

Carolyn Jorgensen, M.B.A.
Microsoft Certified Expert

Objective:

To obtain a contract or permanent position in the areas of sales, budgeting, production, or finance designing or enhancing **advanced Excel and/or Access/SQL applications** such as sales configurator, product demand forecasting, production or headcount planning, budgeting, sales quoting tools or business specific databases. I have 9 years experience in telecom applications engineering; 14+ years in forecasting for major hi-tech, winery, and mortgage industries. To lead people using software and management skills in a variety of environments to help fulfill their objectives.

Skill Summary:

Software:

- **MS SQL Server Management Studio 9.0** (1/2 yr) including: tables, views, inner/outer joins
- **Microsoft Excel Certified Expert**, Visual Basic for Applications (**VBA 10+yrs**) including: Pivot tables, MS-Forms, FLEXGRID controls, Data Access Object (DAO/ADO), Excel templates, add-ins, and macros including .XLM (2+yrs). Visual Basic 6.0 (1 yr)
- **SQL server MS Access (13 + years)**, custom query designs including “back” and “front” end
- Oracle 8 uploads from Excel using VBA; various data warehousing solutions (3 + years)
- **Microsoft Office Suite** (13+ years)
- **Adobe Suite CS 3** Photoshop, Premiere, Illustrator, InDesign, Bridge, and Acrobat ACE training courses (2 yr)
- **QuickBooks Pro 6.0** (10+yrs)
- **Blackbaud eTapestry donor software, (1 + year)** implement new system for nonprofit, support and train users in data entry fundamentals in accounts and contacts, reports and queries, and mass updates and communication ; design training materials agency specific, track donations using queries, generate thank you notes for donors
- **Volunteer Hub scheduling software, (1 + year)** design web based schedule and format events, administer system, support volunteers via phone with training, generate reports

Internet:

- Microsoft Outlook 2003, Internet Explorer 8.0, Microsoft Network 5.0 ISP, e-mail distribution lists, sending file attachments and downloading files using modems and DSL equipment.

Operating Systems:

- MS-Windows VISTA, XP and NT

Foreign Languages:

- Fluent in Spanish, Brazilian Portuguese and French

Education:

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|---|------------------------------|
| ➤ Golden Gate University | M.B.A. |
| ➤ University of Illinois | B.S. Business Administration |
| ➤ La Escuela Oficial de Idiomas. Barcelona, Spain | Fluency in Spanish |

Publications:

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|--|-------------------|
| <u>Networking with 1-2-3</u> | Brady Books, 1990 |
| <u>Quick Guide to NetWare: For the Systems Administrator</u> | Brady Books, 1990 |
| <u>Mastering 1-2-3, Release 3</u> (a hands-on guide using Lotus 1-2-3) | Sybex Books, 1989 |
| <u>Mastering 1-2-3, Release 2</u> , 2 nd edition | Sybex Books, 1988 |
| <u>Mastering 1-2-3, Release 2</u> , 1 st edition | Sybex Books, 1986 |
| <u>Symphony For Your Business: Money Mgmt & Decision Making</u> | Hayden, 1985 |

Professional Experience:

GAP Inc, San Francisco (via TEK Systems) 2010-present

- Enhanced three net demand forecast tools using Excel VBA and data warehousing from internal databases.
- Work with large (50MB+) spreadsheet files streamlining formulas and design for efficiency.
- Update an automation tool used for division sales performance of online partners.

- Use of Excel formulas with MARS data downloads to integrate metrics data between multiple worksheets.
- Compute metrics for division/dept/class level reporting. Integrate metrics into WTD, MTD, QTD, STD and YTD reporting periods. Compile Top 30 product sales by division and entity (ONOL) for WTD, MTD and QTD periods. Extract Key Category net demand report for ONOL using a key code map.
- Developed macro to actualize data metrics for a given sales week window. Worked remotely with 3 user team.

SRCS, Santa Rosa**2010**

- Document procedures for Sungard e-Schools Plus(e-SP) student information system (SIS); analysis of state reporting requirements and data extraction using e-SP, SQL and Excel to tabulate
- Organize documents using MS SharePoint, perform “ad-hoc” queries using MS SQL Server Management Studio on e-SP tables and views

Santa Rosa Junior College Adjunct Faculty Pool**2009-present**

- Selected for CIS (Computer Information Science) department to teach academic courses in Microsoft Office Suite.

