

OneStream Consultant – Robin Morash, CPA, CGA

EPM / CPM EXPERIENCE (25 Years)

- OneStream EPM consulting: 5 Years
- Hyperion & Cognos EPM consulting: 6 Years
- EPM financial systems management: 10 Years
- Cognos EPM technical support: 5 Years

EXPERIENCE SUMMARY

- Six OneStream consolidation projects
- Two OneStream Account Reconciliation Manager Implementations (RCM)
- Two Years - OneStream dashboards reports
- Advanced OneStream Studio reports:
 - BI report books, charts & scorecards.
 - Intercompany matching & journal reports
 - GL stage data & mapping exception reports.
- OneStream data connections & MSAD configuration
- OneStream data integration with JD Edwards, MS Dynamics, and Oracle EBS / VB.Net business rules
- OneStream advanced Account calculations
- Hyperion Essbase SQL data integration
- Hyperion Essbase Maxl automation
- Hyperion Essbase calculation scripts / SQL rules files
- Hyperion Shared Services MSAD authentication
- Ten years on-the-job training IBM / Cognos

SIGNIFICANT ACCOMPLISHMENTS

- OneStream executive dashboards with embedded prompt parameters
- Developed board book meeting presentations from OneStream Studio Business Intelligence reports
- Automated OneStream SQL data loads and email notifications from MS PowerShell scripts
- Implemented OneStream with an Oracle EBS sales order line item detail drill down
- Fortune 500 Financial Systems Manager for 120 month-end closes and 40 re-forecasts
- Designed and implemented a SOX compliant, Journal Entry web application: SQL Server / JDE data integration
- Implemented Hyperion Planning for financial consolidation with Intercompany eliminations
- Automated Essbase GL & Outline dimensions Update; Continues to run every hour today
- Five Fortune 500 Cognos EPM implementations.
- Cognos 1998 & 2001 MVP Award – Highest customer satisfaction rating & billable utilization

Areas of Expertise

- OneStream XF Consolidation & Planning
- OneStream Report Studio
- OneStream Account Reconciliation Manager
- OneStream automation
- OneStream data integration & server configuration
- Oracle / Hyperion Essbase
- Oracle / Hyperion Planning
- IBM / Cognos Consolidation
- IBM / Cognos Report Studio

Professional Training (recent)

- 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

- Aerospace
- Chemical
- Engineering
- Entertainment
- Home Building
- Insurance
- Manufacturing
- Oil and Gas
- Pharmaceutical

Contact information

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PROFESSIONAL EXPERIENCE

ONESTREAM INDEPENDENT CONSULTANT, [EPMCPA LLC](#)

2014 –

- One System Solutions for Financials, Account Reconciliation, Planning & BI Reporting
- Legal Entity Consolidation / Intercompany Eliminations & Matching Reports
- Foreign Currency Translations, CTA & USD Override Business Rule Calculations
- Roll MTD P&L to YTD Retained Earnings. Year End Roll Forwards.
- Indirect Cash Flow Statements
- OneStream Dashboards – SQL Grids & Cube Views
- OneStream Studio Board Book Reports
- ERP SQL Data Integration Business Rules
- PowerShell Automated Data Processing
- Financial Modelling / Rolling Forecasts
- 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

Implement Financial Consolidation, Planning & Analysis

- Five Fortune 500 clients
- CPM / EPM 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	SCOPE
Copart, Dallas, TX	OneStream Consolidation, Account Reconciliation & Close Manager	<ul style="list-style-type: none"> ▪ BPC -> OneStream Consolidation Migration ▪ SQL Data Integration ▪ OneStream Studio / Dashboard Reports ▪ Intercompany Eliminations & Matching Reports
Carriage Services, Houston, TX	OneStream Consolidation	<ul style="list-style-type: none"> ▪ Go-Live Application Support & Enhancements ▪ OneStream Studio / Dashboard Reports
Brown & Root, Baton Rouge, LA (Fortune 500 KBR Subsidiary)	OneStream Consolidation, Account Reconciliation, Planning & Analysis Implementations	<ul style="list-style-type: none"> ▪ Solutions Architect - Consolidation & Account Reconciliation Manager ▪ Automated PowerShell SQL Data Loads / Several ERPS ▪ Drill-Down to transactions ▪ FX, CTA & USD Override ▪ Intercompany Eliminations ▪ Journals & Eliminations Matching Reports ▪ Financial-Close Topsides Journals ▪ Cash Flow Account Calculations ▪ OneStream Studio Dashboard Reports ▪ Excel Add-In Reports / Templates ▪ Rolling Forecasts
Perficient / Acuity Brands Lighting Atlanta, GA	OneStream Account Reconciliation Implementation	<ul style="list-style-type: none"> ▪ Solutions Architect - Account Reconciliation ▪ EBS GL Data Integration Architect ▪ Reconciliation & EBS GL Dashboard Reports ▪ 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 Contribution Margin 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 ▪ Replace Workflow Cube Views with Dashboards ▪ Trial Balance Data Loads & Mapping ▪ Report Studio Intercompany Matching Report ▪ Rolling Forecasts
Woodside Homes, Salt Lake City, UT	Implement Hyperion Essbase 11.1.2.4 - 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

CLIENT	PROJECT	SCOPE
Sparkhound / Chicago Bridge & Iron, Baton Rouge, LA	Financial Consolidation / Business Intelligence Support & Enhancements	<ul style="list-style-type: none"> ▪ Re-Deploy Cognos Consolidation for Nuclear Entity Re-Org ▪ Cognos Report Studio Business Intelligence Reporting & Support
Sparkhound / Brown & Brown, Daytona Beach, FL	GL Data Extraction & Mapping for WorkDay Financials	<ul style="list-style-type: none"> ▪ Multiple ERPs & GL COAs in Scope ▪ SQL Server & Layer2 Data Integration ▪ Data Extraction / Transformation
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 ▪ JDE SQL Integration ▪ Employee Forecasting
H&E Equipment, Baton Rouge, LA	Implement Financial Consolidation & Planning	<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, Planning & Analysis	<ul style="list-style-type: none"> ▪ Financial Statements & Reports ▪ Planning Allocations ▪ “Cost of Bananas Sold”
Panavision Studios, Los Angeles, LA	Implement Financial Consolidation & Planning	<ul style="list-style-type: none"> ▪ Automated GL Account Balances Load ▪ Automated Cash Flow Reporting
E.&J. Gallo Winery, Modesto, CA	Implement Financial Consolidation & Planning	<ul style="list-style-type: none"> ▪ Multiple JDE GL(s) Integration ▪ Intercompany Eliminations
Berringer Vineyards, St. Helena, CA	Implement Financial Consolidation & Planning	<ul style="list-style-type: none"> ▪ Automated Import of new Accounts ▪ Automated Cash Flow Reporting
Fortune 500, Northrop Grumman, 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 Residential, San Diego, CA	Business Intelligence Reporting Support	<ul style="list-style-type: none"> ▪ Cognos Business Intelligence ▪ Report & Process Enhancements
Documentum, Sunnyvale, CA	Financial Consolidation Support	<ul style="list-style-type: none"> ▪ PeopleSoft Drill-Through Integration ▪ Report & Process Enhancements
National Pen, San Diego, CA	Financial Consolidation Support	<ul style="list-style-type: none"> ▪ GL Automated Data Loads & Consolidation