. Convert the company data files, portal sites and developed intranet site. Technically used SSIS, HTML, CSS, JavaScript.
- Standardized reporting for company that converted migration from legacy reporting. Decreasing reports from over 200 to 60 that included KPI, Dashboard, Scorecard, Summary, and detail reporting that was drillable for all levels of the company. Technically used Tableau, PowerBI, SSRS and Visual Basic.
- Manage project teams of 8 developers and 5 developers. Skills included ETL development, SQL Development, creating automation, Job scheduling, automated logging and standardizing reporting, SharePoint administration and development and web development.

TECHNICAL SKILLS

- *Programming Languages:* MS SQL (9 years), Visual Basic(13 Years), HTML, CSS, JavaScript (2 Years), Informatica (1 Year), Python(1 Year), R (1 Year), PostgreSQL (3 Years), VBA (12 Years)
- *Database Applications:* MS SSIS (9 Years) [Kingswaysoft, Zappysis] , SSAS (5 Years)
- *Reporting:* Tableau (4 Years), PowerBI (2 Years), SSRS (9 Years), Crystal (10 Years), OBIEE(4 Years), Oracle Hyperion (8 Years), Cognos (2 Years), Microstrategy (5 Years), ACL (1 Year)
- *ERP Systems:* Oracle 12 Applications (8 Years), Dynamics 365 – HB1 (2 Years), JDEdwards (5 Years), Primavera, Cobra (2 Years), CostPoint, Khalix (3 Years), Solomon, DB2 Platinum (5 Years), PeopleSoft (2 Years), Sage 300, Process Shipper, Ultipro, Paycom
- *CRM systems:* Dynamics 365 (1 year) , Salesforce / Marketo / In-contact (1 year) , PPMS (1 Year)

PROFESSIONAL EXPERIENCE

Upwell Health

2019 – Present

Senior Director of Business Intelligence

- Strategically designed Enterprise Data Management environment by redesigning business processes and architecture. Centralized key business functions to synergize data across multiple platforms. Developed data marts to standardize business processes (Customer Experience, Operations, Finance, HR, Sales, Marketing, etc.).
- Removed legacy data-warehouse environment due to instability of on prem infrastructure. Replaced with AWS environment (S3, EC2, Redshift, RDS).
- Identified existing reports from various ad hoc reporting tools. Consolidate and reduced 300 + legacy reports to 70 standard reports. Removed duplicate, redundant and unutilized reports.
- Assigned to the CRM steering committee to implement new CRM system. CRM software integration included Salesforce, Marketo and In-contact. Redesigned customer journey experience and business process. Project is currently in progress.

Woodside Homes

2013 – 2019

Director of Business Intelligence

- Strategically designed and implemented a consolidated data-warehouse (Star Schema) with company-wide financial and operational information. Streamlined processes by simplifying complex data structures, developing historical databases, automating ETL logging, creating change management infrastructure. Enhanced processing efficiency through indexing, data replication and SSIS ETL automation (SQL extract, transformation and loading), MaxL scripts and Transact SQL. Migrated AS-400 legacy systems to MS SQL Server 2012, 2016, 2017 and Azure Cloud environment. Technically used SSIS, SSMS, and T-SQL
- Financial Enterprise System Implementation Oracle Hyperion (OLAP Cube: Sparse and Dense dimensions). Imported 3,614 Accounts, 5,551 Business Units, and 671 Projects. Developed automatic outline and substitution variable updates, real time processing (actuals), and 3 pass processing (ITD Load, Mthly Balances, Units). Integrated working and periodic forecasting, bottoms up and top down planning. Processing speed in comparison to the prior system is 9 times faster. Facilitated training for executives, controllers and operational management. Technically used SSAS, Oracle Hyperion, Visual Basic, Microstrategy.
- Established and facilitated data governance steering committee with senior management. Established company policy and procedures that included ownership, accessibility, quality, and data recovery. Designed Metadata infrastructure and facilitated periodic meetings with management that covered BI maturity, CRM status, data recovery, and critical business functions.
- Migrated to Microsoft PowerBI, Tableau and SSRS standard reporting from multiple legacy sources (manual ad hoc reporting). Integrated web base reporting (dashboards, KPI's, interactive inputs). Consolidated 250 legacy reports to categorized business functions that contained interactive inputs. Technically used PowerBI, Tableau, SSRS, Microstrategy, Visual Basic, R.
- Managed SharePoint administrator and developer. Directed rollover from legacy systems, migrated divisions and corporate and implemented new processes correlated to the data-warehouse. Supported multiple portal sites that included: community life cycle, human resources, policies and procedures, centralized reporting, land project management, legal, finance and CRM. Technically used HTML, CSS, JavaScript.
- Compiled consolidated financial statements and direct and indirect cash flow projections. Examined favorable and unfavorable results and reported to the board/executives. Process month end closing for financial, and unit results. Collected, compiled and created yearly divisional planning packages to report the company's yearly goals to the board/executives. Developed a bottoms-up plan and forecasting model (Consolidated Financial Statements). Technically used Tableau, PowerBI, SSRS, Visual Basic, Dynamics 365.
- Directed Shared Services Console and Business Intelligence Administration. This included artifact migration, security provisioning (Active Directory/SSO), archiving, monitoring data backups (cloning, database maintenance) and server maintenance.

