

Brad Resner

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Oracle EPM Architect

Key Strengths

Oracle EPM Cloud	(E)PBCS	NSPB	ARCS	Planning
Narrative Reporting	DRM	EDM	Freeform	Enterprise Architecture
Workforce	Capex	Data Mgmt	PCM	EPM Administration
Database Design	SQL	EPM Automate	Smart View	Management Reporting

Education

Masters Degree in Business Administration (Finance)	Butler University
Bachelors Degree in Industrial Engineering (Operations)	Purdue University

Professional Experience

Aletheia Consulting (Independent EPM Consultant) (Jun 2015 – present)

SMBC

ARCS

- Accounts Reconciliation development
- Transaction matching build and test or 3 reconciliations
- Integration with Oracle BIP reports and on prem client source systems
- Configuration of all ARCS components
- Build of custom report SQL queries and report templates

Artera

EPBCS

- Enterprise reporting solution
- Management reporting solution by territory
- FCCS integration for statutory reporting

Moderna

EPBCS

- Enterprise EPM upgrade of existing solution to accommodate new COA + FCCS implementation
- Planning, Workforce, Capex, FCCS custom implementation
- Historical COA conversion to new structure using AWS RDBMS mapping solution
- Deploy new ASO cube for consolidated reporting

Various Clients

NSPB

- 10+ client implementations of NSPB, both premium and standard edition
- Standard OOB solution deployment with Netsuite integration and customization of saved searches
- Premium and standard versions with customizations
- Application deployment in former NSPB fully customizable format and new prebuilt modules format
- New project development and existing deployment support

Central Bank

EPBCS

- Enterprise EPM solution including FCCS, EDM, Planning, ARCS, PCMCS and TRCS
- Detailed instrument level zero based budget revenue planning model for Loans, CDs and deposits
- Workforce and Capital expenditure planning models
- Narrative reporting for Branch level operational metrics
- ASO consolidated cube with integrations from all cubes for daily and periodic data
- Bi-directional interface of forecast data between PCMCS and PBCS

The Heritage Group

EPBCS

- Consolidated reporting solution in new Oracle Enterprise Planning and Budgeting environment
- Deployment of 9 PODS consisting of free form, custom and EPBCS (modules) applications
- Integration between all PODS to consolidated ASO cube
- 5 BSO cubes to source trial balance data for each subsidiary and handle planning processes
- Narrative Reporting deployment with integration to all PODS and plan types
- EDMCS master data management solution for all PODS
- Budgeting and Reporting solution for division of Construction company
- Integration to Peoplesoft using new EPM Agent direct SQL integration
- Planning build of forms and rules to eliminate current spreadsheet planning process
- Reporting build of 100 + FRS templates rendered and updated monthly with substitution variables in Excel Smart View to allow in line commentary of Actual reports

Training Company (NYC, NY)

EPBCS

- Custom Revenue, COS and Indirect Expense implementation using input plan type
- Course level planning across all campuses
- Workforce and CAPEX modules based implementation
- Integration to HCM and Oracle Cloud Financials
- Standard reporting

Ilitch Holdings - Sports & Entertainment (Detroit, MI)

PBCS

- Financials and Reporting implementation for sports franchises and entertainment businesses
- Design and Build of custom solution in PBCS to fit into parent companies' application structure
- Complex allocation of revenue and cost to transform legal results to management reporting view

Drive Shack (NYC, NY)

PBCS, ARCS

- ARCS implementation with 3-way matching to reconcile daily account balances with merchant services and POS data sources
- Automation of matching rules with thresholds to expedite daily reconciliations
- Data sourcing of all inputs using data management with manipulation and comparison of date strings
- PBCS solution for revenue and expense planning

Virginia ABC (Richmond, VA)

PBCS

- Public Sector EPBCS implementation
- Financials, CAPEX and Workforce public sector implementation
- Custom workforce cube
- Integrations to Oracle EBS and standard PBCS integrations
- Standard reporting

Kaplan Education (Alpharetta, GA)

DRM, EPBCS and ARCS Architect

- Architect for DRM system managing metadata for 4 target systems (EBS, GL, EPBCS and FCCS)
- Integration with data management for all EPM products; EPM Automate for all interfaces
- Design of hierarchies to maintain old to new chart of account structures with exports to DM to map values for all systems
- Use of Cloud DM for bi-directional integration with Cloud Financials and DRM
- Implementation of Budgeting process in EPBCS
- Implementation of ARCS reconciliation process for multiple company segments

Select Equity Group (NYC, NY)

Enterprise Budgeting and Planning Cloud Lead

- Design, Build and Test customizations for EPBCS Financials and Workforce modules
- Customization of all metadata, webform processes, trend and driver inputs, manual inputs, webform modifications and customization of data loads in FDMEE as well as data transfer between cubes.
- Dashboard implementation and customization, security on 4 dimensions and workflow implementation.
- Financial Reporting Studio reports.

