

Kathy Bateman

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Work Experience – as relates to Databases / VBA / Systems

IT Consultant

2/2009 – Present Self-Employed, DC Metro area

- Used VBA to write custom application to track sales forecasts in Excel
- MySQL / Crystal Reports
- Microsoft Access / VBA programming
- Teach Microsoft Office classes, including Beginner, Intermediate and Advanced levels of Microsoft Access (versions 2007, 2003, and 2000)

Senior IT Project Manager

9/2007 – 2/2009 The Center for Audit Quality, Washington, DC

Hands-on manager of all IT projects for small organization with mid-size information technology infrastructure.

- SQL Server 2005 – Systems Administrator
- Obtained Microsoft Certificate of Achievement in *Maintaining a Microsoft SQL Server 2005 Database*
- Wrote application in Microsoft Access to track Member Alert mass mailings. This program allowed its user to select one or more previous mailings by simply clicking on them from a list, then push a button, and the program would automatically generate the html code for presenting this list in a specific, consistent format which could be used as a list of references in future mailings or on a website. The program also generated the text version of this same list of references.
- Utilized a combination of Access and Excel to merge together targeted lists of individuals for importing into a mass mailing software system, automatically updating any pre-existing email address entries.
- Designed the underlying data structures (in SQL Server 2005) for a customized customer relationship management system. Designed and coded front-end as a Microsoft Access *project* which automatically connected to the SQL Server database.
- Designed the underlying data structures (in SQL Server 2005) for a customized help desk solution.

Volunteer project for Sailing Club of Washington

December, 2006

Designed and programmed an Access database to track invitations, rsvp's, menu selections, and billing information for the annual dinner / dance. The system tracked rsvp's along with the associated dinner entrée requests, and generated an automated listing to be provided to the caterer. In addition, the system provided a cost reconciliation report which showed the charged amounts (dinner and dance portions were billed separately, and member / non-member rates were different) and the collected amounts, and reconciled any differences. The system also produced placecards for the table – these cards included not only the attendee's name, but also a visual picture of the dinner entrée that was ordered – this was especially useful for non-English-speaking servers.

IT Specialist

12/2003 – 9/2007 U.S. Securities & Exchange Commission, Washington, DC

Served as project liaison between the business division and Information Technology division for enhancements to the major software system utilized by the Office of Investor Education and Assistance. Examples of database projects include:

- Various database applications development utilizing ODBC, Visual Basic for Applications (VBA) and Microsoft Access
- Data mining involving complex SQL queries into a relational Sybase database. The primary tool used for this was Microsoft Access, utilizing a combination of VBA and SQL Pass-through Queries. This data mining delivered information to management, that was otherwise unavailable.
- Developed "PhoneLog" application using Microsoft Access with VBA and pass-through queries to a Sybase back-end database. The business problem presented itself when the division in which I was working expanded to encompass another division as well. This business change was going to result in a 100% increase in volume of phone calls handled by staff attorneys, but with no increase in number of staff. Prior to this business addition, the volume of correspondence (including phone calls, web form submissions, faxes, and letters combined) was over 75,000 per year, all of which were tracked in a custom-built correspondence management software system. This system was somewhat cumbersome and did not lend itself well to data entry in "real-time" due to the number of screens which had to be visited to accurately capture all required data – for one phone call, this process could easily involve at least 5 or more

data entry screens. I developed an add-on system in Access, which allowed its user to capture this same information in one user-friendly screen, even if the master database server was down. The user could capture all their phone correspondence in “real-time” and then at the end of their shift review all information to make sure it was complete and accurate. At that time, (s)he pressed a button and the information was automatically uploaded into the master database in Sybase, a verification report was produced for their records, and tracking information was captured in local Access tables for performance reporting.

