

Roger Panfil

Solutions Architect / Project Manager / Business Analyst / BI Developer
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Summary of Qualifications

- ❑ Over 30 years of professional experience spanning projects involving **business intelligence, data warehousing, enterprise application integration, mobile, Web and client/server** technologies.
- ❑ Professional IT consultant performing in a **variety of roles with billable hours since 2004**.
- ❑ Proven **personnel management and product development experience**. Leadership skills demonstrated against aggressive objectives, critical product delivery dates and complex application development projects involving the coordination of diverse groups of personnel towards common goals.
- ❑ **Application development experience** with all Information Builders' technologies (WebFOCUS, FOCUS, EDA/SQL, iWay and Maintain) as well as COBOL, Natural/ADABAS, SMALLTALK (Object Oriented) and SQL.
- ❑ Strong **data modeling & data design skills**.
- ❑ Extensive **project management skills** developed in accordance with various Project Life Cycle methodologies.
- ❑ **Current WebFOCUS 8 development skills**; Presenter at numerous IBI Summit conventions.

Professional Experience

September 2004 to Present – RDC Business Solutions

Headquartered in Yardley, Pennsylvania, RDC Business Solutions (“RDC Biz”) helps organizations across the United States leverage their investment in business intelligence and data warehousing technologies.

Engagement Leader, Solutions Architect, BI Developer

- ❑ Present: State of Florida Department of Transportation (FLDOT) - Tallahassee FL, WebFOCUS 8.203: Master Architect leading the modernization of FLDOT's business intelligence platform. A massive mainframe WebFOCUS installation, the entire codebase is being migrated to Windows to free CPU capacity and thus reduce WebFOCUS out of any mainframe upgrade equation. Responsibilities include redeveloping all HTML forms to new responsive HTML forms, leading problem detection and solution implementation for all issues related to mainframe coded running on Windows, implementation of development Best Practices and mentoring for FLDOT staff, requirements gathering for new portal content, design and development of the first WebFOCUS 8.2 portal for the Office of Work Program and Budget. The WebFOCUS 8 responsive form templates used at this account were selected for presentation at IB Summit 2019.
- ❑ Associated Grocers of New England (AGNE) - Pembroke NH, WebFOCUS 8.105: Debugged and corrected a series of sales reports that were displaying incorrect budget data (affecting all dependent calcs). Enhanced a Sales Analysis Reporting Portal with a new tab to display budget performance measures extracted from the budget reports. Added a new tab to AGNE's guided ad hoc reporting portal for Finance and Procurement users to report reclamation data.
- ❑ Experient - Frederick MD, WebFOCUS 7.6 account moving to release 8.2: Applied Best Practices using WebFOCUS application file paths and -INCLUDE to reduce the amount of code the account needed to manage. Built WebFOCUS Business Views to introduce dimensional views and the auto-drill feature. Moved DEFINES from fexes to synonyms to simplify new report development, ease maintenance and make virtual fields available to InfoAssist users. Demonstrated 8.2 InfoAssist, showed users how to create a multi-line trend-graph, embellished synonyms with columns names and

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other metadata to ease reporting. Advised on the required conversion from CGI calls to webservice calls from their custom .Net UI to the WebFOCUS 8 server.

- ❑ Simtech USA - Levittown PA, SQL/SQL Server/Excel: Managed a team of three Business Analysts in a multi-system data reconciliation project involving 26,000 part numbers across Simtech's price book system, web catalog and accounting system (Macoloo/SQL Server). Determined missing, mis-matched and retired part numbers across all three systems. Designed, led and contributed to a heavy data cleanup effort. Created Excel or XML-based part number load, delete and change documents as dictated by each system. Scrubbed and produced the 2018 price books.
- ❑ Contributed to WebFOCUS development on various RDC projects: Launch pages via HTML Composer, Reports (AppStudio and Editor-based development/maintenance). Metadata design using App Studio (embellished WebFOCUS synonyms with Defines & Computes; created Business Views/Dimensional Views).
- ❑ Managed several high-profile, large-project Healthcare portal solutions involving provider-oriented operational and financial measures:
 - Memorial Hospital, Springfield IL – Project Manager and Architect for a 2-year data warehouse & BI project. Integrated some 70 different data/file types (flat, relational, EDI, etc.; Allscripts/EPsi, Press Ganey survey data, Lawson financials, HAMPS claims data, more) which were converted into XML documents and subsequently loaded into a central data warehouse. iWay Data Quality Center was used to ensure integrity of the data. Created 100 key volume measures for the executive team and business line managers and deployed them for use in a WebFOCUS portal. IBI Success Story & Summit Presentation.
 - St. Luke's University Health Network, Bethlehem PA – Led a team of 10 BA's to describe nearly 700 service line measures for use in a WebFOCUS portal. The effort was commissioned to modernize a very manual excel-based scorecard application. The project involved pulling data from McKesson HBI into a SQL-Server data mart and development of the WebFOCUS portal to display the measures. IBI Success Story & Summit Presentation.
 - Reid Healthcare, Richmond IA – Led a 4-person development team in the extraction of Epic healthcare records for a service line performance application. Designed and loaded a SQL-Server data mart, described over 40 measures and developed the WebFOCUS portal to display the measures and reports.
 - Lutheran Life Communities, Arlington Heights IL – Managed a development project to convert a large, complex excel operational performance scorecard into a WebFOCUS Portal + SQL-Server database. The effort involved consolidating disparate data formats from multiple facilities. Performed in a BA role to gather project requirements from the client's users. Measures were created for the executive team across business categories of Census, Labor, Culinary and Revenue.
 - Fred Hutchinson Cancer Research Center, Seattle WA – Project Manager and Architect for a large team that converted an ancient PeopleSoft + Crystal Reports application to a modern SQL-Server data warehouse + WebFOCUS portal application. The two-year effort replaced hundreds of Crystal Reports with the new online application and a handful of parameter driven WebFOCUS reports. This was a start-to finish project involving comprehensive requirements gathering, JAD sessions, UI design, etc. IBI Success Story & Summit Presentation.
 - All were successful long-term projects with heavy travel requirements.

