www.linkedin.com/in/kylegoodfriend #In2Hyperion www.in2Hyperion.com 614.668.7324 Columbus, OH

Kyle Goodfriend

Hyperion Planning Certified Implementation Specialist
Essbase Sales Specialist | Planning Sales Specialist
Essbase Pre-Sales Specialist | Planning Pre-Sales Specialist
Oracle Cloud Services Specialist
Essbase Support Specialist | Planning Support Specialist
Microsoft Certified Professional

Oracle Hyperion Planning 11 Certified Implementation Specialist

ORACLE ACE

20 year history of successful Hyperion implementations with no failed projects

Recognized for my ability to lead projects and grow junior resources into powerful partners

Recognized as an industry export being published in the WSJ and Vision Magezine

Expert in all aspects of Hyperion Planning and Essbase

in2HYPERION

Creator and owner of www.In2Hyperion.com attracting over 20k visitors with over 3k followers through social media and email

HYPERION CUSTOMER COMMUNITY Columbus

Developed a customer community for Hyperion products where nearly 100 people attend semi-annual events to develop and share knowledge in Ohio

Summary

I am a senior manager with experience in all phases of the development life cycle. My expertise is in relational and multidimensional database design/implementation, as well as managing projects and developing talent. Managing projects and staff and serving as a key developer on projects in a variety of industries enables me to thrive in any situation. With my finance and accounting background, I communicate effectively with business and technical staff. My technical background originated when I performed accounting and financial management roles and found ways to use technology to make the business more productive and profitable.

I develop revenue opportunities, am the engagement manager on most projects, and develop and manage the project plan and project budget. As a senior resource, I dedicate time to developing internal talent, as well.

Leadership Roles

Solutions Architect

Web Designer

College Professor

Hyperion Developer

Sales Support

Project Manager

Career Mentoring

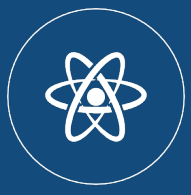
Graphic Designer

College Course Content Designer

Youth Coach

Industry Experience

Insurance



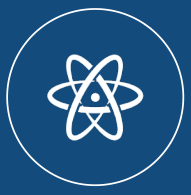
Science

Retail

Technology

Travel

Hospitality



Energy

Education

Entertainment

Financial Services

Food Services

Healthcare

Civil Engineering

Professional History

Huron Consulting Group (Formally ADI Strategies, Inc.) — 9/13 - Current

Senior Management Consultant (9/13 – present)

A client project list is attached

- Deliver webinars on advancements in technology and strategic uses to improve processes
- Manage multiple projects to assure quality standards
- Act as project manager and lead architect
- Work with sales and senior management to grow Midwest practice (develop SOWs, respond to RFPs, develop and present client presentations)
- Sponsor monthly meetings to develop common strategic practice with developers
- Developing mentoring program to ensure staff has the tools to succeed
- Assist marketing to create graphic collateral that aligns with corporate strategy (including print media, web design, and presentations)

Rolta International (Formally Whittman Hart Consulting, Formally TUSC) — 3/08 - 8/13

Senior Management Consultant (10/11 – 8/13)

A client project list is attached

- Managed mid to large Hyperion projects, ensuring successful delivery and transition of ownership to the client
- Filled role of technical lead and architect
- Developed talent by working with junior associates
- Developed and deliver SOWs to the client, focusing on
  - Technical architecture
  - Project plan
  - Financial budget
  - Resource Requirements
- Wrote marketing material, white papers, case studies, and training material
- Developed project management documents that are required for all Rolta projects

Management Consultant (8/10 – 9/11)

- Considered an Essbase and Planning expert, I am introduced to projects throughout all project life style stages to advise project teams about opportunities and best practices
- Developed and maintain www.In2Hyperion.com, a BLOG with professional articles and free tools that is viewed by more than 1 million people annually

Senior Consultant (3/08 – 7/10)

- Developed automated way to migrate Essbase environments, increasing productivity and accuracy

JPMorgan Chase & Company (Formally Bank One) — 8/96 - 3/08

Treasury Services, VP / Technical Manager (5/06- 3/08)

A client project list is attached

- Upgraded all cubes to ASO, automated outline build and data processing for all cubes
- Developed planning and forecasting system – migrating from OFA to Essbase
- Developed financial reporting system for WSS
- Developed financial reporting system for TSS with 5 years of historical data
- Developed regional reporting for 7 groups(cubes) in Europe and Asia
- Developed financial reporting system for TS

Corporate Administrative Systems, VP / LOB Deployment Manager (10/04- 5/06)

- Developed solutions for line of business reporting requirements
- Managed staff, tasks, and budget for project delivery

Corporate Administrative Systems, VP / Application Development Analyst - Manager (8/03 – 10/04)

- Finance Target Environment
  - Developed a Business Objects Universe for detailed analysis
  - Developed web reporting via Hyperion Application builder
  - Acted as finance expert on the development and optimization of the DB2 Star and ODS
- Commercial LOB Development Manager
  - Automated tasks (calculation, daily maintenance, data loads, server status) that are currently being performed by contractors
  - Optimized Essbase databases, memory usage, and calc scripts
  - Reduced calc times for direct expense cube from 3 hours to 2 minutes
  - Reduced calc times for revenue and balance sheet detail from 26 hours to 3 hours

