St. Lawrence College

Position Description Form (PDF)

Effective Date: July 31, 2023

Campus:	**Brockville, Cornwall, Kingston, Hybrid, or Fully Remote**
Incumbent's Name:	**Vacant**
Position Title:	**Finance Business Systems Analyst**
Pay band:	**J**
Position Number:	
NOC Code:	
Hours per Week:	**35**
Supervisor's Name and Title:	**Wendy Plant, Manager PeopleSoft Finance**
Completed by:	**Wendy Plant, Manager PeopleSoft Finance Systems**

Incumbent: ______________________________ Date: ________________

(Indicates the incumbent has read and understood the PDF)

Supervisor: ______________________________ Date: ________________

One-Over-One: ______________________________ Date: ________________

Instructions for Completing the PDF

1. Read the form carefully before completing any of the sections.

2. Answer each section as completely as you can based on the typical activities or requirements of the position and not on exceptional or rare requirements.

3. If you have any questions, refer to the document entitled "A Guide on How to Write Support Staff Position Description Forms" or contact your Human Resources representative for clarification.

4. Ensure the PDF is legible.

5. Responses should be **straightforward and concise, using simple factual statements.**

Position Summary

Provide a concise description of the overall purpose of the position.

Under the direction of the Manager, Peoplesoft Finance, the incumbent provides functional support to end-users, troubleshooting and analyzing problems or issues, maintenance and enhancement of all Peoplesoft processes for the Finance System and related business functionality (e.g. bolt-on applications; third-party software etc.) within the Financial Services Department.

Utilizing strong knowledge of accounting and finance operations, the incumbent participates in the analysis, design, development, testing, and validation of financial systems. The incumbent works with end-users and other Peoplesoft Business Analysts and Information Technology staff to gather functional information and translate that information into detailed business requirements, functional specifications, test plans, end-user training materials and procedural documentation that will assist in process improvements, assessing the need for implementation of maintenance packs and version upgrades.

The Finance Business Systems Analyst is expected to be analytical, process focused, highly detail-oriented and have excellent communication skills.

Duties and Responsibilities

Indicate as clearly as possible the significant duties and responsibilities associated with the position. Indicate the approximate percentage of time for each duty. Describe duties rather than detailed work routines.

	Approximate % of the time Annually*
Financial Systems Operational Support & Maintenance ***Operational Support*** • Provides application support for Finance end users for Accounts Payable, Accounts Receivable, Purchasing, Budgeting and General Accounting. • Troubleshoots, analyzes, documents, and resolves production issues. • Liaises with system vendor representatives as necessary to resolve issues. • Designs and develops end user reports and queries, including NVision. • Understands the internal and external data sources, data files, data flows and integration of PS Financial systems with other systems within the College. • Escalates unresolved issues to the Manager, Peoplesoft Finance. • Responsible for firefighter tasks with respect to Vendor updates in PeopleSoft. • Conducts review sessions with business stakeholders to validate documentation and understanding of the issue and the requirements. • Provides expert functional knowledge of the Peoplesoft Finance application and implemented modules. ***Maintenance*** • Creates, modifies and inactivates chartfields. • Adds new chartfields to trees and assists with performance of tree audits. • Ensures the maintenance of user security profiles and approves/denies Financial systems access requests in consultation with Finance Director/Assoc Directors. • Performs periodic audits of Financial systems accesses.	30%

System Testing and Configuration • Responsible for the testing of any implementation of application fixes, updates, upgrades and new functionality. • Identifies, documents and performs and or coordinates test cases that need to be performed to ensure system performance prior to live implementation. • Reviews new application fixes and updates to recommend bug fixes for current process issues/failures, understands the impact of the updates that will be applied as part of the Critical Patch Updates driven by IT for system vulnerabilities. • Collaborates with PeopleSoft Finance Manager, developers, module SME's in the testing of new functionality. • Documents, analyzes, researches and manages issues and defects found during user acceptance testing and ensures appropriately addressed. • Prepares functional specifications representing detailed user requirements. • Conducts software testing to validate performance against specifications using various testing methodologies. • Ensures effective integration with existing applications and software systems.	30%
Process Improvements and Upgrades • Researches PeopleSoft functionality and proposes options for process improvements within Accounts Payable, Accounts Receivable, Purchasing, Budgeting and General Ledger functions. • Responsible for applying general knowledge and understanding of financial accounting, policies and procedures when recommending or designing business processes. • Ensures written requirements are clear, understandable, audience-appropriate, and accurately capture critical information required for a quality solution that meets business needs. • Analyzes and models the current state of system process flow, then overlays the new technical requirements to create a future state model and determine how financial processes need to adapt. • Prepares functional specifications representing detailed user requirements and business requirements. • Plays an integral role in project implementations including planning and coordinating, design, testing, implementation and closeout phases.	20%

