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**Excel / Access / SQL / VBA Developer**  
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## Summary

I am seeking short-term application development opportunities in the San Francisco area and long-term opportunities in the Phoenix area. My development skills, mathematical, financial, and accounting background, business acumen and motivation allow me to work effectively with all levels of personnel. I am very motivated and anxious to put my experience to work meeting new challenges.

I have worked with relational databases since 1988. However, I have invested a major portion of my time during the past sixteen years developing Visual Basic for Applications (VBA) projects within MS Office. I have designed, developed, documented, and maintained very successful, user-friendly VBA applications primarily in Excel and Access, but also in PowerPoint, Visio, Word, and Project.

## Skills

*Languages:* VBA, Visual Basic 5/6, VB.NET, T-SQL, PL/SQL, SQL\*Plus, TOAD, SQL Navigator, SQL\*Loader, SQLTalk, SQLWindows, APL, JavaScript, Informix-NewEra, SQR, HTML/CSS, C/C++, Perl.

*Development Tools:* MS Excel, Access, Visual Studio, SSIS, SSAS, Project, Word, Visio, PowerPoint, Scope, UML, BusinessObjects, Crystal Reports, Visual SourceSafe, System Architect, ERWin, CASE:W, ProtoGen.

I am well versed in the core functions of SQL and normalization. I have very strong analytical skills and a deep understanding of SQL and the relational model.

## Education

BS degree in Management Information Science and BA in Mathematics, California State University Sacramento (double major, cum laude)

## Work Experience:

*October 2017 – Present*

**Ross Stores (via Modis/Adecco) - Dublin, CA.**

Database Analyst/Excel Developer – Additional follow-up projects contracted at Ross Stores

- Store Operations department -- Provided additional documentation for previous work in Access and Excel and resolved problems associated with external data anomalies. Completed 11/1/2017.
- Compensation department (HR) -- Designed and implemented enhancements and corrections to existing Excel/VBA based compensation analysis applications.

*January 2016 – July 2016 (follow-up projects: December 2016 – March 2017, May 2017)*

**Ross Stores (via Adecco) - Dublin, CA.**

Excel/VBA Developer – Short-term contract designing and developing Excel/VBA applications for the Human Resources department at Ross Stores.

- Designed and developed applications to import HR data and distribute relevant data to selected supervisors.

Database Analyst/Developer – Follow-up contract at Ross Stores designing and developing MS Access and Excel applications for the Store Operations department.

- Debugged and documented existing Access and Excel/VBA applications.
- Designed and implemented two Access databases including VBA code
  1. To import, export, and report monthly and weekly status of repair contracts.
  2. To import janitorial questionnaires, and generate exception reports and extremely flexible Excel workbooks.

Database Analyst – After completing all projects, I departed for 4 months before being asked to return in December, 2016 when I successfully designed and developed new Access/Excel/SQL/VBA applications. I created Excel templates that contain parameters and SQL statements to extract Access data into top-level worksheets and VBA code to drill-down the data. I returned in May to import data from Interactive Voice Response (IVR) CSV files into Access and provide new reports.

*October 2015 – December 2015*

**Ernst & Young (via enableIT) – San Francisco / Century City, CA**

Software Developer/Analyst – Short-term contracting to provide Excel/Access/PowerPoint/VBA development and analysis.

- I successfully completed three projects related to EY's work at Banamex. VBA coding in each application has dramatically improved accuracy and efficiency and dramatically reduced time requirements.
- The first project provides VBA code and user tables to define and transfer information from numerous workbooks to a consolidated workbook and ultimately into tables, charts, and pictures in a PowerPoint presentation. There are a number of options for defining ranges and objects in each of the user tables. During all transfers, users are allowed to view each anticipated update and decide whether to allow the update, continue previewing updates, continue without previews, or stop. Error messages are displayed on the screen and in user tables.
- I designed the second project using Excel/VBA to restructure and replace a difficult process that matched addresses having the same identification key but collected from different sources with different numbers of address lines. Four tables allow users to specify rules for comparisons (a character string replacement table, a phrase replacement table, a second phrase replacement table, and a table of equivalents that can be considered likely matches). Each pair of addresses is graded and displayed with similar font colors showing equal or equivalent (in italics) words and phrases.
- The third project automates the preparation of Excel workbooks, and imports worksheets to and from Microsoft Access. A user form within each of two Access databases simplifies processing steps and logs the results, including error messages. The VBA code that supports most of the processing is either new or enhanced.

*May 2010 – July 2015*

**Microsoft Corporation (via PT Systems) – San Francisco, CA**

Software Developer/Analyst – Full-time contracting to provide Excel/VBA and SQL development and analysis.

