

Alex Jamieson

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Profile

Experienced HiPortfolio business/systems analyst, with many years experience in

- relationship and project management,
- support/business analysis,
- system/UAT testing and
- user and procedural documentation.

Focus has been in support and administration of HiPortfolio with the primary industry experience within the Wealth Management sector.

Key Strengths / Capabilities

- Excellent presentation, interpersonal and communication skills, able to communicate with all levels in organisations from boards and senior management to junior staff members
- Strong problem analysis and resolution
- Able to work individually or in a team as required.
- Strong business and customer relationship focus
- Achievement oriented
- Able to work with in-house/outsourced/ co-sourced resource arrangements

Career Summary

Alex Jamieson Consulting Pty Ltd
Managing Director and Contractor

March 2005 - Present

Symetry Limited
Web (WRAP) Application Support Analyst

May 2004 – March 2005

Contractor – EDS/Westpac Mortgage Centre
Business Analyst

April 2003 – July 2003

Contractor – Barclays Global Investors
HiPortfolio Administrator/Business Analyst

April 2000 – February 2002

GIO Asset Management Ltd
Senior Application Support/Business Analyst

November 1996 – April 2000

Career History

Alex Jamieson Consulting Pty Ltd

March 2005 – Present

Contract – State Street Australia Limited (SSAL)

October 2007 – July 2008

- Assisted with the completion of the gathering and documenting of Client Business requirements for the BlueFish Phase 2 implementation.
- Conversion Manager BlueFish Phase 2 - to convert the Client data to the SSAL Enterprise format

Responsibilities included:

- The final gathering and documenting the Client Business requirements and Process mapping for conversion from the clients' redundant system to SSAL's Enterprise applications.
- Establishing, gathering, entering and validating the Static data required to convert the Client to Enterprise.
- Preparing project plans and participating to project meetings with both the local and "global" project offices.
- Providing static data setup for SQA, BUAT and CUAT testing environments.

Contract – EPA SA

June 2007 – Aug 2007

- Responsible for the gathering and documentation of user requirements to the Integrated Information System (IIS) for a new licensing fee structure.

Responsibilities included:

- The gathering and documenting the user requirements for changes to the Integrated Information System (IIS) for a new licensing fee structure.

Contract – ING Investment Management

May 2006 – Feb 2007

Responsible to act as the liaison between ING Investment Management (Owner of HiPortfolio) and ING Australia (Client) regarding the clients plans to rationalise their business using HiPortfolio functionality.

Responsibilities included:

- Project feasibility to completion of functional requirements for the HiPortfolio component of ING Australia to ensure compatibility with ING Investment Management.

Major Achievements:

- Completed system and End to end testing for a change to the cash allocation process from the INGA registry system generated files to be uploaded into HiPortfolio.
- Completed functional design and testing (system and end to end) for a project to upload existing tax parcels maintained on a manual spreadsheet to existing portfolios (funds) in HiPortfolio.

- Completed minor projects for ING IM operations for checking international dividends ex details maintained in HiPortfolio, funding details spreadsheet and intranet review including html code corrections.

Department of Families and Communities

December 2005 – May 2006

Completed and audit of the Dept of Families and Communities (SA) internet site to Web Content Accessibility Guidelines (WCAG) priority 1 (Level A).

Responsibilities included:

- To provide first and second audit reports on the DFC web site against the WCAG Level 1.

Major Achievements:

- Report indicated both non conformance and observations against the WCAG and suggested solutions. Report resulted in DFC commissioning a new web site.

Symetry Limited

May 2004 – March 2005

Web (WRAP) Application Support Analyst

May 2004 –Mar 2005

The purpose of this role was to provide support for the WRAP application provided by Avanteos. The role had a direct report to the CEO and was also responsible to reduce the amount of outstanding issues between Avanteos and Symetry.

Responsibilities included:

- Analyse, report and monitor issues arising from the WRAP application supplied by Avanteos
- Analyse, report and monitor service level agreements to ensure compliance reporting non compliance to management.
- Ensure statutory reporting completed with time requirements.

Major Achievements:

- Reduced outstanding issues from approx 600 to approx 70 in less than 12 months
- Implemented and change to issue reporting process to ensure a more robust and timely process allowing individuals and department supervisors to be able to monitor their outstanding issues.

Contractor – EDS/Westpac Mortgage Centre

April 2003 – July 2003

Business Analyst

Apr 2003 –Jul 2003

The purpose of this role was to provide As Is analysis for a new processing project.

Responsibilities included:

- Analyse and report the “as is” process for document issued and branch processing.

Contractor – Barclays Global Investors

April 2000 – February 2002

HiPortfolio Administrator and Support Analyst

Apr 2000 –Feb 2002

This role was to provide support and administration functions for the HiPortfolio application.