<u>Financial Systems Documentation and Training</u> • Develops training materials and resources for end-users of the Financial systems. • Delivers training in small group sessions as well as on an individual basis to financial system end users. • Documents and updates as required all current financial business processes and financial system controls and process flow.	10%
<u>Project Management</u> • Under the direction of the Manager, Peoplesoft Finance the incumbent assists in the determination and prioritization of projects required to successfully complete the department's goals and objectives, and/or process improvements. • When required, act in a Lead capacity to effectively determine action plans, timelines and required resources.	10%
	100%

* To help you estimate approximate percentages:

½ hour a day is 7%

1 hour a day is 14%

1 hour a week is 3%

½ day a week is 10

½ day a month is 2%

one day a month is 4%

1 week a year is 2%

1. Education

A. Check the box that best describes the **minimum** level of **formal** education required for the position and specify the field(s) of study. Do not include on-the-job training in this information.

- ☐ Up to High School or equivalent
- ☐ 1-year certificate or equivalent
- ☐ 2-year diploma or equivalent
- ☐ Trade certification or equivalent
- ☒ Three-year diploma/degree or equivalent
- ☐ 3-year diploma/degree plus professional Certification or equivalent
- ☐ 4-year degree or equivalent
- ☐ 4-year degree plus professional Certification or equivalent
- ☐ Post-graduate degree or (e.g., Masters) or equivalent
- ☐ Doctoral degree or equivalent

Field(s) of Study:

A minimum of a 3-Year Diploma/Degree in Business Administration, Accounting, Information Systems Technology, Computer Science, or other related fields is required.

B. Check the box that best describes the requirement for the specific course(s), Certification, qualification, formal training, or accreditation in addition to and not part of the education level noted above and, in the space, provided, specify the additional requirement(s). Include only the requirements that would typically be included in the job posting and would be acquired before the commencement of the position. Do not include courses that are needed to maintain a professional designation.

☒ No Additional requirements	
☐ Additional requirements obtained by course(s) of a total of 100 hours or less	
☐ Additional requirements obtained by course(s) of a total between 101 and 520 hours	
☐ Additional courses obtained by course(s) of more than 520 hours	

2. Experience

Experience refers to the minimum time required in prior position(s) to understand how to apply the techniques, methods, and practices necessary to perform this job. This experience may be less than experience possessed by the incumbent, as it refers only to the minimum level required on the first day of work.

Check the box that best captures the typical number of years of experience, in addition to the necessary education level required to perform the responsibilities of the position and, in the space provided, describe the type of experience. Include any experience that is part of a certification process, but only if the work experience or the on-the-job training occurs after the conclusion of the educational course or program.

☐ Less than one(1) year	
☐ Minimum of one (1) year	
☐ Minimum of two (2) years	
☐ Minimum of three (3) years	
☒ Minimum of five (5) years	Minimum of 5 years of experience in a PeopleSoft Finance Business Analyst role including production support, application upgrades, or continued enhancement of an ERP system. Working knowledge of financial accounting systems/processes and their proper functioning - standard business accounting practices, financial reporting and internal controls, accounts payable/receivable, banking processes, etc. Technical expertise in PeopleSoft Finance 9.2 modules including GL, Accounts Payable, Accounts Receivable, Purchasing, Expenses, Cash Management.

	Experience in building reports using PeopleSoft reporting tools (query, Crystal and nVision). Experience with systems implementation processes and practices, and test execution. Ability to write functional specifications. Effective problem-solving skills and highly organized. Proficiency with computer applications and related software: MS Office Suite (Word, Excel, Powerpoint, Project); Internet; email (Outlook). Excellent communication skills (written/verbal). Experience with PeopleSoft Application Designer, Microsoft SQL Server, writing scripts, executing for issue resolutions an asset. Experience working independently and in a team environment, planning, organizing, and prioritizing work to meet deadlines. Experience in negotiation and conflict resolution while working effectively with various people, including other ERP Functional Application Owners, ITS staff, clients, communicating with technical and non-technical staff. Experience dealing with sensitive and confidential information appropriately and keeping with the College policies related to confidentiality and the Protection of Privacy (FIPPA).
☐ Minimum of eight (8) years	

3. Analysis and Problem Solving

This section relates to the application of analysis and judgment within the scope of the position.

The following charts help to define the level of complexity involved in the analysis or identification of situations, information or problems, the steps taken to develop options, solutions or other actions and the judgment required to do so.