AcademyX, San Francisco (Direct)**2007- 2010**

- Basic, intermediate and advanced Excel and Access **VBA hands on group** training for students with a variety of programming, applications and business skills.

Thermochem Inc, Santa Rosa**2008-2010**

- Contract position to perform top down analysis of three existing database systems designed in Access used for lab information management (LIMS) with the goal to integrate to one system.
- Redesigned a comprehensive system to include lookup tables, linked forms, validity checks, reports and queries for three areas: bottle prep, check-in of bottles, and lab analysis and entry.
- Maintained documentation for the project and provided hands-on training for staff.
- Work with support office staff to collect and manage ongoing enhancements using version control.

Restoration Hardware, Corte Madera (via TEK Systems)**2008**

- Contract position to perform top down analysis of existing corporate Excel forecasting systems designed in Excel and Access used for 3 year forecasting, Goal to eliminate Access part.
- Redesigned a comprehensive system to include macro VBA programming to automate the various rollup levels from sub dept to dept to retail sub group to all retail.
- Maintained documentation for the project and provided hands-on training for staff.
- Work with key financial analyst to collect enhancements and manage those updated versions.

The following positions were part-time employment:***Jewish Family and Children Services, VITA Tax Coordinator 2007/2008 tax season***

- Trained, supervised, and scheduled 16 volunteers in conjunction with the IRS to use **TaxWise online software** to prepare electronic returns for low-income clients.
- Reviewed 250-300 returns in February, March and April, 20 hours per week. Corrected rejected returns when necessary. Maintained electronic permission to file paperwork for reporting.
- Maintained demographic statistics for grant funding in Excel.
- Work with agency support office staff scheduled appointments for clients. Certified by the IRS for Basic, Intermediate and Advanced tax preparation.

Habitat for Humanity of Sonoma County, Database Coordinator**2007-2008**

- Implement, manage and maintain eTapestry Benevon “Raising More Money” database of affiliate volunteer needs for site work, events, committee tasks, and other needs with requirements, qualifications, time commitment and contact person. Design groups using query. Send mass email to donor bases and generate statistical reports for fund raising.
- Create training materials in Word, Powerpoint and give courses to users of a variety of skills
- Track and enter data on volunteer contributions of funds, time and/or construction materials.
- Develop a web-based volunteer sign up system using Volunteer Hub s/w to place and schedule volunteers for construction projects in conjunction with staff input

- Create and update HTML website pages with information about volunteering and sponsor groups
- Attended national, regional organization sponsored training conferences and Global Village leadership training in areas of green building construction
- Led a Global Village group of 21 U.S. volunteers to Guaruja, Sao Paulo, Brazil to build homes

***Tax Service Plus, Certified Tax Preparer (CTEC) Santa Rosa* 2004-2007**

- Provide certified tax preparation to primarily Spanish speaking low and middle-income clients using Tax Act software. Products included RAL (Rapid Anticipation Loans), ERC, and ERD.
- Prepared electronic and paper returns for current and prior tax years.
- 15 years experience in schedules A, B, C, D, and E as well as 5 years experience in accounting for stock market trades. Preparation of W-7 forms for Internal Revenue Service for nonresident aliens, including review of required documents.
- Work with a team of tax preparers and front office staff.
- Obtained CTEC (California Tax Education Council) license and bond upon completion of a 60-hour certification course. Top producer in 2005 with a volume 250 returns in 12 weeks.

The following positions were contract employment:

***PayPal, San Jose (Robert Half International)* Q4 2004**

- Design and support forecasting tool **for worldwide sales and marketing** for all PayPal transactions incurred by market segment using Visual Basic for Applications (VBA) in Excel 2002. Tool generates using macros 1) data warehousing collection using pivot tables that connected to external databases, consolidated 32+ sub-files to three regional files, usage of very large data files (30MB+).
- Designed VBA code and modified template per ongoing requirements.
- **Worked onsite and remotely** via DSL modem using email/phone meetings.

***Intuit, Inc, Mountain View (Alphasoft)* Q2 2004-2005**

- Design and support budgeting tool **for senior financial analyst** used to provide labor and headcount planning using Visual Basic for Applications (VBA) in Excel 2000 for local engineering departments.
- Tool generates using macros 1) employee and contractor data sub files by department for user data entry, consolidates sub-files to one file, reformats final entries to **Oracle 8** format database monthly, and creates an Excel upload file for submission to a corporate database. Designed VBA code and modified template per ongoing requirements.
- **Worked remotely** via DSL modem using email/phone meetings.