Retail Financial Systems, VP / Manager of Financial Applications (4/02 – 8/03)

- Responsible for the production of over 20 financial and reporting applications, supporting over 3,000 users
- Managed the development plans of new applications
- Responsible for hiring, developing, and mentoring staff of 4
- Supported other technical teams in Retail by mentoring those who wanted to advance their technical skills
- Inventoried all unused computer related equipment owned by the Retail line of business
- Performed all new user training nation-wide
- Maintained all production applications with 25% of normal staff during department transition
- Completed the Bank One Management Development Program

Retail Financial Systems, AVP / Application Development Lead (2/99 - 4/02)

- Built branch reporting webs (Income Statements, Balance Sheets, AP information, T&E, FTE & Headcount) via ASP, JavaScript, HTML, DHTML, and AlphaBlox
- Built front ends for Essbase Maintenance using Visual Basic and the Essbase API
- Redesigned outlines, calc scripts, data preprocessing routines, and database optimization of several Essbase applications to improve performance using Partitioning
- Created and maintained SQL Server with all data preprocessing routines for Essbase and online reporting
- Maintained intranet site to communicate system changes, status, and goodwill
- Created all web design layouts, including customized graphics, for Retail line of business
- Developed query tool on Intranet for users to identify data maps from old system to new system using active server pages and IIS
- Redesigned and implemented new financial and analysis package using Essbase modeled after SAP structure. New system included changes in the outline, data sources, preprocessing, and training
- Used weekly user focus groups as decision making process for new system
- Managed the creation of Mapping OPR and SAP data into similar formats
- Created preprocessing application to convert mainframe data into readable file for Essbase using Visual Basic

National Retail Group, Planning and Analysis Manager (6/97 - 2/99)

- Created an Essbase application to house the 1999 budget. Financial Managers from Columbus, Tempe, and Phoenix used an Excel template to perform cost center budgets. Exports were performed from the templates and consolidated in Essbase. The entire system and process was created and tested in less than 30 days
- Coordinated financial forecasts and budgets for Consumer Lending ($15 billion in assets)
- Proposed process improvements to enhance information to regional managers through executive officers
- Automated and standardized all monthly reporting requirements for Consumer Lending. After the completion of the project, the monthly process was reduced from 9 to 3 days. This was completed by developing small VB applications and databases that eliminated manual and redundant tasks

National OPR Support, Financial Analyst II (8/96 - 6/97)

- Created an application that would display status and maintenance information for the corporate financial analysis application
- Created a backup utility primarily for laptop users that gave them the ability to select folders and files from anywhere on their PC and add them to groups
- Wrote an Access database that allocated $120 billion through the interaction of 3 financial systems used by 12 people in 5 states

Franklin University — 1/98- 1/03

Computer Science & Management Information Systems, Adjunct Faculty / Instructional Designer

- Maintained 98% student approval level
- Designed class material and evaluation methods for Comp 107, MS Access
- Facilitated CS 235 - Dynamic Application Development with Visual Basic
- Facilitated MIS 360 - Ecommerce (Advanced Web Design and Implementing Shopping Carts)
- Facilitated Computer Concepts 106, 107, and 108, covering topics in Excel, Access, PowerPoint, FrontPage, and Photoshop
- Facilitated Computer Concepts 105, covering topics in Word, Excel, Access, PowerPoint, Computer Ethics, and the Internet
- Built interactive web site for students to sign attendance sheets, take quizzes, and review examples and in-class exercises
- Built Q&A site with search capabilities to get questions answered quickly

Limited-Express, Inc. — 7/94- 8/96

MIS Customer Service Group (2/96 – 8/96)

- Taught Excel, Access, and Word to groups of 5 to 20
- Rewrote the MIS Customer Service Database to be faster, more efficient, and more applicable to customer problems
- Created an Access database for the finance department to store and create journal entries, which could be approved by management and uploaded to the general ledger without any associate intervention, eliminating keying errors and mis-posted entries

Credit Card Accountant (10/95 - 2/96)

- Created an Access database that held all information relative to credit card purchases for nearly 750 stores
- Decreased credit card charge backs by 75%, saving $200,000, which will continue annually
- Decreased the time it takes to balance credit card receivables, payables, and fraud from 70 hours to 35 hours

Store Analyst (3/95 - 10/95)

- Created Access databases to automate manual tasks and produce weekly and monthly analysis and reporting of store expenses
- Created an Access database to track and control nearly 750 store's register funds

Store Auditor (7/94 - 3/95)

- Automated analysis and reporting of store deposit discrepancies using Access
- Wrote monthly articles for an internal publication issued to all associates to better relations between Sales Audit and other departments

Education

University of Cincinnati, BBA, Finance **9/89 - 3/94**
Cincinnati, Ohio
u.c. offers an alternating quarters co-op educational program which integrates course work and job experience
- I maintained a 3.2 Accumulative G.P.A. and a 3.6 Finance G.P.A.
- Junior Achievement: Instructed grade school children regarding business basics
- College of Business Administration's Tribunal
- Dean's List 1990, 1993, 1994
- AT&T Investment Challenge: Increased my portfolio worth by 44% in the first month of active trading
- Received the Business Scholarship Award from the Service Corps of Retired Executives, Cincinnati #34