Please provide up to three (3 examples of analysis and problem solving that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

	#1 regular & recurring
Key issue or problem encountered.	The incumbent will work on multiple production issues in multiple modules and ongoing projects involving different test systems concurrently. As a result, the incumbent is subject to frequent interruptions that require quick adjustment from one task to another.
How is it identified?	By users, new requirements/changes arise, or bugs appear in existing ERP processes. Issues logged by Finance Users in the ITS ticketing system.
Is further investigation required to define the situation and/or problem? If so, describe.	Yes, typically, to identify the problem's cause and its implication on the Finance department or integrated PeopleSoft systems. Analysis and testing solutions to determine the cause and resolution of the issue and/or issues. Recommended fix will be documented and migrated into production and where required assistance from the module SME to confirm the issue has been resolved prior to migration into PRD.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Discussions are held with the SME's for the affected modules to determine the effects of the problem and solution or to discuss the new specification and its impact on business processes. Finally, a review of the solution result needs to be tested.

What sources are available to assist the incumbent finding solution(s)? (e.g., past practice, established standards or guidelines.)	Personal past experiences and detailed knowledge of the applications are the largest sources of assistance. The Finance module SME's, Manager of PeopleSoft Finance and contacts made at other institutions and vendors are another. The IT Development team is available to help conduct research and code solutions. Oracle Customer Connect for logging SR's and viewing other SR fixes. Online documentation (PeopleBooks) is available to help learn how functionality should be configured and used.

3. Analysis and Problem Solving

	#2 regular & recurring
Key issue or problem encountered.	Assesses the issue reported by the User for example – the AP Voucher Build process has errors and has not created the expected voucher. The incumbent must review the error log and error present on the Voucher Quick entry page. The problem could be one of several errors but for this example we will refer to an Integration Broker (IB) error. Upon reviewing the error messages and IB it was determined that there was an address mismatch between Campus which is the data source and Finance where the refund is created. Appropriate error resolution is determined and actioned and allows the voucher build to be rerun and reconcile that the issue has been resolved and the refund voucher created. This activity could occur multiple times depending on how many transactions have failed.
How is it identified?	A user reported the Voucher Build process has produced errors that the User is not able to resolve. After analysis, the incumbent discovered the error occurred at the integration step.
Is further investigation required to define the situation and/or problem? If so, describe.	Yes, it had to be confirmed that it is a problem that requires a fix that is outside of the SME User's access and expertise. The problem would be analyzed, identified and an immediate fix implemented so the Refund process could be continued and completed by the SME User. The issue and resolution are documented for auditability and reference for any future issues of this nature. A more permanent fix is logged with IT to make identified changes to the IB handling of transactions.

Explain the analysis used to determine a solution(s) for the situation and/or problem.	Thorough review of Process Procedural Document, Online error message review, data review, SQL queries, Integration Broker error review, to determine where and when the error occurred and what caused it. Incorrect business processes are occasionally the cause; the User is asked to duplicate their actions to ensure they follow proper procedures and use acceptable parameters. Other factors taken into consideration are recent changes to the application or the environment the application is running on. No recent changes had been made to the delivered processes since the last time they were run. The incumbent confirms that the correct parameters were used, and the same results were produced when the process (if possible) was executed.
What sources are available to assist the incumbent finding solution(s)? (e.g., past practice, established standards or guidelines.)	The Finance Module SME's, the PeopleSoft Finance Manager, and other Finance managers. Experience in conducting research, reading code. Sites (e.g., HEUG.org, Oracle support) are available to help the application's customers find resolutions to known problems or log new ones. Online documentation (PeopleBooks) is available to help learn how functionality should be configured and used.

#3 regular & recurring

Key issue or problem encountered.	During Upgrade Project testing which included an application version upgrade including a Peopletools version upgrade.
How is it identified?	During the testing phases the incumbent has encounter functionality issues in core custom business processes.

Is further investigation required to define the situation and/or problem? If so, describe.	Yes, the incumbent must deep dive and research the best way to resolve the issues. All customizations have been documented following Business Requirement and Functional Design specifications. These documents would be the first point of review to determine if the break is due to missing components of the custom retrofit steps. The Incumbent would then work with IT Development to work through the resolution, retest and sign off if the issue has been resolved.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	The incumbent would review the issue and all documents available to determine the next steps. The Incumbent would work with the ITS Developer to ensure that the required retrofit is done. Testing verification of the solution would then be completed to confirm the required results.
What sources are available to assist the incumbent finding solution(s)? (eg. past practice, established standards or guidelines.)	The Functional Module SME's and other contacts made at other institutions and vendors. Experience in conducting research and code solutions. Sites (e.g., HEUG.org, Oracle support) are available to help the application's customers find resolutions to known problems or log new ones. Online documentation (PeopleBooks) is available to help learn how functionality should be configured and used. In this case, the incumbent primarily used their implementation experience to troubleshoot and knowledge of the application's customizations to understand the cause and resolution of the reported issue.

