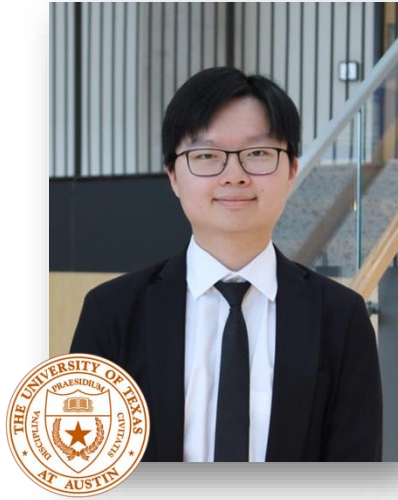


Business Analyst – IT Financial Solutions

Kevin Yao, Peter Le



Introducing the Intern Analysts



School: University of Texas at
Austin
Major: Canfield Business
Honors & Finance @
McCombs School of Business



School: University of Houston
Major: Computer Information
Systems @ Cullen College of
Engineering – Tech Division

Introducing the Team



Walter Vicente
Senior Manager
*IT Financial
Solutions*



Roger Tidey
Senior Solutions
Analyst II
Finance

People we worked/learned from:

- Bonnie Lee – Sr. IT Solutions Analyst, *Oracle Cloud ERP*
- Taylor Young – Sr. Solutions Analyst I, *SCM*
- Rajendar Madasi – Sr. Solutions Analyst, *Workday Adaptive*
- Vamsi Krishna - Solutions Analyst, *Blackline*
- Himanshu Chopra – Financial Solutions, *Manager II*
- Joel Rosa – Sr. Technologist II, *Peoplesoft Developer*
- Saumya Prakash – Manager II, *IT Solutions RPA*
- IT Financials Solution Team



Challenges? What Did We Learn in the Internship?

Challenges



- Learning
 - Adapting to the fast-paced learning environment and absorbing new terminology quickly
 - How everything works (the tools, systems, and processes etc.)
 - Grasp the “why” behind a task (why a report mattered or why a process was designed a certain way etc.)
- Projects:
 - Ensuring accuracy in the reconciliations while working with large datasets
 - Developing precise titles that reflect our reconciliation efforts between AR and AP
 - Troubleshooting technical issues in ticketing systems, such as transportation ID errors and expense report submission failures

Skills

- Microsoft Excel (5 Top Skills)
 - Pivot Tables, VLOOKUP, SUMIF, IF Statements, Conditional Formatting
- Microsoft Visio
 - Creating Workflow Diagrams
- GEP
 - Collecting Supplier/Invoice Data
- MESD
 - Worked on tickets involving issues like transportation ID errors and expense report failures