Energy Solutions

2007 – 2013

Senior Financial Analyst

- Develop data processes for project scheduling and financial reporting. SSIS ETL automation (SQL Extract, transformation and loading) to a centralized datawarehouse using MS SQL Server. Funnelled data from numerous systems, such as Oracle Applications, Success, Primavera, and Cobra.

Manipulated the data to report Earned Value Management System (EVMS) reporting. Technically use included SSIS, MYSQL, SSMS, T-SQL, Oracle Applications, Success, Primavera, Cobra.

- Utilize Crystal Reports with T-SQL to report monthly financial results, including profit and loss and operational results; outlining analysis of production, budget and forecast, and actual result for the license stewardship project. The project established 25 standard reports that created transparency in all levels of the decommission project.
- Use MYSQL and Oracle Business Intelligence Enterprise Edition (OBIEE) reporting to strategically plan and improve key financial and performance reports for the entire company. Recognize key system development concerns encountered throughout Oracle development process, and produce numerous reporting solutions (Financial: budget, forecast, actual, Operations). Reports gave transparency to the Commercial Division. Streamline different stages of project performance, including request for proposals, engineering, pricing, and sales and marketing; as well as performance of movement, fabrication, decommissioning, and closing. Technically used SSMS, MYSQL, PostgreSQL, OBIEE and Crystal Reporting.
- Create Key Performance Indicator (SOX KPI) tracker database system (MS SQL Server) with Crystal reporting and Business Objects Enterprise. Develop standard process to report Risk Matrix and Control mitigation scripts. Automate distribution to key stakeholders for review and approval processes. Technically used SSMS, Crystal Reporting, MS Access.
- Used the Earned Value Method, Earnings to Completion, and Earnings at Completion to determine financial rates for revenue, burden, overhead, local and corporate selling general and administrative expenses (SG&A), and facility allocations. Correlated contract rates and agreements back to the Project Management Accounting Review documents to ensure proper recognition of revenue. Technically used SSMS, Oracle Hyphen, CostPoint, Oracle Applications.

Mrs. Fields

2005 – 2007

Internal Auditor

- Administered the implementation and testing of Sarbanes-Oxley 404, which entailed performing risk assessment, control rationalization, flowchart documentation, and control testing. Collaborated with third-party consultants, including Earnst & Young, Protiviti, and handled two direct reports. Technically used ACL
- Executed financial audits on profit and loss and balance sheet as well as audits on manufacturing and field operations; which covered revenue recognition, storage facility, expense reporting, accounts payable (AP) recovery, manufacturing, and facility utilization. Effectuated proper revenue recognition and collection by designing revenue compliance. Technically used Khalix, ACL.
- Developed an audit plan database; monitored and automated the yearly audit plan to observe high-risk audits.

J.C. Penney

2000 – 2005

Project Manager

2002 – 2005

- Spearheaded the implementation of Oracle Enterprise Resource Planning (ERP) for the Oracle Project Team, ensuring the functionality, format accuracy, data integrity and full support for the new system; produced procedure manuals and facilitated training for more than 600 staff across the shared service center. Technically used Toad, MYSQL, Oracle Applications, Cognos.

- Devised the Cosmetic Commission Payment System, which is an automated payables system rolled out across the Cosmetic Division. Technically used DB2 Platinum, Solomon, Peoplesoft, Access.

Area Manager

2000 – 2002

- Administrated the Inventory Support Department' inventory management update system, which was designed to track booked values of inventory adjustments, classify shrinkage, and ensure proper receipt of all 1084 J.C. Penney stores. Technically used DB2 Platinum, Access, SSMS.
- Thoroughly performed estimations and forecasting in support to inventory management as well as to various salon departments. Techically used DB2 Platinum, AS-400.
- Supervise approximately 25 to 30 employees, as well as receipt and settlement of third-party physical inventory counts against programmed inventory.
- Replaced the periodic inventory reporting system with Stock Ledger, a perpetual inventory system, enhancing the tracking of inventory procedures, such as receiving, book adjustments, and shrinkage.
- Instituted the risk assessment, control rationalization and documentation for Sarbanes-Oxley 404, which were implemented throughout the shared service center.

EDUCATION/CERTIFICATIONS

Utah State University

2003

B.S. in Accounting

International Institute of Auditors

2009

Certified Internal Auditor