Memberships ▪ Community Involvement

- Member of Golden Endings, Golden Retriever Rescue – foster homeless and abused pets
- Coach youth ice hockey – USA Hockey Certified Coach
- Volunteer for local schools
- Coached youth soccer
- Held position on the Board of Directors, Columbus Childrens' Choir
- Maintained CubeTools.com - designed, wrote, and distributed free Essbase administrative tools to improve the weaknesses of current Essbase supported tools. Over 1,000 companies downloaded one or more of 5 applications

Affiliations ▪ Certifications

- Oracle Ace Associate
- Oracle Hyperion Planning 11 Certified Implementation Specialist
- Essbase & Planning Sales Specialist
- Essbase & Planning Pre-Sales Specialist
- Essbase & Planning Support Specialist
- Participated on the Customer Advisory Board, Hyperion Essbase
- Member of Greater Ohio Hyperion User Group
- MS Microsoft Certified Professional ▪ Excel ▪ FrontPage ▪ Access

Oracle Community Involvement

- Authored 3 areas of for the Oracle ePBCS/PBCS certification exam
- Columbus Hyperion Customer Community
  - Created and branded customer group
  - Increased attendance from 20 to 75 in 6 months
  - Design all collateral, print material, website, social media, and presentation templates
  - Develop meeting agendas, find and select speakers and organize all aspects of the event
- Ohio Valley Oracle User Group
  - '17 Speaker - Supercharge PBCS with Microsoft PowerShell
  - '10 Speaker - Maximizing Essbase Maxl
- Oracle Applications Users Group, Vision Magazine
  - Spring '12 edition, cover story –Driving Accountability Through Disciplined Planning with Hyperion Planning
- Kaleidoscope
  - '18 Panalist - Ask the Experts - Planning
  - '18 Speaker - Bottom-Up Planning at Breakthru Beverage Group
  - '18 Speaker - Why Groovy is Game Changing
  - '18 Speaker - Last Minute ODTUG Kscope18 Planning Souvenirs You Will ACTUALLY Use!
  - '13 Hyperion Planning Content Lead
  - '13 Speaker - Automating Hyperion Planning Tasks
  - '13 Panelist - Ask The Planning Expert
  - '12 Speaker - Create Unlimited Custom Spreads for Driver Based Planning
  - '12 Abstract Review Committee
- Collaborate – Independent Oracle Users Group
  - '11 Speaker – Driving Accountability Through Disciplined Planning at Abercrombie & Fitch
- International Hyperion Solutions Conference
  - '01 Speaker – Replace SAP reporting at Bank One with Hyperion Essbase
  - '02 Speaker – Deploying a global budgeting system at Bank One with AlphaBlox

Technical Overview

- Development Languages: Visual Basic, ASP, ASP.NET, VB.NET, JavaScript, VBA, JAVA, Visual Studio, PowerShell, Groovy
- Databases: SQL Server, DB2, Oracle
- Hyperion/System11: Essbase (BSO/ASO), Shared Services, Hyperion Reports, EssCmd, Maxl, API, Integration Services, CSS Import, Planning
- PBCS: EPM Automate
- OS: Windows/NT, Windows, Windows Server Enterprise, Windows Server Web Edition, UNIX, MAC
- OS Scripting: VBScript, DOS, Powershell, Korn Shell
- Graphic/Print Design: Photoshop, InDesign, Publisher
- Web: IIS, HTML, DHTML, VB Scripting, .NET, ASP, AJAX, Visual Studio
- Reporting: AlphaBlox, Business Objects, Crystal Reports
- Office: Word, Outlook, Access, Excel, Project, OneNote, PowerPoint, FrontPage
- Other: SAP, FTP, VISIO, Apple Scripting

Company History

SHILOH

The Walt Disney Company

Nationwide

CONTECH ENGINEERED SOLUTIONS

Omnicare

CLIFFS

Connec+Wise

PNC

scrippsnetworks interactive

HGTV diy network HGTV FRONT DOOR HGTV Remodels HGTV magazine

USAA

Bath & Body Works

VICTORIA'S SECRET

HYLAND SOFTWARE

Limitedbrands

DSW DESIGNER SHOE WAREHOUSE

UNITED

National City

M&T Bank

GCA SERVICES GROUP

Abercrombie & Fitch

FRANKLIN UNIVERSITY

BANK ONE

EXPRESS

CHASE

FannieMae

Northern Trust

Santander

BURGER KING

William Blair

BREAKTHRU BEVERAGE GROUP

BERKSHIRE HATHAWAY ENERGY

CONSULTING PROJECT SUMMARY

PBCS (BSO/ASO)
EPM Automate
PowerShell
Data Management
Workforce Module
Groovy Calculations

Breakthru Beverage Group, (Chicago, IL) – Corporate Planning (PBCS)

Breakthru Beverage Group is a family owned business representing wine, spirit and beer brands located through the country and in Canada. After the most recent acquisition, the need for a financial planning and reporting application that produced faster results and could react to constantly changing needs was required. BBG budgets and forecasts at a product level by distribution channel and a segment called material group.

