

OneStream Consultant / Silver Partner – Robin Morash, CPA, CGA

www.epmcpa.com®

EPM / CPM EXPERIENCE (29 Years)

- OneStream EPM consulting: 8 Years
<https://onestream.com/partners/epmcpa/>
- Hyperion & Cognos EPM consulting: 6 Years
- Fortune 500 EPM systems management: 10 Years
- Cognos EPM / BI technical support: 5 Years

ONESTREAM EXPERIENCE (8 years)

- OneStream full-stack application developer:
 - Front end – OneStream end user dashboards
 - Back end – OneStream VB.Net business rules
<https://epmcpa.com/demos>
- 16 OneStream customer projects
- OneStream dashboards (*OneStream BI Designer, BI Viewer / DevExpress reports*)
 - BI report books, charts & scorecards
<https://epmcpa.com/bi-reports>
 - Intercompany matching & journal entry reports
<https://epmcpa.com/accounting>
 - Operational Dashboards: Daily SQL data blended with summarized Cube View data.
- Two Account Reconciliation Manager Implementations
 - Preparer / Approver Dashboard Scorecard charts
<https://epmcpa.com/dashboards>
- Two OneStream Guided Reporting Implementations
- OneStream Planning workflow dashboards with Data Management custom calculate business rule buttons.
- OneStream book report dashboards
- OneStream data integration: JD Edwards, MS Dynamics, Oracle EBS and SQL data warehouse(s)

SIGNIFICANT ACCOMPLISHMENTS

- Redshift daily data in cube view dashboard reports.
- OneStream embedded parameter dashboards.
- OneStream Studio / Designer board book BI reports.
- OneStream Oracle EBS sales order line-item detail
- Fortune 500 Financial Systems Manager for 120 month-end closes, 40 re-forecasts & 10 annual budgets.
- Designed & implemented a SOX compliant Journal Entry web application: SQL Server / JDE integration.
- Implemented Hyperion Planning for financial consolidation with Intercompany Eliminations.
- Five Fortune 500 Cognos EPM implementations.
- Cognos 1998 & 2001 MVP Award – Highest customer satisfaction rating & highest billable utilization.

Areas of Expertise

- OneStream XF Consolidation
- OneStream Dashboards
- OneStream Business Rules
- OneStream Designer / Studio
- OneStream BI Viewer
- OneStream Guided Reporting
- OneStream Account Reconciliation Manager
- Oracle / Hyperion Essbase
- Oracle / Hyperion Planning
- IBM / Cognos Consolidation
- IBM / Cognos Report Studio

Professional Training

- OneStream Boot Camp / Systems Administration I
- OneStream Rules II
- OneStream Report Studio II
- Cognos Report Studio
- Hyperion Boot Camp
- Hyperion Planning
- Hyperion System Admin
- Hyperion BSO Database
- Hyperion ASO Database
- Hyperion Calc Manager
- Hyperion Data Management
- Hyperion Installation
- Hyperion SmartView

Industry Experience

- Chemical
- Engineering
- Entertainment
- Home Building
- Insurance
- Manufacturing
- Pharmaceutical

Contact information

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PROFESSIONAL EXPERIENCE

INDEPENDENT CONSULTANT, [EPMCPA LLC](#)

2014 –

One System Solutions – Financials, Planning, BI Reporting & Account Reconciliation

- OneStream Operational Dashboards – Transactional SQL blended with Cube View data.
- OneStream Designer (Studio) Board Book Reports
- Legal Entity Consolidation / Intercompany Eliminations & Matching Reports
- Foreign Currency Translations, CTA & USD Override
- Financial Modelling / Rolling Forecasts custom calculate Finance Business Rules
- Dashboard Extender Business Rules
- Drill Down to Transactions
- SOX Compliant Topside Journal Entry Deployments
- OneStream Workflow Collaboration

SENIOR BUSINESS SYSTEMS MANAGER, [Fortune 500 McDermott / CB&I / Shaw](#)