Daimler – Mercedes (Vance, AL)

Hyperion Planning and Essbase Advisory Consultant

- Perform architecture assessment and create roadmap for key performance and stability improvements
- Hyperion system 11.1.2.4 Planning and Essbase, EPMA with FR Studio
- Implementation of architecture improvements and application tuning
- Provided technical assessment of CXO Cockpit tool versus OBIEE and assisted with product selection
- Delivered on key initiatives to improve performance and stability of application including dimensionality changes, business rule optimization, backup and restore procedures as well as security improvements.
- Provided administrator training and best practices to improve usability; provided long term
- Advisory work supporting proposal to move Planning to the Oracle Cloud PBCS service

Healthcare client (UK)

Fusion Financials Reporting Consultant

- FR Studio and OTBI reporting for Fusion Financials implementation
- Detailed Financial Statement reporting in FRS
- Operational transaction level reporting in OTBI

Telecommunications client (Boston, MA)

PBCS Consultant

- PBCS implementation of P/L, Balance Sheet, Cash Flow, CAPEX and Workforce modules
- Revenue build of subscription and non-subscription revenue across multiple channels and customer segments
- BI Publisher and FR Studio reporting out of Oracle Fusion Financials
- Provided Smart View and FR Studio training for all client resources

Beachbody (Santa Monica, CA)

PBCS Consultant

- Build and support Budget and forecasting process
- PBCS with integration to on premise HFM consolidation application
- FDMEE integration for data loads
- Complex weekly subscription revenue model build for consumer service and franchise product lines
- Product level weekly and monthly forecasting of all revenue and expenses with allocation methodology to drive total P/L budget
- Complex allocation logic for COGS and overhead across multiple plan types
- Developed and delivered functional training for FP&A group as well as technical training for all administrators.

Darden Restaurants (Orlando, FL)

DRM Architect

- Source 12 hierarchies in DRM for new HFM tax consolidation application
- Export ADS file format for EPMA integration, plus two exports with FDM mappings
- Design DRM system for future integration with other HFM applications and EBS
- Responsible for DRM design, implementation, testing, transition and training
- DRM property setup, exports, validations scripts and formulas

Toronto Dominion Bank (Toronto)

DRM Consultant

- Source 16 hierarchies and reference data sets in DRM
- Integration with SQL Server staging area for consumption by downstream reporting apps
- Full property definition and implementation, security, exports and validations

PNC Bank (Pittsburgh, PA)

Essbase and Planning Consultant

- Development and support of multiple Planning applications and Essbase cubes
- Budget Cost Allocation cube development with SmartView input forms to allocate overhead cost for all business units
- Budget data seeding calculation scripts (3 versions)
- Planning (v11.1.2.3), Essbase, FR Studio, Excel VBA

Vertical Edge Consulting Group (Midwest Practice Director) (Mar 2011 – Jun 2015)

Telamon Corporation

Lead Architect and Delivery Consultant

- Essbase 11.1.2.3 Financial Reporting cube
- Direct integration with 4 sources; production of 3 standard financial statement
- Rolling 12 month actual data view for AD HOC analysis and reporting
- FR Studio, Essbase, EBS integration

Moorehead Communications

Director of IT Development and Service Desk, Hyperion Project Lead

- Financial Reporting and Planning Application build (11.1.2.3 PBCS).
- Operational data reporting through multiple Essbase cubes.
- FDM integration with Microsoft Dynamics and OBIEE reporting.
- FR Generation of Financial Reporting package.

Luxottica Retail

Luxottica Retail Planning Application Consultant

- North America Retail Planning Application design and build, including Manufacturing operational analytics application (v 11.1.2.2) – *Planning / Analytics Lead*
- Design and Build for 3 multi-currency Planning applications.

Tower International

Tower HFM and Planning Implementation Lead

- Corporate Planning and Consolidation system implementation –*Planning / Analytics Lead*
- 3 Essbase cubes for demand forecasting, Actual data reconciliation and Allocations. Planning application with 3 plan types at part and vehicle level.
- FDM implementation to translate from HFM to Essbase due to varying dimension structures.

Biomet3i

Biomet Planning and Sales Analytics –*Planning / Analytics Lead*

- Project Delivery Lead for Hyperion Planning (v 11.1.2.2) and Sales Analytics BI solution
- Multi-currency Workforce, CAPEX and Financial consolidation planning application
- Sales Analytics data warehouse and reporting system design and build.

BrightPoint

BrightPoint Planning Application –*Project Lead & Design Consultant*

- Project Delivery Lead for Hyperion Planning implementation (v 11.1.2.2)
- Workforce, Revenue, Opex & Financial Statement plan types

Vantiv

Vantiv ERP Integration Project –*EPM Technical Lead*

- Updates to 3 Essbase cubes and 2 Planning applications to accommodate EBS R12 implementation
- DRM deployment to EBS and EDW, implementation of new dimensionality in DRM
- Financial Institution Planning application development of all new planning forms and processes to handle seeding data from all customer segments and components of revenue growth.

Teradata

Teradata Hyperion Planning Project –*Project Lead/Implementation Consultant*

- Project Delivery Lead for Hyperion Planning implementation (v 11.1.2.1)
- Led Design sessions to build Implementation roadmap covering 4 unique phases
- Consolidation application in Planning with custom currency translation.
- Webforms, Financial Reports, custom currency conversion, HFM and EDW integration.

INDUSTRY EXPERIENCE:

AT&T

Uverse & Network Solutions – SR. TECHNICAL DIRECTOR

(Mar 1999 – Mar 2011)

ACCENTURE

CONSULTANT

(Mar 1997 – Mar 1999)