We had 5 months to develop an integrated application with SAP that included P&L, operating expense, gross profit, and workforce applications. The operating expense application included driver logic by account/cost center/company for all operating expenses. Users needed to be able to enter an annual amount or a growth factor and spread it by one of six key metrics. The gross profit application included a very complex seeding process by product, delivery channel, and material group. Users were able to update any level of cost center, delivery channel, and material group by changing the price, case growth, and/or gross profit, and it would be allocated to bottom of all three dimensions. Users were also able to phase the results at any level, by month, and have those changes allocate to bottom of the same dimensions. This changes had to be real time with the P&L, and Groovy was used to make this possible. Data was effectively consolidated in all dimensions and moved at the company level within a second. The workforce application was the most complex model I have ever been involved in, and gave users the ability to load rates at consolidated levels and budget people by union, cost center, company, and job function. Each employee was then allocated to multiple company/cost center combinations. All the applications were multi-currency, and synchronized with SAP multiple times a day.

All this was finished in a compressed timeframe, and Groovy calculations were used to accomplish things that would not have been feasible otherwise. Updates to the GP application, on form save, were moved at a consolidated level in less than a second, so full P&L reports were updated in real time.

PBCS (BSO/ASO)
EPM Automate
PowerShell
Data Management

Shiloh Industries, (Cleveland, OH) – European Planning (PBCS)

Shiloh Industries acquired a European steel company 3 years in 2013. Due to the success we had with the corporate implementation 2 years ago, we were selected to develop a solution for the European entity. The project started late and the timeline was extremely aggressive. The project was delivered on time, below budget, and more functionality was produced than in the original SOW.

This multi-currency application included contractual level information to produce a 5-year forecast based on customer level properties, including discount rates based on the length of the contract. All contractual information was entered in the customer currency and converted to local currency. Price and rate information was loaded from the vendor system with the option to override this information when necessary, to reduce the effort to maintain this level of information.

Driver-based logic was introduced to support a large portion of the expenses (COGS, Salary, Interest) with input on the remaining items. A basic balance sheet with intercompany eliminations and cash flow were also developed. Reporting applications were developed to produce real time consolidations when data was entered and calculated.

All automation was created using PowerShell and EPM Automate, including backup archives, data loads, calculations, data movement, and email communication.

We were extended to produce and deliver training, develop user documentation, and support the post go-live timeline.

Essbase System 11.2.3.5 (BSO/ASO)
Hyperion Planning
Essbase
EPMA
Calc Manager
Data Synchronization
Hyperion Financial Reports
Shared Services
Life Cycle Management
Data Sync
MaxL
Power Shell
VBS

Santander Bank, (Wyomissing, PA) – Hyperion Planning & Reporting

During our involvement with the PBCS application development, there was a need to evaluate 2 existing applications and provide a strategic direction to improve performance and heavy manual intervention as there was no automation. Processing times were near 24 hours.

During the engagement, our team converted the reporting application to ASO and rewrote the allocation with procedural calculations. We also rewrote the integration that existed in Data Synchronization with FDMEE. Although I supported all development aspects, I was focused on improving the Planning application. This effort included several work streams. First, PowerShell was used to alter existing files to manage metadata loads and format data files to load efficiently. Over 30 metadata files existed for 3 dimensions. Using PowerShell, these files were queried and altered to produce a file for each dimension load. This was all a manual effort prior to this enhancement. The second work stream included changing the database configuration and rewriting all the calculations to account for the change. This included fixing issues with block creation, reducing the number of times calculations passed through blocks, and updating the logic so calculations could be run multiple times without reloading the data.

Metadata and data loading was completely automated, calculations were reduced by a factor of 5, and lengthy reporting requests were reduced from 10+ minutes to around 30 seconds.

PBCS (BSO/ASO)
EPM Automate
PowerShell
Data Management

Santander Bank, (Boston, MA) – Hyperion Planning (PBCS)

Santander Bank is a large conglomeration of banking entities (Bank, Consumer Lending, USA consolidated, etc.) that had 3 months to setup an environment and build a consolidated application to receive budget and strategic plan from all the lines of business. A solution that would accept user input, apply some driver based logic, hold historical data, and be able to report consolidated results along with variances, was required to produce and analyze USA entity results that could be communicated to its Spanish equity holder.

In 12 weeks, our team was able to build the application to achieve Santander's goals. The solution included implementing FDMEE to import actuals from HFM and map that data to planning levels of entity and product and provide a historical launch point for the strategic plan. Web forms to accept user input, business rules applied standard logic, including Interest income/expense and fees, Smart View and Hyperion Financial reports were available to get quick results, and security limited the appropriate people to have access to the appropriate portion of the financials. Administrative and user training was developed and delivered, and we provided open educational opportunities to support the entry, validation, and finalization of the strategic plan.

PBCS
EPM Automate
PowerShell
FDMEE
SSO

GCA Services, (Cleveland, OH) – Hyperion Planning & Reporting (PBCS)

GCA Services is the leading national provider in facility services with over 37,000 employees. They provide services to in 46 states and Puerto Rico to schools, colleges, bio-chemical labs, nuclear power facilities, rental car agencies, and corporate offices. GCA was experiencing growth and had the need to take their spreadsheet methodology for budgeting and enhance it in an enterprise class solution by providing quicker consolidations and more reporting and analysis options.

