ERP FUNCTIONAL BUSINESS ANALYST

DEFINITION OF CLASS:
The Enterprise Resource Planning (ERP) Functional Business Analyst is a journey level classification performing the full range of duties (1) providing business process support and enterprise system support in one of the ERP platforms used by the County (Oracle, Hyperion, Oracle Business Intelligence Enterprise Edition (OBIEE), and PeopleSoft) for a specified functional business domain, and (2) working cross-functionally in one or more other business domains.

MAJOR DUTIES:
An employee in this class provides functional design, extensions, configuration, testing, validation, training, operation, and maintenance of enterprise [Oracle e-Business Suite (EBS), Hyperion, Oracle Business Intelligence Enterprise Edition (OBIEE), or PeopleSoft] applications in support of a major business domain(s). Expertise and support provided include but are not limited to (a) response to business owner inquiries, user inquiries and enterprise system problems on a daily basis, (b) identification and documentation of requirements for enterprise system modifications as well as identification of opportunities to streamline the domain's business processes in coordination with business owner(s), (c) coordination with enterprise system technical specialists in the development of solutions (review and testing of technical solutions), (d) coordinate and conduct training for the application and business process for users, (e) preparation and participation in data conversion, validation and cleansing efforts, (f) validate, document and implement enterprise roles and responsibilities to ensure cross functional segregation of duties, (g) support and document the enterprise change control process including management of enterprise system set up for change requests, (h) assessment of effectiveness of enterprise system support for compliance with business guidelines (ranging from internal audit controls, segregation of duties and other checks and balances to regulatory compliance), and (i) support of data analysis to ensure data integrity. This array of duties requires expertise in business processes and knowledge of the enterprise system covering the functional business domain to identify business needs, specify solutions, recommend business process improvements and enterprise system enhancements, and work collaboratively with subject matter experts and enterprise solution developers and business owners. An employee in this class reports to an ERP Application Manager. The work performed is consistent with assigned functional responsibilities, objectives, priorities, resources, critical issues, project plan and similar factors.

This level of work requires (1) knowledge of the business processes of a major business domain, such as financials/supply chain for core accounting or revenue management (Oracle), procurement/contracting (Oracle), human resources and payroll (Oracle), transportation/warehousing management (Oracle), budgeting (Hyperion), and pension support (PeopleSoft) and (2) knowledge of the workings and functionalities of the directly supporting ERP platform (including its functional modules, interfaces and processes) to provide business process and enterprise solution expertise and support to users.

Expertise is provided in the functional design, extensions, configuration, testing, validation, training,

operation, and maintenance of enterprise applications in the specified business domain(s).

