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Tim Regan

Financial Reporting Lead | Workday Financials

Tim is a multi-disciplinary professional with (18) years of experience working in technical and consulting roles supporting enterprise software and technology implementation. He holds the new **Workday Pro Financial Reporting Services Certification** and is a well-rounded and senior resource who is up to speed not only with the newest Workday Reporting features, but also with the inner workings of the Workday Object Model as it relates to creating efficient and effective report definitions and solutions.

Tim has experience working with Workday clients on building and modifying complex reports and financial statements like Budget vs. Actuals, Balance Sheets, Trial Balance Reports, and aggregating costs by various dimensions using Advanced, Matrix and Composite Reporting. He has also created and modified Dashboards with a wide variety of worklet types and tasks to suit different requirement sets and audiences. In addition, he has created Discovery Boards to support ad-hoc and visualization-based data analysis and trending.

His years of technical consulting and IT experience in different platforms spanning almost 2 decades results in context, perspective and the ability to design performant reports that leverage the capabilities that the Workday platform has to offer. He brings extensive insight into current and future report design and performance from both a functional and technical perspective. Tim adheres to Workday best practices when it comes to leveraging indexed data sources and fields in the system to optimize report performance wherever possible and works with his clients to effectively solution requirements with system features and limitations driving the strategy and recommendations.

Tim has worked on all sides of SaaS implementations (client-side, partner-side and vendor-side), working with senior leadership, technical teams, end-users, and developers/integration specialists to solution both functional, technical, and business asks.

In addition, Tim has extensive cross-functional experience in designing complex composite reports, creating calculated fields, adhering to existing security setup and best practices for report delivery, and building condition rules/logic in filters and other condition grids in Workday. Tim has contributed to security design and configuration and has successfully troubleshoot and addressed security-related issues encountered by users as they arose. He has also met with internal auditors to evaluate potential segregation of duties problems and other internal controls.

Tim's Workday Reporting capabilities and general system knowledge are complemented by his broad technical knowledge of both software and hardware as well as his leadership experience and soft skills. He holds a degree from the University of Toronto, a Microsoft certification and has multiple professional leadership certifications including the Ivy Academy Emerging Leaders program and Building Collaboration in and among teams from Schulich Business School at York University. He has done everything from building computers to leading helpdesks, IT teams, implementations, Business Intelligence and Report creation and designing processes for both technical and non-technical users.

He treats his client successes as his own and acts as a true business partner. He is passionate about producing high quality reporting solutions for his clients

Consulting Experience

Baptist Health System	Workday Financials Reporting Lead Builds Dashboards, Composite, Matrix & Advanced reports for different workstreams and provides leadership and oversight on financial reporting, Office Connect Installation, Configuration & use and Security Troubleshooting/Configuration. Experience includes: <ul style="list-style-type: none">• Offering executive guidance on project timelines and expectations• Liaising with FDM consultants during setup/architecture by giving reporting examples to support clients in making preferred FDM decisions• Conducting report design, solutions review and testing sessions with the client• Configuring custom reports for unique scenarios• Documenting best practice and configuring Workday to meet specific client requirements• Inbound & Outbound EIBs: Experience supporting automated and manual mass data loads, data transformation & extraction for compliance reports and other data sharing needs with external systems and stakeholders.• Strategizing reporting transition plans including knowledge transfer, report intake processes, and security configuration of client's reporting team• Managing reporting and calculated field inventories, establishing best practices for clients• Leading reporting discovery sessions to explore enhanced reporting solutions• Developing unique reports to meet specific client requirements and leading follow up meetings after reports have been thoroughly tested
SRA Lab	Senior Reporting Consultant - Workday Designed and Solved Payroll Costing & Award based reports. Involved in restructuring FDM and security to align with client reporting needs and building new and optimizing existing reports to better meet the needs of the user community for each respective project.
J.S. Held	Senior Business Consultant - Cority Led multiple software Implementations providing technical and functional consulting services. Areas of expertise included Security, Interfaces, Application Configuration, Automations, Data Analysis, Queries, Functions, Advanced Dashboards and Visualizations, and artificial intelligence (LLM's, Prompt engineering, neural network weight and parameter analysis and model training)
Public Services Health and Safety Association	Lead, Business Technology Operations Built roadmap for how to use, navigate, and leverage existing and new software, SaaS applications and knowledge management tools post-delivery to create efficiencies and improvements for the organization. Established and executed a new Learning Management System Implementation, combining analytical, operational, and strategic expertise. He led multiple cross functional teams on concurrent initiatives, including reporting on team progress and accomplishment across the organization.



Cority

Senior Technical Consultant

Worked on 20+ global/enterprise-wide implementations from start to finish. Tim managed multiple complex projects and received awards and accolades for strong leadership and dedication to success. He also built and configured report queries, logic rules, advanced conditional logic, and dashboards for clients in multiple countries.

Industries

- Higher Education
- Government
- Healthcare & Insurance
- Technology
- Financial Services
- Energy
- Mining
- Nonprofit

Skills Summary

Workday Reporting

- Composite Reporting
- Advanced Reporting
- Matrix Reporting
- Dashboard Design
- Discovery Boards
- Calculated Fields
- Financials
- Configurable Security
- Software Documentation
- AP Reporting
- Grants Reporting

Engagement Experience

- Application Development
- Fit/Gap Analysis
- Business Process Reengineering
- Configuration
- Unit Testing
- End to End Testing
- User Acceptance Testing
- Report Migration

Relevant Software

- Microsoft Office (Excel, OneNote, Outlook, PowerPoint, Project, Word, Visio, Teams)
- Microsoft 365
- Microsoft Intune
- Microsoft Entra (Azure AD)
- Microsoft Sharepoint
- Microsoft Defender
- Microsoft Power Platform
- Smartsheet
- SharePoint
- Azure
- Various Learning Management Systems (TalentLMS, Litmos)



Other Accomplishments

- Education**
- University of Toronto, HBA, Philosophy
- Training**
- Workday Reporting
 - Advanced Workday Reporting for Financials
- Certifications**
- **Workday Pro Financial Reporting Services Certification** (Workday)
 - **Microsoft 365 Identities and Requirements (70-346)** (Microsoft)
 - **Ivey Emerging Leaders Program** (The Ivey Academy)
 - **Building Collaboration Within & Across Teams** (Schulich School of Business/York University)
 - **Certified GX2 Platform Administrator** (Cority Software, Inc.)