A full P&L, Balance Sheet, and Cash Flow model was developed. This was supported by a daily employee metrics model and an efficiency analytical model to drive profitability. This has provided significant benefits as they can now see consolidated results in seconds with consistent driver logic and corporate standard metric terminology.

	These 3 models are fully automated with EPM Automate. With PowerShell, we were able to update all the server variables based on the date, so calculations and reports generated variances for current and prior day, current and prior week, and current and prior month with no manual intervention. Standard hierarchies were imported from PeopleSoft while alternate hierarchies were maintained in Planning and sourced PeopleSoft every night. 3 data sources (PeopleSoft, Payroll, and Clean) were effectively mapped to custom hierarchies with FDMEE and all 3 modules were refreshed daily.
Hyperion Planning Cloud Services	**ConnectWise, (Tampa Bay, FL) – Hyperion Planning (PBCS)** ConnectWise, located in Tampa, FL, is a management solutions provider, specializing in providing IT help desk, CRM, billing, project management, and similar solutions to organizations that don't have dedicated internal resources. ConnectWise completed all their budgeting, forecasting, and financial reporting in a large network of connected spreadsheets. Unable to support the company growth and increasing requests for financial analysis and more frequent and reliable forecasts, they looked to PBCS to solve the issue. Within 3 months, a fully functional multi-currency application was delivered for forecasting out 3 years. The revenue model included driver based logic to calculate licensing, assurance and SAAS modeling, perpetual revenue and expenses based on contract terms and renewal rates, including ramp up modeling. We developed a matrix based allocation model to reduce manual data entry. We also created a driver based T&E model, as well as predictive training costs. We developed a workforce model to allocate expenses by employees in the US, UK, and Australia. New hires, transfers, and employee terminations were also included.
Hyperion 11.1.2.4 Hyperion Planning (Balance Sheet Planning)	**USAA, (San Antonio, TX) – Hyperion Balance Sheet Planning** Summary available upon request
Essbase System 11.2.3 (BSO) Hyperion Planning (Workforce Planning CapEx Planning) EPMA Calc Manager Data Synchronization Hyperion Financial Reports Shared Services Life Cycle Management Data Sync MaxL Power Shell	**Shiloh Industries, (Cleveland, OH) – Hyperion Planning & Reporting** Shiloh Industries is a major steel production facility with entities through the US, and recent acquisitions in Europe and Mexico. Using old technologies to close their financials and spreadsheets to product the budget, they purchased Hyperion. Due to the other job responsibilities, I was responsible for managing the project, including Shiloh resources, and making sure all aspects of the project were successful. Through multiple phases and extensions to make enhancements, we successfully implemented a custom model for CapEx, Workforce, project level revenue and cost of materials, and IS/BS/CF. The CapEx model calculated depreciation, asset value, as well as manage the cash flow of all assets. This enabled leadership to see lost savings due to assets implemented late and the monitoring of assets implemented over multiple years. The revenue/COM model took industry data and merged it with product level adjusted values to calculate both the revenue and cost of production. As the industry data was updated and loaded, forecasts were automatically adjusted. Workforce was done at a job function level and calculated all salary and benefits based on whether the job was union, salary/hourly, direct/indirect/SGA, and based in Europe/US/Mexico. Global defaults were loaded to minimize the effort of budgeting at a job level, with the ability to override these defaults on a case by case basis. All these modules were integrated with the IS/BS/CF model where all the expenses other than COM were entered. The balance sheet and cash flow were calculated and eliminations on the income statement were performed to mirror those in HFM. USD was calculated on all non USD members in all models. Reports in all modules were created using HFR and Smart View.

	I developed all the user training, including quick start guides, user references, and presentations, and delivered training to all users. It was conducted locally, as well as internationally.
Essbase System 11.2.2 (BSO/ASO) Hyperion Planning (Workforce Planning CapEx Planning) EPMA Calc Manager Hyperion Financial Reports Shared Services Life Cycle Management Data Sync MaxL	**OmniCare, (Cincinnati, OH) – Hyperion Planning & Reporting** Our team developed four models, each provided discrete functionality to Omnicare related to its budget and forecast processes. Capex, RXC, Vangard/ODC, and Reporting applications were delivered. I was focused on managing the project plan, documentation, mentoring two junior resources, and owned the development of the reporting application, including a fully calculated balance sheet and cash flow statement.
Essbase System 11.2.2 (BSO) Hyperion Planning (Workforce Planning CapEx Planning) EPMA Calc Manager Hyperion Financial Reports Shared Services Life Cycle Management DRM JAVA	**M&T Bank, (Buffalo, NY) – Hyperion Planning & Reporting** M&T Bank was developing a balance sheet planning application to walk forward new and existing book balances on all loan and deposit projects. We built Custom Defined Functions to accept balances and current rates, and return 2 years of blended balances, rates, and IS related data. The IS model was driver based and enables users to load drivers at any level of the entity structure. The calculations would iterate through the ancestors until a rate was located and applied. This was accomplished without loading data to parent level members. Although my focus was on the balance sheet, income statement, and cash flow, I developed all the integration and automation, and was responsible for the oversight of the capex and workforce models.
Essbase System 11.2.1 (BSO) Hyperion Planning (Workforce Planning) EPMA Calc Manager Data Sync Hyperion Financial Reports Shared Services Life Cycle Management UNIX Scripting	**Northern Trust, (Chicago, IL) – Hyperion Planning & Reporting** We implemented a robust, enterprise-wide financial planning and forecasting solution using Oracle's Hyperion Planning to overcome issues with their previous planning system (Cognos). The new system provided a balance sheet, income statement, revenue allocation, and detailed staff planning capabilities at the legal entity, geographic and line of business levels. It also overcame issues Northern Trust had experienced with their prior planning system's performance (e.g., daily consolidations previously took over 8 hours to complete), scalability, integration with PeopleSoft EPM, dimension member limitations, and the ability to support multi-year planning. Solution also included extensive automation of hierarchy updates, data exchange, system processing and maintenance procedures in a mixed Windows/Linux environment.