EXAMPLES OF DUTIES (Illustrative Only):
- Validates, documents, and implements enterprise roles and responsibilities and enterprise system set up change requests. Maps roles and responsibilities to system function and security access. Creates business process documentation (including new standard procedures) and gives system functionality demonstrations.
- Configures, tests, and implements new functionality and specifies or modifies Oracle/Hyperion or PeopleSoft applications to meet business requirements.
- Performs fit-gap analysis to accommodate as much new functionality as possible out-of-the-box, without the need for customization.
- Performs gap analysis to determine Oracle EBS/Hyperion/PeopleSoft/OBIEE system configuration and development changes.
- Develops functional specifications for business departments (Department of Finance, Office of Management Budget, Department of Human Resources, Department of General Services, Montgomery County Employees Retirement Plans, Department of Liquor Control, etc.).
- Conducts business requirements review; develops approaches, methods, timetables, and data collection techniques; and presents findings and recommendations to officials.
- Creates business requirements documents, system configuration documents, detailed functional design documents, test plans and test cases, user training documents and implementation documents. Serves as interface between programmers and users, ensuring that technology designs meet the needs of the users while assisting application developers with detailed user-process information. Provides user training in group sessions and one-to-one situations. Helps users adjust to new features, modules, and end-to-end business processes.
- Prepares and executes test plans to ensure that patches, modifications, and updates to the system are thoroughly tested before being placed in production. Reviews patches, modifications, and updates to the system to determine impact on current functionality and undertakes the patch analysis process. Creates and maintains documentation (e.g., setup documentation, training documentation on user procedures).
- Coordinates with the business process owners (subject matter experts) and the technical team members to design and implement system modifications. Coordinates with business owners and users, developers and Oracle Support to research, document and resolve Oracle EBS, Hyperion, OBIEE and PeopleSoft system issues.
- Uses a variety of reporting tools, e.g., Financial Statement Generator (FSG) and Oracle Business Intelligence Enterprise Edition (OBIEE) tools, such as Answer.
- Performs the full range of customer support activities, e.g., sharing knowledge from different departments to support cross-functional efficiencies. Serves as a troubleshooter in the day-to-day operation of the applicable platform (Oracle EBS, Hyperion, OBIEE or PeopleSoft). Addresses daily operational issues identified by users. Quickly identifies problems and takes the necessary corrective action.
- Stays abreast of developments in technology, especially Oracle EBS, Hyperion, OBIEE and PeopleSoft products, as well as database design and content, disaster preparedness and recovery, and other matters critical to the business operations supported.
- Performs other duties as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES:
(The knowledge, skills and abilities listed in this specification are representative of the class but are not an all-inclusive list.)
All positions
- Expert knowledge of Oracle EBS applications, and of OBIEE tools, to support of core business processes of the County (all as pertinent to the position of assignment), including upgrades, patches, and enhancements to serve as e-business support for the County in designated EBS functional area(s). This includes knowledge of, and skill in using, OBIEE business models and data elements, and in creating reports.
- Skill in problem solving to select, organize and logically process relevant information (verbal, numerical or abstract) to solve a problem. This includes the ability to recognize subtle aspects of problems and identify relevant information. Examples include skill in identifying, as pertinent to the position of assignment, business process and enterprise, system problems and responding to the wants and needs of users and the business process owners consistent with business and enterprise system standards by defining system requirements in terms of functional specifications; in reviewing and testing software upgrades prior to implementation for potential impact on existing processes and end-to-end integration testing; in reviewing consultant proposals to ensure quality; in developing workflow diagrams in support of system analysis activities and functions; and in otherwise assisting users/business process owners in defining organizational, functional, data and reporting requirements in terms of enterprise applications and then using these solutions effectively on a daily basis.
- Skill in oral communication to understand verbal information (including facts, assertions, and arguments) and to express verbal information so that others will understand and, at times, convince or persuade others. This includes skill in encouraging effective oral communication by others. Examples include communicating with other enterprise functional analysts, enterprise technical specialists who develop enterprise applications, enterprise database administrators, users, and business owners to ensure enterprise solutions that meet user requirements and enterprise standards are cost-effective, compatible, etc.; providing training to individuals and groups; and making formal presentations to technical or non-technical personnel concerning upgrades, enhancements, and patches.
- Skill in written communication to understand written information, draw inferences, form hypotheses, and develop logical arguments, and to express such information in writing so that others will understand, and to convince or persuade others. This includes skills in reviewing written work of others to resolve discrepancies in specification of IT solutions and design or construction of standard or special reports, in the exchange, or documentation, of business process information, and in the preparation of memoranda, technical documents, etc.
- Interpersonal skills to interact with others in a businesslike, customer service-oriented manner.
- Skill in using a computer for communication, planning, scheduling, word processing, presentations, and other modem office suite applications in addition to the core IT work of the job.
- Skill in working as a team member to provide excellent customer service. Skill in serving as a liaison between business owners, users, application developers and system managers, and ability to train others, such as enterprise system users.
- Ability to quickly learn and adapt to new technologies and products.

