

# OneStream Consultant – Robin Morash, CPA, CGA

## EPM / CPM EXPERIENCE (28 Years)

- OneStream EPM / BI consulting: 7 Years
- Hyperion & Cognos EPM consulting: 6 Years
- EPM Fortune 500 systems management: 10 Years
- Cognos EPM technical support: 5 Years

## EXPERIENCE SUMMARY

- OneStream silver partner – EPMCPA® Consultants
- OneStream full-stack application developer:
  - Front end – OneStream end user dashboards.
  - Back end – OneStream VB.Net business rules & UD8 member scripts.
- 14 OneStream customer projects
- Three Years – 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 AWS Redshift 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 on-premise 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.
- Automated Essbase outline dimension update.
- Five Fortune 500 Cognos EPM implementations.
- Cognos 1998 & 2001 MVP Award – Highest customer satisfaction rating & 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

### ONESTREAM INDEPENDENT CONSULTANT, [EPMCPA LLC](#)

2014 –

- One System Solutions for Financials, Account Reconciliation, Planning & BI Reporting
- 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

#### **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:**

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

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