Maxl Batch Utilities Windows Scripting	
Essbase System 11.1.3 (BSO) Hyperion Planning (Workforce Planning) EPMA Calc Manager Hyperion Financial Reports Shared Services Life Cycle Management .NET (Windows Services) Windows Scripting	**Scripps Networks, (Knoxville, TN) – Hyperion Planning & Reporting** Scripps Networks owns and operates HGTV, DIY, Food Network, Cooking Channel, Great American Country, and several online retailers, including ShopZilla. Scripps Networks implemented a planning and workforce application that enabled them to drive accountability and included a sophisticated allocation process that created full cost center level income statements that matched revenue with expenses. Many private investors required more detailed explanations on the costs that were applied to their returns to appropriately explain ROI. Driver based planning was introduced to many processes to drive accountability and consistency.
Essbase System 11.1.3 (ASO)	**United Airlines (Chicago, IL) – Hyperion Planning** United Airlines sent 3 of their staff members to Essbase training to develop multiple ASO and BSO applications. After 3 months of implementation, the need for further education, specific to their development activities, was required to complete the projects. I spent two weeks with the team in group settings and one-on-one sessions to further advance their skills and ensure the development path would meet the requirements.
Essbase System 11.1.3 (BSO) Hyperion Planning (Classic) Hyperion Financial Reports Shared Services Life Cycle Management .NET (Windows Services) Windows Scripting	**Victoria's Secret Catalogue, (Columbus, OH) – Hyperion Planning & Reporting** Victoria's Secret Catalogue had an existing implementation that was partially utilized, but never completed. As the Project Manager and Hyperion Architect, I was responsible for delivering a usable system and mentoring junior level associates. We worked with the store payroll finance group to add a dimension to the application to provide a level of detail never before available. Working with the ETL group, we built an automated extract and weekly load process. This process dynamically extracted the week from the load file, updated the substitution variables, and loaded the data to the correct intersection of members. The application also enabled them to produce multiple versions of a budget and forecast, clear selected data points when necessary, and added global variables to reduce the business rules by 80%. Overcoming the challenge of employees not completely understanding the tools they had at their disposal and spending time to train them how to use Hyperion products was critical to the success of the project. With Financial Reporting and the Excel Add-In, the store payroll group was able to budget, forecast, and report at a level they had never before been able to in the history of the company. In all, 5 training guides were developed, 2 user administration guides were delivered, and 2 design documents were designed, ensuring a successful handoff to the responsible support parties.
Essbase System 11.1.3 (BSO) Hyperion Planning (Classic) Hyperion Financial Reports	**The Limited – Global Services & Logistics, (Reynoldsburg, OH) – Hyperion Planning & Reporting** Limited Global Services & Logistics is the division of The Limited that is responsible for making all the products that are sold, as well as transferring them from international locations to the United States. The division recently consolidated three businesses, all having their own budgeting process, chart of accounts, and product nomenclature. As the Planning architect, I was responsible for working with the three groups; fostering communication to decide on common hierarchies and processes, as well as ensure the design of the Hyperion