3. Analysis and Problem Solving

#1 occasional (if none, please strike out this section)

Key issue or problem encountered.	The incumbent would be a major participant in their ERP Modules during Oracle Bundle

	Applications, Major Version Upgrades, or Patches/fixes/upgrades. They are knowledgeable of all customizations and will lead or participate in all upgrade phases, including the analysis, functional specification design, testing, and implementation. In addition, the incumbent is required to review and determine the impact of any module-related patches and fixes and system upgrades.
How is it identified?	The executive committee agreed that SLC should upgrade the current ERP version to achieve sustainability.
Is further investigation required to define the situation and/or problem? If so, describe.	A team of the incumbent, Application Owners, ITS Management, and other technical and senior members from SLC will be created. In addition, if required, a study (Fit Gap) will be conducted on any functionality in the update that may impact as-is business processing. Also, suppose PUM updates are in the scope of the update. In that case, the incumbent will provide the module leads information around the new functionality Oracle has added to the system in the update. The Application Owner may then decide on a course of action to leverage these updates to add ROI to business processes.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Detailed analysis is required to understand the resource collisions and challenges of the same resource requirement dependencies when developing a project plan. In addition, the incumbent requires a good relationship with ITS, open communication among key stakeholders and team players. Spreadsheets and database queries will be used to identify and track the progress of all customizations impacted, additional functionality within scope of the project and completion of all testing included in the iteration test plans. In addition, the incumbent will take part and lead discussions, including proposing

	alternative options or considerations to configuration and business process changes.
What sources are available to assist the incumbent finding solution(s)? (e.g., past practice, established standards or guidelines.)	Through previous upgrades, existing project templates, implementation guides, and functional and technical documents exist as examples. Also, existing SLC SharePoint document repositories, external websites, and internal institutional knowledge can be used for reference.

#2 occasional (if none, please strike out this section)

Key issue or problem encountered.	Investigate reported data inconsistencies and functionality issues/concerns reported by Subject Matter Experts.
How is it identified?	Queries can be built to assist in the triaging of the data inconsistency issues that have been reported. Based on the query results, a potential solution can be identified and depending on the severity, SQL scripts may be required, Oracle cases opened if Vendor assistance is needed or IT Development may need to be engaged to assist with the resolution.
Is further investigation required to define the situation and/or problem? If so, describe.	Yes, the incumbent would need to determine the source of the problem, i.e. system configuration, errant batch system/transaction process, or some other trigger.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	The incumbent would need to study the data inconsistencies to determine if there is a root cause or pattern. Additional data queries may be required to be written. For example, the incumbent is required to know the various batch procedures that relate to the business cycles and timelines. This information would be used to narrow the possible sources of error. A proof of concept, testing, and outcome for the procedure to correct the data would be documented and presented to module SME’s

	and PeopleSoft Finance Manger prior to migration to the production environment. The incumbent is responsible for ensuring that Inter-department fixes are coordinated and completed.
What sources are available to assist the incumbent finding solution(s)? (e.g., past practice, established standards or guidelines.)	Experience in conducting research and code solutions. Sites (e.g., HEUG.org, Oracle support) are available to help the application's customers find resolutions to known problems or log new ones. In addition, online documentation (PeopleBooks) is available to help learn how functionality should be configured and used.

4. Planning/Coordinating

Planning is a proactive activity as the incumbent must develop in advance a method of acting or proceeding, while coordinating can be more reactive in nature.

In the following charts, provide up to three (3) examples of planning and/or coordinating that are regular and recurring to the position, up to two (2) examples that occur occasionally:

#1 regular and recurring

List the project and the role of the incumbent in this activity.	Oracle Bundle Application or Major Version Upgrades – Patches/fixes/upgrades testing, training, and implementation. The incumbent must review with the PeopleSoft Finance Manager, ITS System Administration team to determine the impact of any module-related patches, fixes, and system upgrades. In doing so, the incumbent must consider the changes to various integration points/impacts. In consultation with the PeopleSoft Finance Manager, the incumbent must develop a plan for implementation, including timelines for each stage (planning, new development, verification/testing, training) of the project. In conjunction with the plan, the incumbent must work with the database administrators, system analysts, application developers, and other Module SME's to coordinate testing sequencing and develop/modify test scripts to ensure rigorous and exhaustive testing. The incumbent must also document all issues, unit testing scenarios, and results. Depending on the bundle level or upgrade level, the incumbent will also be responsible for providing training and job aids to the Functional Application Owners for new or changed functionality.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	The incumbent must have strong time management and organizational skills to ensure that the project progresses smoothly and within

	strict deadlines. In addition, strong communication skills are required to articulate tasks and their fit into the overall project.
List the types of resources required to complete this task, project, or activity.	Bundle and Upgrade documentation and release notes: PeopleBooks, Oracle Customer Connection and Higher Education User Group websites. Examples from previous upgrades, existing project templates, implementation guides, and functional and technical documents are examples. Existing SLC SharePoint document repositories, external websites and internal institutional knowledge can also be used for reference.
How is/are deadline(s) determined?	Deadlines are established based on the upgrade scope or bundles applied and any post-upgrade training that may be required. The college community will dictate the deadlines with input from ITS, Human Resources, Financial Services, Student Services, and the Academic Schools.
Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples.	The incumbent evaluates the changes and proposes options for the affected functional module(s). The incumbent will identify potential impacts on other departments. Major shifts, such as offloading some of the incumbent's workload, would be referred to the PeopleSoft Finance Manager.