- Utilized Microsoft Access (VBA and SQL pass-through queries into a Sybase database) to generate numerous management reports that analyzed performance of their staff. These procedures examined the underlying data and produced reports which identified areas in which approved procedures were or were not being followed in terms of accurately and consistently capturing data, as well as statistics regarding resolution times.
- Utilized Microsoft Access (VBA and SQL pass-through queries into a Sybase database) to generate numerous senior management reports that provided information for our Director to use when speaking to members of the media or at seminars, creating the division’s Annual Report, or for placing statistical information on our official website
- Created and enhanced Crystal Reports template for producing quarterly “Rogue Broker Report.” Its user would input criteria of interest, and a query would be made against the Sybase data, thereby generating the desired report from which its user could perform further research.
- Parsing XBRL / XML data for use in internal statistical reporting.
- Reviewed and provided input for numerous system certifications, audits, security policy documents, risk assessments, disaster recovery plans, and other associated requirements.
- Access database program for reading incoming email requests received from an online form submission, for processing requests for publications. Program also generated inventory pick-lists, shipping lists, and mailing labels, as well as maintaining history.
- Assisted with writing request for proposal for public FAQ system, reviewed its responses, assisted with selection process, and provided methodology for statistical monitoring of results of the final decision. This statistical monitoring included using Access to tap into the data stored in Sybase along with emails coming into a specific Exchange mailbox, and formulating comparative conclusions.
- Troubleshooting reports and universes created in Business Objects.
- Worked with Enterprise Architecture group to ensure that all data fields from existing relational database for custom correspondence management system would map into the overall Enterprise Architecture being planned for the entire agency
- Developed Access database system to automatically capture information from an extensive online index which listed hundreds of documents that were on one particular section of our website. This information was then presented in various fashions to facilitate the review and edit process that was being undertaken on this section.

Adjunct Faculty

2001 – 2003 Piedmont Virginia Community College, Charlottesville VA

Taught beginner, intermediate, and advanced level courses in Microsoft Word, **Microsoft Access**, Microsoft Excel, PowerPoint, Microsoft Project, Microsoft Outlook, and general Internet. Course formats included 1 or 2 day classes, and were taught both for Open Enrollment as well as for contract courses for specific businesses or agencies.

President

9/1993 - 12/2003 Bateman Solutions, Inc., Charlottesville, VA

- **AHIP’s Housing Rehab database program** – I designed, coded, implemented, and trained it users on this system. The program tracked various information about the agency’s clients who applied for assistance, including parameters which factored into their calculated “level of need.” The program also tracked the grants that were used by the agency for funding this assistance, and captured the specific criteria parameters each grant required for determining client eligibility. The database then allowed inquiries and reports to be generated, which produced a list of prioritized client eligibility for the various grant programs. As criteria changed or new grants were added, these calculations were automatically updated and the lists automatically re-prioritized as necessary. Existing projects were tracked as well. I also built in a custom search screen where the end-user could enter searches in “plain English” and code would automatically be generated “behind the scenes” to perform advanced searches into the data. The Housing Rehab program benefited the agency by a) greatly reducing the potential for error in calculation of a client’s “neediness;” b) eliminating the need to perform manual calculations and re-generate lists every time a grant’s criteria changed or a new grant was added; and c) reduced by a factor of literally *days*, the time it took to respond to ad-hoc inquiries related to special assistance opportunities.
- **MTRS** (include all phases of development, including installation, training, speaking at seminars, etc) – This database system allowed its user to capture all the automobile accident-related data involved in a crash. All data from the standard VA state police accident form was captured. Numerous statistical reports were available to assist with analyzing this data. MTRS was used by most police departments throughout the state of Virginia, and two police

departments in the state of Nevada. My responsibilities included primary database developer/programmer, systems analyst, on-site installation and training, and speaking at various police seminars throughout the state of Virginia. See:

http://www.smartsafeandsober.org/news/SSSNews/BBBB/Spring_02.pdf (pages 8 and 11)

<http://www.doe.virginia.gov/VDOE/Finance/VAPT/0602nslt.pdf> (page 4)