***Business Objects, San Jose (DOC)* 2003-2005 (monthly)**

- **Remotely maintain and support** critical sales reconciliation tool using Visual Basic for Applications (VBA) in Excel 2000 for international sales offices. Tool uploads manual entries to Oracle database monthly from the remote countries into a corporate database.
- Maintained SQL VBA code and modified template per new requirements, tested uploads using **Oracle 8 remote connection**, developed new upload for product corrections and eliminations.
- Modified Class Modules, Forms and VBA functions monthly.

***Advanced Fibre Communications, Petaluma (Direct)* 1994-2005 (weekly)**

- Develop and support critical sales quote configurator tool using Visual Basic for Applications (VBA) in Excel 2000/97/95/5.0. Tool quotes customer equipment at the Central Office (LET) and up to 32 remote terminals (RST) following complex equipment configuration rules.
- Converted 20,000 line macros from Excel 4.0 (XLM) to Excel 5.0, creating user forms interface with pull down list boxes, radial buttons, and other objects and adding structured programming macros.
- Added editing capabilities that included allowing multiple revisions for quotes, multiple quotes for each customer, and generation of reports.
- Later in 1997, converted Excel 5.0 code to VBA and added additional functionality such as customized customer versions. Over 500 users including in-house sales support staff, company sales team, and external domestic, international, and government clients on IBM and Mac hardware used this tool.
- Integrated Access '97 database in 1999 using DAO interface in Excel VBA to allow users to read and write to Access files.
- Developed in-house tools for power configuration, installation quotes and computing ADSL broadband requirements calculation using Excel VBA add-ins and templates. ADSL configurator included GUI drag and drop interface, usage of Excel add-ins, templates, MS-Forms, and Flexgrid control.
- Designed a VB 6.0 application for telecommunications equipment cross connection.
- Acted as project manager for all projects and managed sub-contractors on specific tools.

Charles Schwab, San Francisco (K-Force)**Q1 2001-2004**

- Develop and support the Schwab Initiative Tracking Tool for the STech Enterprise using a system of Excel and Access files that are used to **track and forecast initiatives** by manager for employees and contractors. Initiatives are assigned to managers; managers are organized into Vice-President (VP) groups; VPs are organized into Senior Vice President groups (SVPs). This assignment and data entry for organization hierarchy is done in Microsoft Access, version '97 or higher.
- An Excel template was designed to facilitate user data entry of monthly time for employees and contractors with DAO and macro buttons to perform a “read” and “send” process to read/write the Microsoft Access database.
- Development of user and technical documentation as well as user training. Worked with Schwab Business Analyst and Access sub-contractor team to complete the project. Monitored monthly reporting cycle while adding user-defined features for 4 consecutive months.

Calix, Petaluma (Direct)**Q2 2001-2002**

- Develop and support critical sales quote configurator tool using Visual Basic for Applications (VBA) in Excel 2000/97/95/5.0. Tool utilizes extracted data from a Java-based configurator, adds JPEG images, subtotals, and links to an external Java database to import customer specific pricing.
- Created two versions of the tool to date. Develop two links for Finance to Pillar software to upload estimated shipments and actual shipments monthly. Data linked from Excel worksheets by customer and part number. **Developed a demand forecast model** using Excel and pivot table functions.

Partial Listing of Prior Clients/Agency Contact/Projects:***Chalk Hill Winery, Windsor (Direct)*****Excel marketing forecast*****Hewlett Packard, Santa Rosa (Manpower)*****Access/SQL database maintenance*****Hewlett Packard, Roseville (Manpower)*****Excel demand forecast*****Kendall Jackson Winery, Santa Rosa (Strada Corp)*****Lotus 1-2-3 production forecast*****Levi Strauss and Company, San Francisco (Modis)*****Lotus 1-2-3 financial budget vs actual system*****North American Mortgage, Santa Rosa (Strada Corp)*****Paradox database design*****UCSF, San Francisco*****Paradox database design*****Sun Microsystems, Palo Alto*****Training / budget development*****McKesson Corporation, San Francisco*****Desktop support**