- Lead developer for a MS Excel/VBA pricing analysis application that generates rate cards for web-based advertising in 25 markets. I consistently enhanced the project and delivered monthly pricing reports, including sophisticated graphs, bubble charts with trend lines, and email reports using CSS style sheets.
- Assumed additional responsibilities in September, 2012, to extract, transform, and load MS SQL Server data using SQL Server Integration Services (SSIS) and (SSAS) for a project that provides bid guidance for advertising auctions.

*August 2009 – December 2009*

**THINKNICITY – San Francisco, CA**

VBA Developer – Designing and implementing MS Office applications with an extensive use of VBA code.

- Developed a 40 table MS Access Five-Year Product Strategy plan at [Foster's Group](#) in St. Helena, CA.
- VBA code creates and maintains multiple scenarios for volumes and blends by product line for wineries in the group.
- In August, assisted [Triton Container/Perot Systems](#) in San Francisco by correcting VBA code upgraded to Excel 2007.
- All short-term contract work was completed in December 2009.

*September 2005 – June 2009*

**UBS Investment Bank (via R&W Capital) - Chicago, IL**

Software Developer/Analyst – Providing software analysis and development.

- Full-time contract with [UBS Investment Bank](#), Exchange Traded Derivatives department in Chicago.
- Primary designer and developer of user-friendly Excel/VBA applications that process data files and reports to and from UBS clients, including Barclays Global Investors (now BlackRock), Goldman Sachs Assets Management, Deutsche Asset Management, Mellon Capital Management, State Street Global Advisors, Bridgewater Associates, TwinFields Capital Management, Clarke Capital Management, Suncorp Group, and Caxton Associates.
- I designed 10 extremely successful Excel/VBA applications at UBS in collaboration with business stakeholders, developed, documented, and maintained. My creative interfaces to internal data have promoted straight through processing. Documentation includes Word documents, HTML, compiled HTML, and PowerPoint presentations. All applications, their prior versions, summary notes, and user documentation are available to authorized users via a menu system that I developed. Applications make extensive use of VBA code. Primary users are located in Chicago, Stamford, London, and Sydney. Super-users can maintain client-related tables and have access to additional documentation.

*September 2003 – September 2005*

**UBS Investment Bank (via TEXSOURCE) – Chicago, IL (Telecommuting from Danville, CA).**

Software Developer/Analyst – Providing software analysis and development.

- Enhanced VBA Excel applications for managed trading accounts. The initial project extended the use of Monte Carlo techniques, and follow-up projects for the Chicago and Sydney offices have expanded data transfers and reports to include additional clients.
- Additional work includes designing, developing, and maintaining a new Excel/VBA application to process files received from Bloomberg. The application summarizes trades, consolidates by client, and prepares an e-mail for each client.
- Full or part-time work based on requirements.

*May 2004 – December 2004*

**Charles Schwab (via GLOTEL) – San Francisco, CA**

Contractor/Software Analyst – Preparing financial reports and providing software automation.

- Assembled Excel based reports, such as the Monthly Business Report and the Transfer Of Accounts Dashboard, from Oracle database sources using TOAD, SQL Navigator, reports, and personal contacts.
- Increased the timeliness and accuracy of reports through VBA automation.
- Located many of the data sources and provided PL/SQL scripts for two new executive dashboards.

December 2002 – May 2003

**Harris and Associates** - Concord, CA.

Programmer/Analyst – Designing new software applications and extending existing capabilities of project staffing applications for the Bay Area District Headquarters of the California Department of Transportation ([Caltrans](#)).

- Modified and developed new Excel VBA applications, including interfaces with MS Project.
- Developed new MS Project applications, including VBA interfaces with Excel.

April 2002 - June 2002

**Relevant Business Systems** - San Ramon, CA.

Programmer/Analyst – Developing functional specifications, technical specifications, and software applications for an Enterprise Resource Planning system.

- Developed mostly technical specification for nineteen software programs to be included in Relevant's INFIMACS II® ERP products.
- Programmed five new INFIMACS programs using Informix-NewEra 4GL.

April 1995 - June 2001

**ReleaseNow.com** - San Carlos, CA. (ReleaseNow.com is no longer in operation.)

Consulting Manager/Senior Software Engineer – Analyzing, designing, and programming primarily Visual Basic software solutions to support on-line sales of ReleaseNow partners.

- Analyzed, designed, programmed and maintained integrated VB/CGI applications for box delivery of products from outside fulfillment houses such as [GlobalWare](#). These include Orders, Shipping Confirmations, Backorders, Inventory, and automated customer and internal emails.
- Designed and programmed tools to create and view multi-paged Excel reports and CSV files from VB applications using Excel's COM object model and the (VB6) File System Object. Utilized these tools to create accounting and tracking reports from an Oracle 8 database.
- Assisted in the conversion of selected reports to BusinessObjects.