- Converted data from a custom database within an old, outdated contact management system, into 2 separate, newer components – Goldmine for the contact management portion, and Mas90 for the accounting portion (at that time a suitable consolidated system for both was unavailable on the market)
- Functioned as analyst and sole database developer for various Goldmine add-ons for a telecommunications test equipment (hardware and software) company. This particular database included over 20,000 contacts. Examples of some of the add-ons I created (as analyst and sole developer) include:
 - Add-on to import contact information received from trade shows. My client would present demonstrations at trade shows, then bring back a comma-delimited file containing contact information for potential clients who visited their booth. My import program read in the text file, and presented the information in a temporary list, where its user could sort through and filter out any contacts who were not actual leads in terms of potential sale. The user could also push a button and look up the lead in their existing contact list. In addition, the user could use this temporary list as a “working list” and set flags such as – a) automatically generate an email to the person, based upon a template; b) automatically generate a tickler item to remind someone to contact that lead. Once the user worked through this list in a quick, easy-to-use manner, they pushed a button and everything happened automatically – requested contact information was automatically imported into the contact management (Goldmine) system, any requested emails were automatically generated, and requested tickler items set. The system also allowed the user to create and modify the associated email templates.
 - Add-on to interface the Goldmine contacts with their corresponding entries in the Mas90 accounting software.
 - Program to automatically generate labels and inventory-related information for volumes of demo products they shipped.
- Assisted staff at a medical facility, with creation of an Access database program to track their employee training. A staff member had already begun the work on this database, but required professional assistance with completing it and resolving various technical issues.
- Functioned as analyst and sole developer for an Access database program for managing all contracts at a small airport
- Used Access to update data in a large-scale police department, so that malformed data would no longer interrupt conversion process into newly developed system
- Functioned as analyst and sole developer utilizing an Access database for the Accreditation program for police department
- Functioned as analyst and sole developer to use Visual Basic to create a Document Management program for the attorney’s office within a local city government
- Created reporting system in Microsoft Access for a local retail store who could not get everything they needed out of the reporting capabilities built into the Great Plains accounting software system. I accessed this information via ODBC within Microsoft Access to produce the more enhanced reporting required.
- *Numerous* projects for *large-scale* banks and other financial institutions. These were programming contracts where I functioned as a senior developer on a team, using a custom tool, Cross Sell Manager. The projects always included some combination of querying the host data at the bank (deposit accounts, loans, etc that were housed on a variety of mainframe systems), performing lookups against systems such as Chex, placing orders with vendors who sell paper checkbooks/covers/etc, and making inquiries into one or more credit bureaus.
- Analyst and sole developer for Access database program utilized by the Human Resources department of a local city government. This program was used for processing benefits Open Enrollments. It captured data from a variety of external systems. It automatically generated notices to all employees, that open enrollment season was beginning, and supplied them with information regarding their current benefits elections. It provided data entry screens so that new elections could be entered. As the open enrollment period was drawing near its end, it would automatically generate notices to employees, informing them of any changes that were about to occur with their benefits, and requesting validation of these changes. Once the open enrollment period concluded, notices were sent to any employees who had requested changes, and all change information was uploaded to the various external systems for processing.
- Resolved database problem with local city government’s website which was not pulling in complete information from the underlying database. Coding was done in Java.

Tools utilized (as relates to databases and associated work) include:

- Visual C++ and 'C'
- FoxPro and Visual FoxPro
- Microsoft Access
- Cross Sell Manager P/L
- Clipper
- Butler SQL, 'C'
- Visual Basic and Several Visual Basic "look-alikes"
- dBase III+
- Crystal Reports
- InstallShield
- Business Objects
- PVCS Version Control

Types of Clients: City government; non-profit organizations; banks (across the United States); attorneys; software/hardware communications development company; management consultant; artist; physicians; retirement community.

Computer Specialist

8/1992 - 9/1993 Insurance Institute for Highway Safety, Ruckersville, VA

Responsible for all aspects of microcomputers at this location. Database work included programming in Clipper, dBase, and C; documented systems developed in-house; data conversion; conversion of existing applications, and development of new ones.

Manager of System Services (promoted from Design Analyst)

11/1988 - 8/1992 Berman Technologies Corp., Charlottesville, VA

Project analysis and design; supervise Systems Services Department responsible for providing project design and technical assistance to outside developers, developing installation and other utility programs, developing user and technical documentation, developing training courses and manuals, training end users and distributors, liaison between end users / distributors and in-house programming staff, and software error analysis. Design and program application demonstrations which are distributed with CSM; provide technical support to distributors on an International level -- including but not limited to analysis and enhancement of their design (on both a software and system level), communications troubleshooting, integration of CSM with various other software and hardware, and basic user support; liaison between BTC and their support groups; programming (in 'C') device drivers to interface CSM with other software and hardware; liaison between end users and distributors, and the BTC programming staff.