4. Planning/Coordinating

	#2 regular and recurring
List the project and the role of the incumbent in this activity.	Function as the module team leader for the implementation of new Module functionality. Example: A requirement is identified by the Associate Director of Finance to implement market Rate calculations for our USD transactions. The incumbent will be required to attend/organize meetings with the Accounts Payable (AP) users to scope the module requirements for the additional functionality. For example, if this is the first time the for implementing a specific solution. Analysis of any online, batch and business processes affected must be completed and communicated to the AP team. Development of unit test scenarios for the proposed solution will be required. Collaboration with the Module SME to develop the Test scenarios. Work with the AP Team to communicate the migrations to the PRD environment.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Anticipates potential problems, areas, and concerns that need to be addressed before implementing the changes. Coordinating tasks among with the Subject Matter Expert, and Associate Director of FinanceAP.
List the types of resources required to complete this task, project, or activity.	The incumbent requires robust analysis, communication, and triaging skills. Expertise in overall ERP concepts and module-specific data, ERP (PeopleTools) objects an asset. Reach out to other institutions to inquire about industry best practices if required depending on the extent of the functionality being implemented.

How is/are deadline(s) determined?	Deadlines are determined through negotiations with the incumbent, the PeopleSoft Finance Manger, Module SME.
Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples.	If changes/solutions implemented can be improved by suggestions identified by the incumbent, the incumbent would provide supporting information to the Associate director and Module SME for approval.

#3 regular and recurring

List the project and the role of the incumbent in this activity.	The incumbent will work with the Project teams (technical team, Module SME's, functional users, external consultants) responsible for completing specific tasks such as: implementing new modules, new module functionality or creating the Business requirement documents to specify the change or improve integrations between the other applications.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	From time to time, conflict resolution is required. The ability to conceptualize solutions and convey them to the IT Developer, PeopleSoft Finance Manager and Application Owners. Project plans are sometimes used to track progress when multiple projects are underway. A clear path of the communication plan is required between all members for quick/efficient problem resolution and progress notification to the Project Team and Sponsors.
List the types of resources required to complete this task, project, or activity.	The incumbent is required to develop written specifications that range from business requirement documents (BRD's) Functional Specifications documents, Fit Gap analysis. Research is often conducted using Finance Procedural documents, ERP manuals, PeopleBooks, SQL Query and PeopleSoft Query. MS Project is used when project plans are required Visio or similar software tools to

	document business processes or develop program logic flow.
How is/are deadline(s) determined?	Typically, deadlines are identified by the PeopleSoft Finance Manager, Application Owner or ITS Management that requested the project. Either way, the incumbent is required to negotiate/juggle existing or future deadlines based on priorities and available resources.
Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples.	Often, changes are requested that could significantly impact how something will be done. All changes need to be reviewed to ensure they are within the original project's scope or whether the change is required to ensure the project's success. It's the incumbent's responsibility to identify the full impact of all changes to the project and, through discussions with the team members, arrive at a solution that determines if and when the changes can occur. Failure to meet some deadlines could result in the College incurring thousands of dollars in expenses or penalties.

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4. Planning/Coordinating

	#1 occasional (if none, please strike out this sections)
List the project and the role of the incumbent in this activity.	As the Functional Business Analyst for various modules in the ERP system, the incumbent is consulted on the integrity and configuration of system processes to ensure alignment with department business procedures. The incumbent will assist in changing /adding configuration and proof of concept to establish this alignment. This configuration is the backbone of the ERP Finance System.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Since other ERP modules access the baseline configuration tables, any changes to these core rules must be planned and coordinated across all Module owners. For example, an institutional decision to change college signing authority will result in new approvers rules, new effective dating to Approval Workflow Framework (AWE) configurations, Approval Origin paths and modification to Requisition queries currently in place to incorporate the rules. The timing and coordination of changes to the ERP system needs to be coordinated across several Finance teams and impacted Users in the College. The incumbent is responsible for consulting on the sequence/order in which the changes must occur and impacts other department timelines. This consultation requires a high level of attention to detail and accuracy. The incumbent requires excellent verbal and written communication to verify that all data is current and request changes or clarifications for configuration choices and cross-module impact.
List the types of resources required to complete this task, project or activity.	Resources include using and analyzing ERP objects, SQL query tools, specific module base level configurations, functionality, and table structures. Analytical skills to research and understand College business processes and their effect on

	the ERP systems.
How is/are deadline(s) determined?	The incumbent works with ITS System Administration Teams, Development Team and the Application SME's, to meet the Project goals and priorities. Depending on the size and scope of the project, deadlines are determined by the availability of project staff, tech systems, and timing within the overall demands of the College at large.
Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples.	The incumbent functions in collaboration with PeopleSoft Finance Manager and the Application SME's to provide a solution in most situations. If the incumbent cannot resolve the issue or it involves policy changes or staffing issues, the difference would be referred to Director of Finance

#2 occasional (if non, please strike out this sections)

List the project and the role of the incumbent in this activity.	
What are the organizational and/or project management skills needed to bring together and integrate this activity?	
List the types of resources required to complete this task, project or activity.	
How is/are deadline(s) determined?	

Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples.

5. Guiding/ Advising Others

This section describes the **assigned responsibility** of the position to guide or advise others (e.g., other employees, students). Focus the actions taken (rather than the communication skills) that directly assist others in the performance of their work skill development.

Though support staff cannot formally "supervise "others, there may be a requirement to guide others using the incumbent's job expertise. This is beyond being helpful and providing ad hoc advice. It must be an assigned responsibility and must assist or enable others to be able to complete their own tasks. Check the box(es) that best describe the level of responsibility assigned to the position and provide an example(s) to support the selection, including the positions that the incumbent guides or advice.

Regular & Recurring	Occasional	Level	Example
☒	☐	Minimal requirement to guide/ advise other. The incumbent may be required to explain procedures to other employees or students	A function of this role is to assist in communicating and translating functional business requirements as identified into a technical blueprint (GDD) used for the development team.
☐	☒	There is a need for the incumbent to demonstrate correct processes/ procedures to others so that they can complete certain tasks	The incumbent is responsible for assisting the module SME's with the maintenance of Procedural documentation and ensuring any potential changes effected by ERP upgrades are included.
☒	☐	The incumbent recommends a course of action or makes decisions so others can perform their day-to-day activities.	The incumbent will analyze ERP system issues affecting users and develop solutions/options to propose to the PeopleSoft Finance Manager and Module owners for any required changes or assistance with solutions.
☒	☐	The incumbent is an active participant and has ongoing involvement in the progress of others with whom he/she has the	The incumbent is expected to analyze system functionality and recommend options for the best course of action for others. The incumbent is required to prototype, configure, and test ERP

		responsibility to demonstrate correct processes/procedures or provide direction.	proof of concept options for Module Owners.
☐	☒	The incumbent is responsible for allocating tasks to others and recommending a course of action or making necessary decisions to ensure the tasks are completed.	In the Functional Business Analyst role, the incumbent coordinates testing for Module SME and creates Azure tickets where the development team is required to perform a task. The incumbent will provide guidance to Finance Team members and maintain a list of pending activities of required tasks. In addition, they will regularly have check-in discussion for progress tracking and perform quality checks on the testing results before implementing solutions.

6. Independence of Action

Please illustrate the type of independence or autonomy exercised in this position. Consideration is to be given to the degree of freedom and constraints that define the parameters in which the incumbent works.

What are the instructions that are typically required or provided at the beginning of a work assignment?	
Regular and Recurring	Occasional (If none, please strike out this section)
A discussion takes place with PeopleSoft Finance Manager, Module SME's before the start of the project. There is a great deal of autonomy given to the incumbent to research, recommend options, and take action to implement the preferred solution chosen by the Finance Team.	None.

What rules, procedures, past practices or guidelines are available to guide the incumbent?	
Regular and Recurring	Occasional (If none, please strike out this section)
Discussions with vendors or user manuals help provide technical details. PeopleSoft Finance Procedural and Process documents. Past project documentation, Oracle Knowledge Base, other Functional Business Analyst. The incumbent will be required to create GDD documentation for ITS Development, Functional Specifications documents translating as needed for ITS Technical Requirements for customizations that need change, upgrade, or maintenance. Project plans are used to outline deadlines, tasks and resources.	None.

How is work reviewed or verified (e.g. Feedback from others, work processes, supervisor)?	
Regular and Recurring	Occasional (If none, please strike out this section)
A very high degree of responsibility is given to the incumbent to check their work. In addition, the incumbent is expected to bring any issues to the PeopleSoft Finance Manager promptly and appropriately to discuss solutions. Analysis and design work is to be iteratively reviewed with the PeopleSoft Finance Manager before implementation to ensure that the users' expectations and requirements have been met.	None.

6. Independence of Action

Describe the type of decisions the incumbent will make in consultation with someone else other than the supervisor.	
Regular and Recurring	Occasional (If none, please strike out this section)
The incumbent regularly consults with PeopleSoft Finance Manager/Module SME Owners about changes to ERP that may affect existing business rules and processes. They will research proposals and present the to the PeopleSoft Finance Manager and Module Owners as options for meeting new business requirements, reports, functionality, or when attempting to find a solution to resolve a problem that affects the system's integrity in a production environment.	None.