Financials/Supply Chain
- Considerable knowledge of and skill in implementing and supporting post implementation of Oracle EBS Financial and Supply Chain modules, including but not limited to General Ledger, Accounts

Payable, Purchasing, Cash Management, , Accounts Receivable, Asset Management, Projects and Grants, Property Management, Inventory, iSupplier, Order Management, Warehouse Management and iStore as well as OBIEE to serve and lead as Senior ERP Functional Business Analyst in Financials and Supply Chain.

- Considerable knowledge of core accounting principles, processes and practices to assist users, identify and specify business process improvements and enterprise solutions and to perform related functions.
- Considerable knowledge of, or ability to rapidly acquire knowledge of County-specific business wants, needs and processes in financial warehouse and procurement management including the chart of accounts, and of County, Stat, and Federal law, rules, and regulations governing accounting functions of the County (including controls and auditing).
- Considerable knowledge of Oracle EBS Financials and Supply Chain standard processes and design to assist users, identify and specify business process improvements and enterprise solutions and to perform related functions.

Human Capital Management

- Considerable knowledge of and skill in implementing and supporting post implementation of Oracle EBS Human Capital Management modules including Human Resources, Position Management and Work Structures, Advanced Benefits, iRecruitment, Employee Self-Service, Manager Self-Service, Learning Management, Workforce Performance Management as well as OBIEE to serve and lead as Senior ERP Functional Business Analyst in Human Capital.
- Considerable knowledge of core human resources management and payroll processes and practices to assist users, identify and specify business process improvements and enterprise solutions and to perform related functions.
- Considerable knowledge of, or ability to rapidly acquire knowledge of County-specific business wants, needs and processes in human capital management; and of County, state and Federal laws, rules and regulations governing personnel and pay administration functions of the County (including controls and auditing) and experience working in a multi-union environment.

Payroll and Compensation

- Considerable knowledge of and skill in implementing and supporting post implementation of Oracle EBS Human Capital Management modules including Payroll, Labor Distribution, Time and Attendance, Pension, Advanced Benefits, and Compensation Workbench as well as OBIEE to serve and lead as Senior ERP Functional Business Analyst in Payroll and Compensation.
- Considerable knowledge of core human resources management and payroll processes, benefits, labor distribution, time and attendance and practices to assist users, identify and specify business process improvements and enterprise solutions and to perform related functions. Understanding of Kronos time and attendance as it bi-laterally interfaces with Oracle HR and Payroll.
- Considerable knowledge of, or ability to rapidly acquire knowledge of County-specific business wants, needs and processes in human capital management; and of County, State and Federal laws, rules and regulations governing personnel and pay administration functions of the County (including controls and auditing) and experience working in a multi-union environment.

Hyperion (Budgeting)

- Considerable knowledge of, and skill in implementing and supporting post implementation of Oracle Hyperion modules (this includes Hyperion position numbering) as well as OBIEE to serve and lead as Senior ERP Functional Business Analyst in Budgeting.
- Considerable knowledge of core budgeting principles, processes and practices to assist users, identify and specify business process improvements and enterprise solutions and to perform related functions.
- Considerable knowledge of, or ability to rapidly acquire knowledge of County-specific business wants, needs and processes in budgeting (including the chart of accounts); and of County, State and Federal laws, rules, and regulations governing budgeting functions of the County (including controls and auditing).
- Understanding of Oracle EBS General Ledger, Project and Grants, and other financial modules as they interface with budgeting.
- Understanding of Oracle EBS Advanced Benefits, Payroll and Labor Distribution modules and other human capital management modules as they interface with budgeting.

PeopleSoft (Pension)

- Considerable knowledge of, and skill in implementing and supporting post implementation of Oracle PeopleSoft Pension administration to serve and lead as Senior ERP functional Business Analyst in Pension Administration. This includes knowledge of and skills in using pension administration tables using PeopleSoft HR application tables and configuration and workflow as well as Oracle Business Intelligence Enterprise Edition (OBIEE).
- Considerable knowledge of core pension administration principles, processes and practices to assist users, identify and specify business process improvements and enterprise solutions and to perform related functions.
- Understanding of Oracle EBS Advanced Benefits and Payroll modules and other human capital management modules as they interface with PeopleSoft (Pension).
- Considerable knowledge of, or ability to rapidly acquire knowledge of County-specific business wants, needs and processes in pension administration; and of County, State and Federal laws, rules, and regulations governing budgeting functions of the County (including controls and auditing).