Applications Programmer

11/1987 - 11/1988 Checkfree Systems, Inc., Westerville, OH

- Apartments Rental Management EFT (Electronic Funds Transfer) Processing
Converted application from mainframe system into PC-based system. This system maintained a list of apartment residents, along with the associated billing information, and performed the necessary processing to generate and track electronic funds transfer of rent payments.
- Health club front desk / point of sale / management
Project manager. Oversaw database programming consultant who was creating this system. The software included front-desk functionality, as well as processing to generate and track electronic funds transfer of membership dues.
- Checkfree Home Banking
Hands-on project manager. Oversaw database programming consultants who were creating the system; personally programmed utilities to pass the home banking bill payment information to the mini computer from which the electronic funds transfer process was performed; programmed utilities to retrieve funds processing results from the mini computer and pass them back into the home banking software.
Conducted high-level presentations of this system, with the president of the company
- Converted programs written in COBOL, Pascal, and OCL into Clipper database applications
- Converted large-scale, existing data from mini computer, into dBase databases for use by systems newly developed in Clipper.

Applications programming in Clipper (both new systems and conversion of systems which had resided on a mini-computer -- converted Pascal, COBOL, and OCL to Clipper); applications development; some user support and training; conversion of pre-existing applications; supervising external consultants in software development projects; liaison between all Departments and levels as relates to software development; giving product demonstrations to the public. Project manager

for software applications projects - Health Club front desk processing; Checkfree EFT software; Apartments Rental Management EFT Processing .

Personal Computer Analyst

10/1985 - 11/1987 Mid America Federal Savings & Loan, Columbus, OH

- Marketing department databases – Functioned as analyst, developer, and system administrator for several databases
- DDA (Demand Deposit Accounts) database (Gateway / SIM/SQL, dBase III+, DOS batch files) – Functioned as analyst and sole developer of complex database processing for monthly reconciliation report of DDA accounts. This project occurred during a time period when interfacing systems was not automatic, and a large amount of “creativity” was required. I utilized SIM/SQL to download data from the host system, dBaseIII+ to perform the import into the database and perform various data manipulations, Lotus 1-2-3 to present the data, and DOS batch files to manage the performance of the entire process. This system reduced the monthly time requirements for the DDA department’s Vice President, from 2 full days to just under 2 hours. Parallel processing was performed the first few months to validate data, which reconciled to the penny every time.
- Portfolio Analysis spreadsheets in Lotus 1-2-3 – Functioned as analyst and sole developer of complex Lotus 1-2-3 spreadsheets to assist with portfolio analysis. The employee who had been performing this function was previously consistently working over-time to produce all the required reports; after implementing the system I developed, she was able to eliminate most of her overtime work.

Plan and design system enhancements and modifications; conduct personal computer applications development including GateWay (Micro-to-Mainframe link); PC software / hardware training of all levels of personnel (on both an individual and group basis) -- software packages included WordPerfect, dBase III+, LOTUS, Super Project Plus, Profiles PC, and various "special-needs" packages; design and implement PC control systems, procedures, and data forms; determine hardware and software needs of all levels of employees; evaluate application problems with software and provide technical support on hardware and software; establish appropriate software and hardware standards; dBase programming.

Education

Virginia Tech, Blacksburg, VA

- Worked toward B.S. in Mathematics; fields of interest in Computer Science and Philosophy (Logic Theory).

Other

- Numerous training sessions regarding Systems Security, Privacy guidelines and regulations, and other required courses
- Attended Eye Tracking seminar for web developers
- Fall, 2006: System administration training in ImageNOW
- Spring, 2006: Attended conference regarding Section 508 Compliance
- C++ programming course (Piedmont Virginia Community College)

Awards

- Numerous awards for chairing Jaycees projects.
- May, 2007: Chairman's Award for Excellence - Seniors Initiative Team (U.S. Securities and Exchange Commission)
- July, 2007: Occupant Emergency Program - Certificate of Appreciation (U.S. Securities and Exchange Commission)

Personal

- Active member of Fairfax Volunteers for Change
- Active member of two sailing clubs. Did volunteer database development for one of them, in regards to management of their annual dinner/dance
- Hobbies include sailing, ballroom and Salsa dancing, and gourmet cooking
- Member of the Smithsonian Resident Associates
- Member of the Kennedy Center
- Served multiple terms on the Board of Directors for the Charlottesville-Albemarle Junior Chamber of Commerce
- Chaired numerous charity projects, ranging in sizes from small to large
- Brownie Scout troop co-leader when my daughter was young