Describe the type of decisions that would be decided in consultation with the supervisor.	
Regular and Recurring	Occasional (If none, please strike out this section)
The incumbent often is faced with competing time conflicts and Resource requirements within the Module SME's, ITS System Administrator and ITS Development Team. However, decisions on requests beyond our established guidelines, policies, or exceptions to the rule will require supervisor consultation. Issues requiring policy decisions and sensitive or technical matters beyond the scope of the position will be documented by the incumbent and presented for consideration to PeopleSoft Finance Manager and the Module Owners.	None.

Describe the type of decisions that would be decided by the incumbent.	
Regular and Recurring	Occasional (If none, please strike out this section)
Independent judgment and problem-solving are integral to the analysis process. When the incumbent deals with system changes or maintenance tasks, they are accountable for ensuring that the maintenance is performed correctly. All changes are thoroughly tested, completed in a timely manner, well documented and meet the user's expectations. Creativity is required in identifying alternate solutions or potential customization solutions. The incumbent is responsible for system integrity. Therefore, all sensitive information, whether acquired directly or indirectly, must be confidential and not discussed at any time.	None.

7. Service Delivery

This section looks at the service relationship that is an assigned requirement of the position. It considers the required manner in which a position delivers service to customers. It is not intended to examine the incumbent's interpersonal relationship with those customers and the normal anticipation of what customers want and then supplying it efficiently. It considers how the request for service is received and the degree to which the position is required to design and fulfill the service requirement. A "customer" is defined in the broadest sense as a person or groups of people and can be internal or external to the College.

In the table below, list the key service(s) and its associated customers. Describe how the request for service is received by the incumbent, how the service is carried out and the frequency.

Information on the service		Customer	Frequency
How is it received?	How is it carried out?		(D,W,M,I)*
Carry out and communicate progress on individual objectives as negotiated with supervisor.	Weekly team meetings are used to provide progress updates. Calls, chat, and email is used when it's too urgent for weekly meetings.	Supervisor when determined	W
Triage Production issues, document cause and resolution. Create Azure tickets for IT when solution requires a migration through PHIRE	Ticket is log in the AZURE ticket system.	Finance Department	D
Responsible for the firefighter role to correct historical data where required. Must ensure there is no transactional data tied to the original data, and determine where effective dating should be used	Request is received from the AP Analyst with the required changes. Email is used for auditing purposes.	Accounts Payable Team	M M I
Coordinate and conduct the analysis of business requirements to design and develop potential Customizations that	Translation of business requirements to functional/technical ERP requirements.	Functional ERP Application Owners PeopleSoft Finance Manager	D I

meet the Finance Business requirements. Provide advice on issues related to current ERP systems or new development of ERP systems.	Designs and configures reports and queries to satisfy the requirements. Creates functional Specification and GDD's for new development or project reinstates. Creates testing scenarios/plans on prototype ERP proof of concept examples to meet business requirements. Required to assist Module SME's with system integration, user acceptance, and dry testing during Project implementations.	Finance Department ITS Development Team	

* D = Daily W = Weekly M = monthly I = Infrequently

8. Communication

In the table below indicate the type of communication skills required to deal effectively with others. Be sure to list both verbal (e.g. exchanging information, formal presentations) and written (e.g. initiate memos, reports, proposals) in the section (s) that best describes the method of communication.

Communication Skill/Method	Example	Audience	Frequency (D,W,M,I)*
Exchanging routine information, extending common courtesy	A discussion takes place with various Module SME's, Superuser's outside of the Finance Department before starting a project or changing organizational critical reports. Gathering ERP requirements and information to gain a complete understanding of a current issue/problem/project whose approved solution is technical.	Module SME's, Finance Associate Directors, Finance Director. IT Systems Team and Development Team Members CIBC Tech's and Account Representatives	D M I D W
Explanation and interpretation of information or ideas.	Discuss, suggest, and document approaches for resolving sensitive issues that could impact payment to Finance Vendor. Provide information on the impact of proposed ERP changes to PeopleSoft Finance Manager, Finance Associate Directors, Director of Finance if projects or delays would significantly impact the College. Provide project status, reporting, or seek technical assistance and product knowledge – can occur through email exchange, phone, or direct contact.	Module SME's IT Systems Team Members ERP Development Team	D M I D W

Imparting technical information or advice	Provides and receives information relating to PeopleSoft Finance Application. Verbal communication and written GDDs are provided to Development Team and Application owners for transparency for customization and design elements.	Module SME's IT Systems Team Members IT Development Team	D I D I
Instructing or training	Provide training as requested for new ERP delivered functionality or customizations – this can be as simple as providing detailed transaction instructions via discussion, email, Teams or through more formal workshops, i.e., development of training modules.	Finance Department Users, College Users	I M I
Obtaining cooperation or consent	Discussions are held with ITS Management and Application Owners to identify the project's scope and expected results and sometimes to define team members' roles. Coordination of sign-off and migration for unit testing. When issues arise, the incumbent must enlist the cooperation of other Finance ERP Users for project requirements, design, and testing.	Functional Module SME's ERP Development Team Finance Administration Team	W W I
Negotiating			