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- ❑ In addition to the Healthcare portal projects above, served as the Solutions Architect for major WebFOCUS Portal / Dashboard applications at eShots, SPI Healthcare, Weis Markets, Penske Automotive (IBI Summit Presentation), Apollo Global and more.
- ❑ Managed the delivery of Business Intelligence & Data Warehousing project services to an impressive list of clients including Mohawk Paper, Erie Insurance, Weis Markets, Security Check, RR Bowker, Visteon, USBank, Bio Med Sciences, Purina, City of Philadelphia, PA Department of Revenue, ABC Financial, Staples Promotional Products, Meritor, World Wide Technologies, Blue Coat, Veolia Energy, Chubb Insurance, City of Houston, Babcock Power and more.
- ❑ Conducted Business Intelligence Assessments for North American Lighting, Dematic Corp, Hospital Corporation of America (HCA), Staples Promotional Products, Visteon, Choctaw Nation and Beryl Health, Siemens Mobility and Experient.
- ❑ Conducted Data Warehouse Assessments for Wells Fargo Bank, XL Health, SWBC (Southwest Business Corp) and Lipari Foods (IBI Summit Presentation).
- ❑ Conducted Technology Assessments for Knights of Columbus, Staples Promotional Products, Bio Med Sciences, PA Department of Revenue and The UNIFI Companies.
- ❑ Provided staff supplementation services to Marling Leasing, Knights of Columbus, Black Knight Financial Services, General Motors, Loram Maintenance of Way, FAA, DOJ, DST Systems (PMF Services), Gordmans Department Stores (PMF Services), COTY, NYC HRA, American Express and more.
- ❑ Speaker at numerous Information Builders Summit events. Presentations were co-presented with clients and included Business Intelligence success stories, WebFOCUS 8 Portal success stories, Data Warehousing Tips & Techniques and other topical content.
- ❑ Served on the Computer Sciences Board of Advisors for Appalachian State University.
- ❑ Author of multiple white papers and articles.
- ❑ Established partnerships with Altosoft, Paris Technologies, Oracle, IBM, TTS Consulting and more.

July 1994 to September 2004 - Information Builders (IBI)

IBI is a privately held software company with Headquarters in New York City, and is known for its industry leading 4GL report writers and middleware. iWay Software accelerates e-business with products and services that rapidly integrate complex back-office systems. iWay was a privately held, wholly owned subsidiary of Information Builders.

Vice President of Product Development

- ❑ Picked to join a select team of Information Builders staff to launch iWay Software, formerly the Middleware Technology Division of Information Builders. Born on February 7, 2001 iWay reached 50 million dollars in revenue and was recognized by industry analysts as King of the Hill in the adapter market. Creation and aggressive use of the 250+ Adapters logo, along with “World’s Leading Adapter Vendor” tag line and the most comprehensive Web site in the industry have pushed the bar beyond the competition’s reach. iWay’s products made heavy use of Java/J2EE and SOA.
- ❑ Conceived, developed and launched the iWay Bio-Terrorism Response Suite, one of four vertical solutions offerings developed and brought to market in 2002. Installed at NYC DOH, the suite was named the #4 application in Info World’s Top 100 Applications for 2002.