2004 – 2014

Financial Close Improvements – Reduce Risk, Time & Effort to Close-the-Books

- Financial Reporting, Consolidation, Planning & Analysis – JDE GL Account Balances
- Enterprise Implementation – 4,000 Accounts, 5,000 Entities, 3,000 Projects ...
- Migrated Hyperion Financial Management to Cognos
- Migrated Cognos Fiscal Year to Calendar Year
- Migrated Cognos to Hyperion Planning
- Financial Consolidation without HFM – Hyperion Planning Intercompany Eliminations
- Automated Essbase Calculation Scripts & MAXL Routines
- Hyperion Essbase SQL Data Load from Oracle Data Warehouse

Better Analysis – Fewer Reports – Reduce Time & Effort to Consume Information

- Hyperion Web Grids – Self-Serve Reporting – Select Members / Pivot / Drill / Zoom
- Hyperion Dashboard Web Forms – Data Input / Tabs / Charts / Trend & Variance
- Business Intelligence – Financial & Operational Reporting (*MDX & SQL*)
- Retired Multiple Legacy Reports with a Single Dynamic BI Report
- Print-Ready / Interactive Dashboards / Drill-Down / User Friendly Report Packages

CONSULTING MANAGER / TECHNICAL SUPPORT TEAM LEAD, [IBM / Cognos](#)

1995 – 2004

Financial Consolidation, Planning & Analysis / BI Technical Support

- Five Fortune 500 clients
- EPM / BI Software SME
- ETL Data Modelling (SQL extract, transform and load)
- Windows Command Line Automation & Data Integration
- Re-Defined best practices for Cognos Intercompany Eliminations

APPENDIX:

CLIENT	PROJECT ROLE	SCOPE
Hexcel , Stamford, CT	OneStream Partner - Consolidation	<ul style="list-style-type: none"> ▪ Dynamics Business Rules Data Integration
Allied Power , Baton Rouge, LA	OneStream Partner - Implementation	<ul style="list-style-type: none"> ▪ Consolidation & FP&A ▪ Cube Views & Spreadsheet Dashboard reports
Spaulding Ridge / Superordinary	OneStream Contractor / Developer	<ul style="list-style-type: none"> ▪ Go-Live Application Support & Enhancements ▪ Convert Cube Views to Dashboards
TLC Technologies / (Multiple projects)	OneStream Contractor / Developer	<ul style="list-style-type: none"> ▪ Operational Dashboards: AWS Redshift daily data blended with weekly cube Views.
Sandpoint / (Multiple projects)	OneStream Contractor / Developer	<ul style="list-style-type: none"> ▪ Cube View & Designer Report Dashboards
Archetype / Panoramic Health	OneStream Contractor / Developer	<ul style="list-style-type: none"> ▪ Workflow Dashboards with Data Management Custom Calculate Business Rules
Archetype / Walmart , Bentonville, AR	OneStream Contractor / Developer	<ul style="list-style-type: none"> ▪ Planning Allocation Business Rules ▪ Workflow Dashboards with Data Management Custom Calculate Business Rules ▪ Cube to Cube Data Integration
PWC / Fortune 500 Eversource , Boston, MA	OneStream Contractor / Developer	<ul style="list-style-type: none"> ▪ Data Integration & Automation ▪ OneStream Studio / Designer Dashboard Reports ▪ OneStream Consolidated Report Books
Premier Research , Morrisville, NC	OneStream Partner - Consolidation & FP&A	<ul style="list-style-type: none"> ▪ OneStream Guided Reporting ▪ OneStream Studio / Designer Dashboard Reports
Copart , Dallas, TX	OneStream Partner Consolidation & Account Reconciliation	<ul style="list-style-type: none"> ▪ Migrate BPC -> OneStream / SQL Data Integration ▪ OneStream Designer Dashboard Reports ▪ Intercompany Eliminations & Matching Reports
Carriage Services , Houston, TX	OneStream Partner - Consolidation	<ul style="list-style-type: none"> ▪ Go-Live Application Support & Enhancements ▪ OneStream Studio / Designer Dashboard Reports
Brown & Root , Baton Rouge, LA (Fortune 500 KBR Subsidiary)	OneStream Partner - Consolidation, Account Reconciliation, Planning & Analysis Implementations	<ul style="list-style-type: none"> ▪ Solutions Architect ▪ Automated PowerShell SQL Data Loads ▪ FX, CTA & USD Override ▪ Journals & Eliminations Matching Reports ▪ OneStream Studio / Designer Dashboard Reports
Perficient / Acuity Brands , Atlanta, GA	OneStream Account Reconciliation Implementation	<ul style="list-style-type: none"> ▪ Solutions Architect - Account Reconciliation ▪ Reconciliation & EBS GL Dashboard Reports ▪ EBS GL Data Integration / FX, CTA & USD Override
US-Analytics / Igloo , Katy, TX	OneStream CM Planning & Analysis Implementation	<ul style="list-style-type: none"> ▪ Solutions Architect – CM Analysis ▪ Oracle EBS Sales Order Data Integration ▪ Sales Order Line-Item Drill-Down ▪ Product & Customer CM Analysis ▪ Actuals vs. Standard Cost Variance Reports
Perficient / JM Smith Corp , Spartanburg, SC	OneStream Consolidation	<ul style="list-style-type: none"> ▪ Go-Live Application Support & Enhancements ▪ Convert Cube Views to Dashboards ▪ Report Studio Intercompany Matching Report