Responsibilities included:

- General HiPortfolio administration functionality.
- Business and system analysis of issues found and business requirements.
- Testing of patch and version upgrades including project management, documentation, reporting and tracking of issues found during testing, as well as change management and implementation.
- Documentation of Business Continuity and Disaster Recovery plans for the HiPortfolio application

Major Achievements:

- Implemented HiPortfolio running on Windows 2000 Server with a server upgrade including the implementation of the Pervasive SQL 7.0 upgrade to Pervasive SQL2000.
- Analysis and documentation, updating Unit Pricing procedures including flowcharting cost sheet processes to ensure that other in-house systems could accurately locate data.
- Project management of software upgrades - system testing and User Acceptance Testing (UAT) of HiPortfolio including documentation and problem resolution from Version 3.0 to Version 3.2 and then up to version 5.0.
- Successfully implemented the upgrade from Btrieve 6.15 to Pervasive SQL 7.0, which was required urgently as file limits had been met under Btrieve.
- Prepared and updated Business Continuity documentation for HiPortfolio.
- Prepared and documented the HiPortfolio Disaster Recovery Plan (DRP).
- Documentation of Upgrade procedures for HiPortfolio within Barclays Global Investors Australia Limited. This included both Patch and Version upgrades defining the roles and responsibilities of all parties involved within BGIA.
- Created a training document and ran several training/information sessions on HiPortfolio for those new to the product and those wanting to know what it did.
- Attending and participating in HiPortfolio Advanced User Group (AUG) meetings, taking up sponsorship of AUG projects including providing business requirements for AUG projects.

This role was to provide support and administration functions for the HiPortfolio application.

Responsibilities included:

- Supporting HiPortfolio (Asset Management software), CHESSE (PATH), OASYS, and pricing sources, Information Express, Datastream (ASCII pricing), Bridge/DFS (Iress), Bloomberg and Reuters (ASCII pricing).
- Problem analysis and resolution of both user and product issues.
- Managing of software upgrades, system testing and User Acceptance Testing (UAT) of HiPortfolio including documentation and problem resolution.
- Installation and upgrades of Pervasive SQL (Btrieve) database software used by HiPortfolio.
- Preparing and updating Business Continuity (BCP) and Disaster Recovery Plans (DRP).
- Attending and participating in HiPortfolio Advanced User Group (AUG) meetings, taking up sponsorship of AUG projects.

Major Achievements:

- Integration of GAML HiPortfolio database to AMPIA HiPortfolio database within the required time constraints.
- Successfully ensuring that OLAS (general Ledger) files could be loaded to the GIO Mainframe from AMPIA.
- Assisted with successfully relocation of GAML staff to AMPIA premises and ensuring that each user was able to connect to both AMPIA systems and to GAML using Citrix Metaframe.
- Prepared and tested Business Continuity (BCP) and Disaster Recovery Plans (DRP) negotiating with the various external vendors the recovery arrangements.
- Tested HiPortfolio and associated 3rd Party interfaces for Year 2000 Compliance within the given time constraints.
- Using Reuters and Bloomberg's links provided ASCII files for both Foreign Exchange rates and Forward Foreign Exchange points to be priced in HiPortfolio replacing the previously manual operations.
- Successfully created a file to upload Foreign Exchange rates in the Group General Ledger system – OLAS ensuring rate continuity across the GIO Group.

- Coordinated and successfully implemented the publication on the Intranet, the month end Foreign Exchange rates which replaced the system where these rates were e-mailed throughout GIO.

Earlier Career Summary

DST International Pty Ltd. 1994 – 1996

Consultant – Impart/2 and Uptix

Contractor 1993 – 1994

Lotus Consulting

Westpac Banking Corporation 1989 – 1993

Asset Supervisor – IBG Technology
Accountant – Wholesale Currency Services
Business Systems Analyst – Westpac Consulting

Manpower plc 1988 – 1989

Temporary Worker – Various International Banks

Parsoft Limited 1988 – 1988

Developer/Programmer/Analyst – Today 4GL

Lincoln House Computer Services Limited 1987 – 1988

Programmer/Analyst – COBOL

CC Banking Personnel 1986 – 1987

Temporary Worker – Various International Banks

Bank of New South Wales/Westpac Banking Corporation 1975 – 1985

Bank Officer – General Banking, Foreign Exchange and International Banking.

Computer Skills/Knowledge

Courses:

Kepner Tregoe Project Management
HiPortfolio – Various Courses
Westpac Project Management Approach (WPMA)
Structured Design Workshop
Influential Project Manager
Introduction to Data Modelling

Operating Systems:

Windows XP (Home and Professional)
Windows 2000 Server
Windows 2000 Workstations
NT Server 4.0
NT Workstation
Novell Netware 4.11
Pervasive SQL 2000i

Software:

HiPortfolio/2 16 Bit and 32 Bit
PATH (Cathox) Ver 4.17
OASYS
Datastream
Iress
Bloomberg
Reuters
MS Office
MS Project
Citrix Metaframe
Html + CSS
Dreamweaver 8

Excellent Referees Available on Request