Shared Services Life Cycle Management .NET (Windows Services) Windows Scripting	Planning application that supported all three groups and met the reporting and performance requirements. The hierarchies were created in excel, so VBA had to be utilized to ensure that all the Essbase rules were adhered to, and a load file was built from it to import into Hyperion Planning through the outline load utility. Extensive documentation was delivered to ensure a successful handoff to the support center. We worked closely with the training partner to provide training to all levels of users (domestic and international) and administrators.
Essbase System 11.1.3 (BSO) Hyperion Planning (Classic) Custom Form JavaScript Shared Services Life Cycle Management .NET (Windows Services) Windows Scripting	**Abercrombie & Fitch, (New Albany, OH) – Hyperion Planning & Reporting** Abercrombie's budgeting and forecasting process, including over 1,000 stores, was done in hundreds of spreadsheets. Reacting to changes, whether it was reporting requirements or currency rates, was difficult. Leading a project team and filling the lead Planning architect role, I was responsible for designing a planning system that would enable Abercrombie to be proactive, rather than reactive, when planning and forecasting the business. Working closely with the financial and technical teams, we created a plan to maximize the impact we made by determining the functions that would create an effective planning process. Our team installed a development and production environment and created an outline that would support not only the reporting requirements, but added hundreds of driver-based planning points. Payroll, travel, and many other functions are now budgeted based on volumes and drivers. With more than 50 web forms and 3 plan types, the result was a driver-based planning application that adapts with the changes that occur in a demanding industry. Our team compiled process playbooks, administrator guides, and detailed documentation for managing hierarchies, business rules, and automation to ensure a successful transition.
Essbase System 9.3.1 (BSO) Hyperion Planning (Classic)	**United Airlines (Chicago, IL) – Hyperion Planning** United Airlines used a corporate budget and forecasting application. It was also used for reporting general ledger data. The application needed to be converted to handle over 120 currencies. I worked with existing staff to change the dimensionality and added business logic to calculate GL source and input data from the source currency to USD.
Essbase System 9.3.1 (BSO) Hyperion Planning (Classic)	**Cliffs (Cleveland, OH) – Hyperion Planning** Cleveland Cliffs is a mining company with mines all over the Mid-West. The existing application to forecast and plan expenses related to coal was having performance problems. Nearly 100 business rules and more than 75 forms were analyzed. We developed a plan to alter every business rule to function more appropriately and efficiently. When complete, the application could handle a budget and forecast for multiple years during the same period. The speed and flexibility gained provided the necessary improvements to meet the needs of the users.
Essbase System 9.3.1 (BSO) Hyperion Planning (Classic) Custom Form JavaScript Shared Services .NET VBA Windows Scripting	**Fannie Mae (Washington D.C.) – Hyperion Planning** Fannie Mae was in need of revamping the Guaranteed Fees forecasting and planning process. The existing application was designed prior to the economic challenges Fannie Mae faced in 2009. The application was somewhat of a black box in that the business logic used was developed by leadership that no longer existed. The logic used was somewhat hidden and difficult to understand by the new leadership and users. The business requirements presented a number of challenges. Product rates were entered at high levels, balances where loaded at a higher level of detail than was needed to produce an accurate forecast, and the balances depreciated over 5 years. There was a high volume of allocations and depreciation logic. We ensured that no matter what combination of information was entered, the correct data was allocated and depreciated. The

appropriate blocks were only created if necessary so the size of the database did not explode, decreasing performance.

Working closely with the technical and business teams, we developed a strategy to make the logic more understandable. Detailed design documents were created so the existing technical staff could easily identify what and where business rules existed and could easily be altered as the business requirements changed.

Essbase System 11.1.1.2 (BSO)
Planning
Shared Services
EPMA
Maxl
.NET
VB for Applications
Excel Custom Functions
SmartView
SmartView API (VBA)
Windows Scripting

Hyland Software, Inc. (Cleveland, OH) – Hyperion Planning and Reporting

Hyland Software was a small, family owned business that developed, maintains, and sells a document scanning and management software called OnBase. Over the last several years, the organization has grown from 200 to 900 employees and was actively seeking acquisitions. The existing reporting process was extremely manual and could not react to changes in management structures or economic conditions. No forecasting process existed because of the level of effort involved in updating hundreds of linked spreadsheets. Acting as the project manager and technical lead, I was responsible for building a planning and reporting system that would lead the organization into the next phase of their growth. I worked closely with the finance organization, as well as the directors of the functional areas who would be building the budget. A business plan to develop a planning system was created to support the growth that was expected. After helping the management and ownership decide on the key metrics that would define an effective planning system, I managed all aspects of the design and implementation.

While developing the project plan, I worked with the information technology group to have our team install Hyperion System 11. After the Hyperion environment was stable, we worked with the business to develop hierarchies that would support the reporting requirements. Once solidified, our team built the Hyperion Planning application, comprised of 13 dimensions, 15 web forms with business rules attached, Excel VBA reporting, Hyperion Reports, and optimized the Essbase application. The application included modules for allocating expenses, rate dependent capital expense management, salaries and benefits, bonus allocation based on EBITDA, and allowed for input and reporting in multiple currencies. The execution speed of the business logic and consolidation took less than 5 minutes.

Because of the importance of this implementation and lack of technical expertise of the existing staff, an extremely detailed design document was developed. This document included details surrounding the system installation and hardware requirements, the business requirements, development timelines, and over 70 pages of knowledge transfer and step by step procedures to ensure successful production cycles and system stability.

Essbase System 9.3.1 (ASO & BSO)
Maxl
Shared Services
.NET
IIS
Java
ASP
VB for Applications
Excel Custom Functions

National City Corporation (Cleveland, OH) – Process Improvement

Countless hours are spent managing the results of the scripted Essbase processes. To eliminate the need for this effort, I developed a standard framework of Maxl scripts to change the way the group manages the production processes. I designed this framework to be so dynamic that all log files, error files, and scripts could be replicated with minimal effort. A web portal integrates with them to show the results of all production processes in one location.

Managing many of the dimensions was a manual effort and any member change had to be replicated in all applications. Applications with the same hierarchy had different formulas, aliases, and many times, member names. Customers were often questioning data accuracy due to these discrepancies. To create common dimension builds, I wrote a java application that exports members with all member properties from existing outlines. This export puts the member information in a tab delimited text file and removes all non- standard characters that cause load errors. Non- standard characters are replaced with comments. Properties and formulas are easily read. When a member change is required, it is done in one place and all applications that use the standard hierarchy reference the same dimension build file, and there is now consistency throughout the 100+ applications they maintain.