CLIENT	PROJECT	SCOPE
Woodside Homes , Salt Lake City, UT	Implement Hyperion Essbase for Financial Consolidation, Planning & Analysis	<ul style="list-style-type: none"> Hyperion Install & Configuration Legal Entity Consolidation, Planning & Financials JDE ERP SQL Data Integration Hourly Load & Consolidation - One Million GL Records in 180 seconds! MAXL Automation, Rules & Scripts SOX Compliant MSAD Security
Chicago Bridge & Iron , Baton Rouge, LA	Financial Consolidation / Business Intelligence Enhancements	<ul style="list-style-type: none"> Re-Deploy Cognos Consolidation for Entity Re-Org Cognos Report Studio Business Intelligence Reporting & Support
Brown & Brown , Daytona Beach, FL	GL Data Extraction for WorkDay Mapping	<ul style="list-style-type: none"> Multiple ERPs & GL COAs in Scope SQL Server & Layer2 Data Integration
Fortune 500, Shaw Group / CB&I Baton Rouge, LA	Implement Financial Consolidation, Planning & Analysis	<ul style="list-style-type: none"> Migrate Cognos to Hyperion Planning Essbase Intercompany eliminations & matching JDE SQL Integration
H&E Equipment , Baton Rouge, LA	Implement Financial Consolidation & FP&A	<ul style="list-style-type: none"> PeopleSoft SQL Integration Employee Forecasting and Analysis
Fortune 500, Flextronics , San Jose, CA	Implement Financial Consolidation, Planning & Analysis	<ul style="list-style-type: none"> Migrate Hyperion HFM to Cognos Advanced Intercompany Eliminations Business Intelligence Reporting
Fortune 500, Dole San Jose, Costa Rica	Implement Financial Consolidation, & FP&A	<ul style="list-style-type: none"> Financial Statements & Reports Planning Allocations - "Cost of Bananas Sold"
Panavision Studios , Los Angeles, LA	Implement Financial Consolidation & FP&A	<ul style="list-style-type: none"> Automated GL Account Balances Load Automated Cash Flow Reporting
E.&J. Gallo Winery , Modesto, CA	Implement Consolidation & FP&A	<ul style="list-style-type: none"> Multiple JDE GL(s) Integration Custom Intercompany Eliminations
Berringer St. Helena, CA	Implement Consolidation & FP&A	<ul style="list-style-type: none"> Automated Import of new Accounts Automated Cash Flow Reporting
Fortune 500, Northrop Redondo Beach, CA	Automate Financial Consolidation	<ul style="list-style-type: none"> Cognos Automation, Enhancements and Technical Support
Fortune 500, Qualcomm , San Diego, CA	Financial Consolidation Application Support	<ul style="list-style-type: none"> Cognos Automation, Enhancements and Technical Support
Fairfield , San Diego, CA	Business Intelligence Reporting Support	<ul style="list-style-type: none"> Cognos Business Intelligence Report & Process Enhancements
Documentum , Sunnyvale, CA	Financial Consolidation Application Support	<ul style="list-style-type: none"> PeopleSoft Drill-Through Integration Report & Process Enhancements
National Pen , San Diego, CA	Financial Consolidation Application Support	<ul style="list-style-type: none"> GL Automated Data Loads & Consolidation