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9. Physical Effort

In the tables below, describe the type of physical activity that is required on a regular basis. Please indicate the activity as well as the frequency, the average duration of each activity and whether there is the ability to reduce any strain by changing positions or performing another activity. Activities to be considered are sitting, standing, walking, climbing, crouching, and lifting and/or carrying light, medium or heavy objects, pushing, pulling, working in an awkward position or maintaining one position for a long period.

Physical Activity	Frequency (D,W,M,I)*	Duration			Ability to reduce strain		
		< 1 hr at a time	1-2 hrs at a time	> 2 hrs at a time	Yes	No	N/A
Sitting at computer station	D			X	X		
One position for long period	D			X	X		
Keyboarding/Mouse	D			X	X		
Back/Neck/Should/Wrist from keyboarding and working at a computer station	D			X	X		

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If lifting is required, please indicate the weights below and provide examples.

☐ Light (up to 5 kg or 11 lbs.)	
☐ Medium (between 5 to 20 kg and 11 to 44 lbs.)	
☐ Heavy (over 20 kg. or 44 lbs.)	

10. Audio Visual Effort

Describe the degree of attention or focus required to perform tasks taking into consideration:

- the audio/visual effort and the focus or concentration needed to perform the task and the duration of the task, including breaks (e.g. up to two hrs. at one time including scheduled breaks)
- impact on attention or focus due to changes to deadlines or priorities
- the need for the incumbent to switch attention between tasks (e.g. multi-tasking where each task requires focus or concentration)
- whether the level of concentration can be maintained throughout the task or is broken due to the number of disruptions

Provide up to three (3) examples of activities that require a higher than usual need for focus and concentration.

Activity #1	Frequency (D,W,M,I)*	Average Duration		
		Short < 30 min	Long up to 2 hrs.	Extended > 2 hrs
Extensive concentration is required for long periods of time when analyzing system issues, writing Specification (GDD) documents, developing complex queries and reports, resolving system issues.	D to W depending			X
Can concentration or focus be maintained throughout the duration of the activity? If not, why? ☐ ☒ No Not usually – The incumbent is subject to interruptions and priority shifts. Often client requirements and expectations are for just-in-time delivery and the incumbent must be able to start and restart analysis, GDD, query and report designs.				

Activity #2	Frequency (D,W,M,I)*	Average Duration		
		Short < 30 min	Long up to 2 hrs.	Extended > 2 hrs
Concentrated listening to Module SME's and other PeopleSoft Finance Users needs while synthesizing information to develop functional/technical ERP solutions.	D to W depending			X

Can concentration or focus be maintained throughout the duration of the activity? If not, why? ☐ Usually - The incumbent is the primary contact for the Application Owners when they are unable to troubleshoot ERP system issues and may be interrupted by direct inquiries regarding current urgent system problems. ☒No Not always - The incumbent is the primary contact for the Application Owners when they are unable to troubleshoot ERP system issues and may be interrupted by direct inquiries regarding current urgent system problems.

Activity #3	Frequency (D,W,M,I)*	Average Duration		
		Short < 30 min	Long up to 2 hrs.	Extended > 2 hrs
Meticulous attention to detail is frequently required while triaging issues and determining the correct solution, realizing and understanding potential related impacts and factoring those into the solution, developing Functional/GDD and procedural documents, anticipating downstream ERP System impacts of change, for testing, and debugging issues.	D to W depending			X
Can concentration or focus be maintained throughout the duration of the activity? If not, why? ☐ Usually ☒ No Not always – Again, constant interruptions due to high volume activity may make it difficult to complete these tasks. Greater than normal concentration required to complete a task may be interrupted to address a critical issue currently being encountered.				

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11. Working Environment

Please check the appropriate box(es) that best describes the work environment and the corresponding frequency and provide an example of the condition.

Working Conditions	Examples	Frequency (D,W,M,I)*
☒ acceptable working conditions (minimal exposure to the conditions listed below	The incumbent would be required to work hours outside of regular workdays as required (i.e., when scheduled or in emergency situations).	I
☐ accessing crawl spaces/confined spaces		
☐ dealing with abusive people		
☐ dealing with abusive people who pose a threat of physical harm		
☐ difficult weather conditions		
☐ exposure to very high or low temperatures (e.g. freezers)		
☐ handling hazardous substances		

☐ smelly, dirty or noisy environment		
☒ travel	Possibility of inter-campus travel.	I
☐ working in isolated or crowded situations		
☐ other (explain)		

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