

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

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EPM / CPM EXPERIENCE (29 Years)	Areas of Expertise
<ul style="list-style-type: none"> ▪ OneStream EPM consulting: 8 Years / 15,000+ hours 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 	<ul style="list-style-type: none"> ▪ 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
ONESTREAM EXPERIENCE (8 years)	Professional Training
<ul style="list-style-type: none"> ▪ OneStream full-stack application developer: <ul style="list-style-type: none"> ○ Front end – OneStream end user dashboards ○ Back end – OneStream VB.Net business rules https://epmcpa.com/featured ▪ 18 OneStream customer projects ▪ OneStream dashboards (<i>OneStream BI Designer, BI Viewer / DevExpress reports</i>) <ul style="list-style-type: none"> ○ 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 <ul style="list-style-type: none"> ○ Preparer / Approver Dashboard Scorecards. 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) 	<ul style="list-style-type: none"> ▪ OneStream Boot Camp / Systems Administration I ▪ OneStream Rules II ▪ OneStream Report Studio II ▪ OneStream BI Viewer ▪ 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
SIGNIFICANT ACCOMPLISHMENTS	Industry Experience
<ul style="list-style-type: none"> ▪ 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. 	<ul style="list-style-type: none"> ▪ Chemical ▪ Engineering ▪ Entertainment ▪ Home Building ▪ Insurance ▪ Manufacturing ▪ Pharmaceutical <p>Contact information robin.morash@epmcpa.com 193 S Donmoor Ave. Baton Rouge, LA 70806 (225) 281-9873 www.epmcpa.com® </p>

PROFESSIONAL EXPERIENCE

INDEPENDENT CONSULTANT, EPMCPA LLC

2014 –

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

- OneStream Operational Dashboards – External SQL blended with Cube View data
- OneStream BI Viewer Dimension Drill-Down Charts
- OneStream Designer (Studio) Board Book Reports
- Intercompany Eliminations & Matching Reports
- Foreign Currency Translations, CTA & USD Override
- Financial Modelling / Rolling Forecasts custom calculate Finance Business Rules
- Dashboard Extender Business Rules
- 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	OS Consolidation, FP&A Enhancements	<ul style="list-style-type: none"> ▪ Dynamics Business Rules Data Integration ▪ Topside Journal Dashboards & Business Rules
Allied Power , Baton Rouge, LA	OS Consolidation, FP&A Implementation	<ul style="list-style-type: none"> ▪ OneStream BI Viewer Drill-Down Charts ▪ Data Load & Mapping Dashboard Grids.
Penske , Reading PA	OS FP&A Enhancements	<ul style="list-style-type: none"> ▪ FP&A self-serve Seeding & Versioning Dashboard.
Spaulding Ridge / Superordinary	OS Consolidation, FP&A Enhancements	<ul style="list-style-type: none"> ▪ Go-Live Application Support & Enhancements ▪ Convert Cube Views to Dashboards
TLC Technologies / (Multiple projects)	OS Consolidation, FP&A Enhancements	<ul style="list-style-type: none"> ▪ Operational Dashboards: AWS Redshift daily data blended with weekly cube Views.
Sandpoint / (Multiple projects)	OS Consolidation, FP&A Enhancements	<ul style="list-style-type: none"> ▪ Cube View & Designer Report Dashboards
Archetype / Panoramic Health	OS Consolidation, FP&A Enhancements	<ul style="list-style-type: none"> ▪ Workflow Dashboards with Data Management Custom Calculate Business Rules
Archetype / Walmart , Bentonville, AR	OS Consolidation, FP&A Enhancements	<ul style="list-style-type: none"> ▪ Planning Allocations in Business Rules. ▪ Workflow Dashboards with Data Management Custom Calculate Business Rules.
PWC / Fortune 500 Eversource , Boston, MA	OS Consolidation, FP&A Enhancements	<ul style="list-style-type: none"> ▪ Data Integration & Automation ▪ OneStream Studio / Designer Dashboard Reports ▪ OneStream Consolidated Report Books
Premier Research , Morrisville, NC	OS Consolidation, FP&A Enhancements	<ul style="list-style-type: none"> ▪ OneStream Guided Reporting ▪ OneStream Studio / Designer Dashboard Reports
Copart , Dallas, TX	OS Consolidation, FP&A, 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	OS Consolidation, FP&A Enhancements	<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)	OS Solutions Architect - Consolidation, FP&A, Account Reconciliation Implementation	<ul style="list-style-type: none"> ▪ Automated PowerShell SQL Data Loads ▪ FX, CTA & USD Override ▪ Journals & Eliminations Matching Reports ▪ OneStream Studio / Designer Dashboard Reports
Perficient / Acuity Brands , Atlanta, GA	OS Consolidation, FP&A Enhancements	<ul style="list-style-type: none"> ▪ Account Reconciliation Dashboard Reports. ▪ EBS GL Dashboard Reports. ▪ EBS GL Data Integration / FX, CTA & USD Override
US-Analytics / Igloo , Katy, TX	OS CM Planning Implementation	<ul style="list-style-type: none"> ▪ 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	OS Consolidation, FP&A Enhancements	<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
Beringer 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