**Client Server Designs (Acquired by ReleaseNow.com April 1999)** - Alameda, CA.

Independent Consulting in the San Francisco Bay Area.

Consulting Manager - Building turn-key, SQLWindow and Visual Basic applications. Assisting other development teams in migrating to client/server architecture. Assisting clients with business requirements and database designs using Unified Modeling Language diagrams. Clients include:

[3Com Corporation](#)

- Responsible for maintenance and enhancement of SQLWindows applications for Repairs and Contracted Software Fulfillments. Designed, programmed, and implemented barcode integration and Y2K compliance for each of these applications.
- Project lead for a portion of the conversion from ASK/MANMAN to SAP. Conducted JAD sessions with developers and business analysts to meet business requirements and develop project plans.
- Assisted in the conversion of SQLWindows applications to ClearLogistics (Clarify, Inc.).
- Created new SQR reports and translated existing non-PostScript Windows reports to Unix/PostScript.

[Firstwave Technologies \(formerly Brock International\)](#)

- Participated in JAD sessions to define requirements for new software versions using OMT sequence and state transition diagrams (essentially UML diagrams) in System Architect.

[Charles Schwab](#)

- Extended the capabilities of a CRM application using SQLWindows code.
- Wrote "Legacy Data Download Specifications" for the Custom Broker Project, including Oracle database modification scripts and SQL\*Loader scripts.

December 1994 - April 1995

**Self Employed - Danville, CA.**

Senior Independent Software Engineer/Analyst

- Designed, programmed, and implemented a SQLWindows Tax Calendar application for the San Francisco office of [PricewaterhouseCoopers](#). Concurrently, translated the client's APL database into a Gupta SQL database.
- Completed two phases of modifications to SalesTrak, a commercial sales tracking system by Aurum Software. My work included the addition of fax and e-mail capabilities. Aurum was acquired by Baan, SSA GT, and [Infor Global Solutions](#).

July 1992 - December 1994

**Terrace Systems Corporation** - San Francisco, CA.

Senior Developer/Consulting Manager - Developing C++ and SQLWindows client/server applications.

- Assisted in the design, development and implementation of an on-line customer tracking system for [BancBoston Robertson Stephens](#). Operational reporting from the SQL Server database included customers, investments, companies, proposed mergers, employees, and relationships. Utilized ProtoGen to generate portions of the C++ code and manually developed the remaining code.
- Designed and implemented various management reports using Crystal Reports.
- Active participant in the development of Terrace's Threshold class library for SQLWindows.

April 1988 - June 1992

**Price Waterhouse Technology Centre** - Menlo Park, CA.

**(Currently PricewaterhouseCoopers Global Technology Centre** - San Jose, CA)

Software Engineer/Manager in System Support Group 1988 - 1991

Software Engineer/Manager in Tax Technology Group 1991 – 1992

- Analyzed artificial intelligence and other new technologies.
- Designed and programmed a hypertext COBRA questionnaire in the C language.
- Team member programming and developing an International Assignee Tax Service planning and tracking system using SQLWindows client/server technology.
- Developed and maintained the database and applications used by the San Jose office to collect, calculate, and report semiconductor industry statistics. Reports from this application to trade associations, including the World Semiconductor Trade Statistics organization ([WSTS](#)), provided the [data](#) for the industry's closely watched and highly publicized book-to-bill ratio.

## Summary of RDBMS Experience (in addition to MS Access)

|             | <b>Location</b>       | <b>RDBMS</b>        | <b>Programming Language</b> | <b>Interface Program</b>                                       |
|-------------|-----------------------|---------------------|-----------------------------|--|
| 2012 - 2015 | Microsoft Corporation | MS SQL Server       | Transact-SQL                | Visual Studio, Scope, SQL Server Management Studio, SSIS, SSAS |
| 2004 - 2004 | Charles Schwab        | Oracle              | PL/SQL                      | TOAD, SQL Navigator, SQL*Plus                                  |
| 1999 - 2001 | ReleaseNow.com        | Oracle              | VB6                         | SQL*Plus and WinSQL  |
| 1996 - 1998 | 3Com                  | (Gupta) SQLBase     | SQLWindows                  | WinTalk  |
| 1995 - 1995 | Charles Schwab        | Oracle              | SQLWindows                  | SQL*Plus and SQL*Loader  |
| 1993 - 1994 | Robertson Stephens    | (Sybase) SQL Server | C++                         | ISQL   |
| 1988 - 1992 | Price Waterhouse      | (Gupta) SQLBase     | SQLWindows                  | SQLTalk  |