Excel

ManageEngine
ServiceDesk Plus

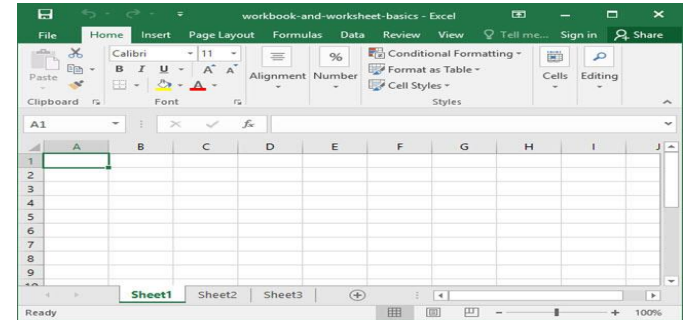
Skills

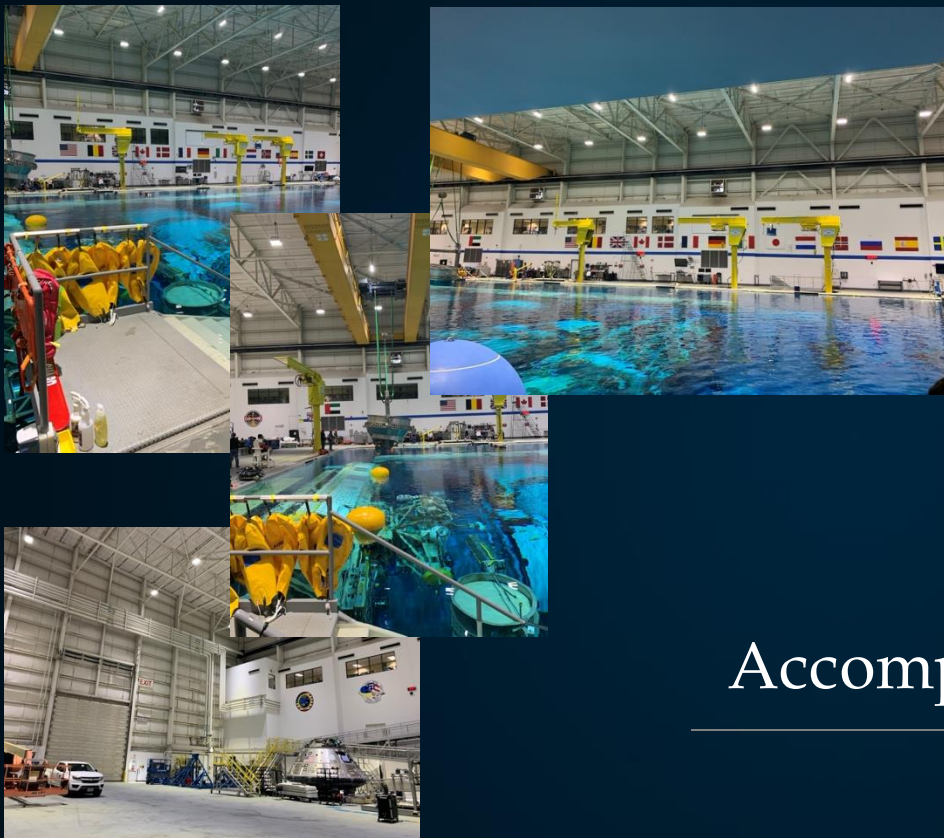
- Oracle Peoplesoft and SQL
 - Built custom queries to extract large datasets using a graphical interface (FSPRD, FSSUP)
 - SQL Offers more flexibility and control, especially for complex joins, filters, and data transformations
- Side Skills
 - Problem Solving & Root Cause Analysis
 - Communication & Collaboration
 - Presentation & Reporting
 - Time Management & Prioritization



Application

- Learned overview of IT processes, including agile methodology, SCM, Q2C (Quote to Cash), and P2P (Procure to Pay)
- Analyzed supplier data from GEP
- Built Peoplesoft Financials Queries
- Joined IT/Treasury meetings and gained exposure to bigger projects and how cross-functional teams communicate





Accomplishments? Future Plans?

Accomplishments

- American Eagle Invoice Audit
 - Identified and resolved discrepancies in invoice records, including missing entries/ data mismatches
- AdTech Error Analysis
 - Made custom queries and data analysis techniques to investigate errors, determining root causes
- Oceaneering Mobile Workforce (OMW) Reconciliations
- Peter taught an AP Clerk how to create a Supplier Reconciliation
- Kevin resolved an MESD ticket about an expense report issue and having the wrong source type
- Taught an AP Clerk to use Excel functions to validate Business Unit and Voucher ID consistency

Future Plans

- Background and Development
 - Came from a technical background in Computer Information Systems
 - Had limited exposure to business analysis and data interpretation prior to the internship
 - Being part of the IT Financial Solutions team gave me exposure to analytical work
 - Learned how decisions are made, problems are solved, and how teams collaborate
- Environment
 - Surrounded by professionals who were supportive and willing to mentor
 - Realized the importance of adaptability and continuous learning
 - More confident now in pursuing a Business Analyst career
- Next Steps:
 - Finish School
 - Pursue certifications to deepen my skills (ex. PMI, Oracle)



Future Plans

- What I enjoy doing day to day
 - Being part of the IT Financial Solutions team gave me a chance to see how things really operate behind the scenes (how decisions get made, how problems are solved, and how different teams work together)
 - Dig into data, understand processes, and try to help improve how things are run
- What environment I enjoy
 - Ask questions, learn from others, and contribute to something bigger than myself
 - Influenced the kinds of roles and companies I look for in the future
 - More confident now in pursuing a Business Analyst career
- Next Steps:
 - Finish School
 - Career as a Business Analyst or Consultant





our wonderful IT team!



houston dynamo!



Favorite Part of the Internship?

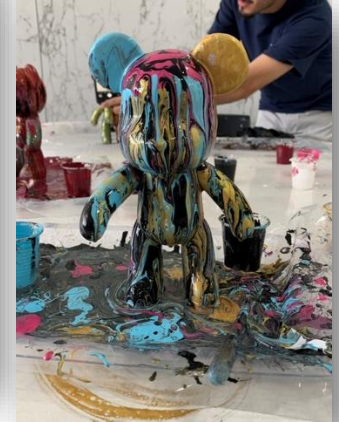
Favorite Part - Peter

- Chance to learn hands-on and face-to-face
 - Actively contributing with your mentor
 - Contribute to projects and help other teams (AP, Treasury, SCM, etc.)
 - Learned how to approach problems from both a business and technical perspective
 - Felt a sense of growth and purpose by being part of something bigger than myself
- Houston Food Bank
 - Helping out the community!
 - Volunteering
- Favorite Project: American Eagle Invoices



Favorite Part - Kevin

- Opportunity to learn by doing
 - Not just shadowing or observing
 - Contribute to projects and get to actually solve problems
 - More confident in my abilities and understand how things work in a real business setting
- Fete 832
 - Nice change of pace
 - Painting
 - Free Bearbrick
- Favorite Project: AdTech Payment Issue



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