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Vice President and General Manager, Data Management Solutions

- ❑ Directed a staff of 65+ developers, product managers, and quality assurance analysts. Charged to deliver product across three diverse product sets. Heavily engaged in all aspects of product development: Design & specification review, feature identification and prioritization, QA suites and standards, cross-product integration, bug review and prioritization, project planning, staff hiring and termination.
- ❑ Directed the development team for IBI's data warehouse suite, which includes ETL Manager (Extract, Transform & Load tool), Resource Analyzer, Resource Governor, Change Data Capture (Lakeview Technologies), ERwin modeling tool (Computer Associates), Metadata Manager and the Data Management Console. Assumed control of the product line and quickly directed a complete overhaul of the user interface. Reinvented the product by moving from a spreadsheet metaphor to a highly visual line & box data flow designer. Directed the design and development of Metadata Manager, a complete metadata management tool that offers object visualization and annotation, site impact analysis, object versioning and more. Since the product suite's renovation, ETL manager posted its best year in sales in '02 and the best Q1 in history for '03. Drives 15 million dollars in annual revenue.
- ❑ Charged to bring a new version of WorldMart to market, a financial reporting application based on a multi-dimensional database (IBI's FUSION). Java client application provided drag-and-drop manipulation of the data cube. Included a dashboard for KPI reporting and graphical rendering. Under my guidance, the Finance/JDE-centric solution was expanded to accommodate HR, Sales and Manufacturing from any data source. Templates were tailored for each customer, then loaded using IBI's own data warehouse tool. Groundbreaking technology at the time for IBI, technology in this product was a pre-cursor to WebFOCUS Dashboard.
- ❑ Charged to bring iWay's mobile computing offering to market. iWay's mobile suite combined vertical application templates for Palm O/S or Win CE hand-held devices (developed by NovaSync) with iWay's mobile middleware to deliver an end-to-end single vendor mobile computing solution. Core code-base shared across three vertical solutions – patient care, equipment service, and product sales. Partner Ship with Aether Technologies to provide the synchronization engine.
- ❑ In addition to product development across the above product lines, responsible for the product message provided to Sales and Marketing, partner/channel development, and field sales support (sales presentations and demos, collateral, Webinars, Executive Breakfasts, field sales and technical training, etc), press briefings, and more.

General Manager, Application Development Technologies Division.

- ❑ Directed a software manufacturing division of 30 people responsible for the development of Cactus, IBI's application development tool for Web and client/server business applications. In its first production year, Cactus drove 5 million dollars in annual product sales and over 20 million dollars in consulting. Later, was given responsibility for Desktop FOCUS, IBI's desktop reporting tool. Significantly overhauled the look and feel of the desktop product to make it easier and more intuitive to use. Recast the face of both products by combining the two separate desktop workbenches into what is now WebFOCUS Developer Studio.

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January 1987 to July 1994 – The Franklin Mint

The Franklin Mint, a world leader in the direct marketing of collectable items including plates, die-cast cars, dolls, and sculpture.

Director, Sales and Marketing Systems

- ❑ Director of a thirty-member I.S. staff dedicated to the development and support of The Franklin Mint's Sales and Marketing Systems. Responsible for The Mint's core systems for Sales Planning, Forecasting, Media Execution, and House List/Outside List Mailing. All systems developed in FOCUS.
- ❑ I.S. Quarterly Management Reporting consistently recognized the Sales and Marketing Systems Department ('91-'93) for on-time product delivery performance, adherence to budget, and lowest voluntary employee attrition.
- ❑ Catalyst behind the Franklin Mint's Integrated Systems Plan ("The ISP"), a corporate data repository.
- ❑ Responsible for the vision, selling the idea to Senior Management, and implementing the plan. Lead the team that modeled the Franklin Mint business to design the new account, order, exposure, promotion, price, and product data stores.
- ❑ The infrastructure of 160+ corporate DB2 tables consolidated three versions of account, order, and promotion information to a single data warehouse. In addition, economies from The ISP produced a reduction of full time I.S. resources.

June 1984 to December 1986 - University of Pennsylvania

- ❑ *Project Leader* for a four-person team for the customization and installation of Integral Systems, Inc.'s COBOL/NATURAL/ADABAS payroll package. Responsibilities included: alternative software study and purchase recommendation; specification of ISI code modifications; design of custom modules.

June 1981 to June 1984 - Delmarva Power and Light

- ❑ *Systems Analyst*. Led a five-person team that developed a FOCUS based human resource system. The Personnel Management System (PMS) was constructed using a project team staffed with non-I.S. personnel. Responsibilities included: 4GL alternatives study and purchase recommendation, code design & construction, in-house training, and technical support.

Education & Training

- ❖ Bachelor of Science degree, Indiana University of Pennsylvania; awarded 05/81.
 - ❑ Concentration - Management Information Systems (MIS)
- ❖ Graduate education courses, University of Pennsylvania's Wharton Evening School; 3.5 GPA.
- ❖ WebFOCUS 8 Training:
 - ❑ WebFOCUS 8.2 installed and configured on MS Surface Pro
 - ❑ WebFOCUS 501/502: Reporting Essentials using App Studio 1 & 2
 - ❑ WebFOCUS 510/511: Metadata Essentials using AppStudio 1 & 2
 - ❑ WebFOCUS 522: Reporting Essentials – Advanced Techniques
 - ❑ WebFOCUS 390: Self-Service Analytics using InfoAssist
 - ❑ WebFOCUS 521: Building InfoApps with AppStudio
 - ❑ WebFOCUS 363: Building Collaborative Portals with WebFOCUS