After moving two of the most time-intensive applications to this framework, I developed a website with the .NET framework that is used to communicate application status to both users and administrators. The state (failed, successful with data rejects, successful without data rejects, or processing) and execution time of the dimension builds, data loads, and calculations is now in one location. Production problems for all the applications are now identified in seconds. The website links to six Essbase servers and reports the status of over 100 Essbase applications.

This effort resulted in the elimination of 30+ hours of work every week for the team. NCB now has a common approach to every database they maintain. There is consistency in hierarchies, redundant tasks are eliminated, and communication and current status of the environment is completely automated.

The project was completed under budget, which allowed me to focus on additional enhancements. Managing over 3,200 variables on four servers in over 100 applications proved to be extremely time-intensive and error prone. I built an Excel workbook to manage all server variables. More than 99% of the variables are updated monthly and can be maintained by changing less than five cells. The process generated a Maxl script for each application that required variable updates. This script is included in the application build process, so anytime the outlines or data loads are updated, the appropriate server variables are current. Managing this process now takes minutes and virtually eliminates the possibility of errors. The custom functions are all dynamic, so adding new variables or applications means simply entering a new row in the spreadsheet. Anyone who can enter data in Excel can maintain this process.

Essbase System 9.3.1 (ASO & BSO)
Maxl
Shared Services
.NET

Contech (Cincinnati, OH) – Understanding Aging Receivables

With a growing business and a tough economy, Contech had a requirement to manage aging receivables and payables more efficiently. Pulling data from a repository, daily and weekly databases for both receivables and payables was designed. With no Essbase expertise, management wanted as much automated as possible. Working with existing staff, I developed .NET applications to dynamically update server variables and build Maxl that could be executed to maintain daily, weekly, and yearly variables. With no staff to actively monitor logs and Maxl results, I created another .NET console application to send emails. The Maxl scripts were completely rewritten with error trapping and utilized the email application to notify key management of issues related to the Essbase outline builds, data loads, and rejected records. This enabled the process to be completely hands off and ensure success without any effort to monitor processes.

Essbase 7.5.1 (ASO & BSO)
Essbase System 9.3.1 (ASO & BSO)
Maxl
EssCmd
.NET 2005
Essbase
Shared Services
Hyperion Reports
CSS Import/Export

National City Bank (Cleveland, OH) – System 9 Conversion

With 6 Essbase servers totaling more than 120 databases and 2 Hyperion Reports servers with more than 1800 reports, National City needed help upgrading their environment to System 9. As the lead on the Essbase migration, I built .NET tools to assist the migration. The .NET application builds scripts to create all applications and application settings, databases and database settings, server/applications/database variables, filters and partitions. Much of the existing settings had to be changed to be compatible with System 9. The syntax of filters changed in System 9 and had to be accounted for. Files were generated from the Essbase security to be used with CSS Import tool so all users, groups, and calc permissions could be easily imported into Shared Services. Maxl was also generated to create groups with filters and groups with calculation privileges, in Essbase. I updated all Maxl and EssCmd scripts to account for the new servers, changing all variables that were related to the previous servers. This entire process was migrated from 4 production servers to 2 test servers. After the test was complete, they were migrated again to the 4 new production servers.

Having an automated routine to manage these tasks reduced the effort by hundreds of hours, eliminated the opportunity for human error, and was critical in the success of the migration to System 9.

I developed training programs to administer Shared Services, partitioning, and CSS Import tool. A custom Excel toolbar was created to improve user experiences when interacting with the vast number of cubes. Functions included a quick connect with more descriptive explanations of cubes, zoom in functions at different levels, toggle mouse operations, a lock and send operation, retrieve all selected worksheets, and 10 more user functions were developed.

Essbase 7.5.1 (ASO & BSO)
Maxl
Perl
Windows 2003
UNIX

National City Bank (Cleveland, OH) – Monthly Loan Project

As a result of market volatility, constantly changing management requests for data, and a larger than ever need to understand high risk customers, National City required an Essbase cube with more than 30 dimensions. Managing almost 40 sources for dimension builds and almost 20 sources of data, I designed a process to meet the client expectations. After automating the extracts and identifying all the metadata requirements, I designed Maxl scripts to completely rebuild the outline every month and load all relevant data. More than 50 load rules were built so that monthly maintenance would never be required. I designed Perl scripts to rename all data files to reflect the period they represent so no maintenance has to be conducted on load rules or Maxl scripts.

Essbase 7.5.1 (ASO & BSO)
Maxl
Perl
Windows 2003

National City Bank (Cleveland, OH) – Daily Deposit Project

The initial project was to copy an existing weekly process to a daily process. This included 6 unique databases. I made a proposal to rewrite the process so that it would be completely self-maintained and the duplication of data would be minimized. Working with the ETL group to get the appropriate data feeds, I created a daily process that will only need maintenance one time every year. Every day, the outline is completely rebuilt and includes all relevant outline changes – all based on the data. The most recent 10 days of data, the most recent 10 weeks of data, and the most recent 2 month end data points are loaded. The original 6 cubes were consolidated to 2 cubes. The existing client staff was educated on the concepts of having the process maintained without human interaction.