SUPERVISORY CONTROLS:

Under administrative direction, the incumbent is responsible for planning and performing the work independently (little or no technical guidance is readily available from the supervisor), proactively keeping the supervisor and others informed of critical issues, and obtaining approval in accordance with established authorities.

GUIDELINES:

Guidelines for performing the work include end-to-end enterprise application design, configuration, conversion, operating system integrity assurance, generally accepted IT information security, system security, federal, state government laws and regulations, collective bargaining agreements, confidential or sensitive data, business processes with lifecycles, governmental accounting, (both full and modified accrual accounting), revenue management, budgeting, procure to pay, asset management, human

resources management, compensation, payroll, group insurance and health benefits, pension, etc., and an array of administrative policies and procedures federal laws, personnel regulations, and/or union agreements that support system configuration and customizations.

COMPLEXITY:
Complexity is characterized by broad and deep analysis of nonstandard or unusually difficult standalone variables as well interdependent variables (within business processes and within enterprise architecture) that often include critical IT variables that interact between business and IT processes. Incumbents use considerable judgment to interpret guides in reengineering of business processes, and develop enterprise solutions specifications and recommendations to accomplish work more efficiently.

SCOPE AND EFFECT:
Work products include reengineered business processes and enhanced enterprise architecture as well as critical daily advice and assistance to users in getting their work done, and affect both small- and large-scale enterprise system life cycles. Recommendations covering alteration of ERP processes or business processes are usually evaluated for such considerations as impact on specific County operations as well as trade-offs in funds/other resources, broad program goals or priorities.

CONTACTS:
Regularly recurring business contacts include persons in the same or other departments and agencies of the County or the private sector, such as users, super-users and managers at various levels, technical specialists, other functional business analysts, database administrators, manufacturer software engineers, and other subject matter or IT personnel. Occasional contact with regulators of State and Federal agencies and not-for-profit organizations, typically linked to their oversight, or use of the business domains supported. Generally, business contacts are cooperative in nature, with all parties working toward mutual goals although some skepticism or resistance, is may be present.

PUBLIC SERVICE /ASSISTANCE:
Little or no one-to-one assistance is provided directly to the public.

WORK ENVIRONMENT:
Work is performed primarily in an office environment making decisions that could lead to major organizational consequences.

HAZARDS:
Work is primarily sedentary, performed in an office setting and presents no significant hazards.

PHYSICAL DEMANDS:
The employee uses computer equipment on an ongoing basis; however, use of this equipment is not production-oriented.

MINIMUM QUALIFICATIONS:
Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:
Experience:
Four (4) years of professional experience performing work involving an enterprise system in one of

the following business domains: Finance, Human Resources, Budgeting, and Pension. Based on the assignment, the candidate must have experience in at least two modules of Oracle EBS, Hyperion, PeopleSoft, and/or Oracle Business Intelligence Enterprise Edition:

(a) For Financial/Supply Chain assignments: all Oracle Financial Management and Supply Chain modules; or

(b) For Human Resources, Payroll, and Compensation Systems assignments: all Oracle Human Capital Management modules or

(c) For Public Sector Planning and Budgeting Systems assignments: all Hyperion Planning modules plus two years of experience in Oracle EBS; or

(d) For Pension Administration assignments: all PeopleSoft Enterprise Pension Administration modules, plus two years of experience in Oracle EBS.

Education:
Graduation from an accredited college or university with a Bachelor's degree in Finance, Accounting, Human Resource Management, Computer Science, Computer Engineering, Information Systems/Technology, or another field from an accredited college or university. Certifications in specific applications may be required, depending on the duties of the position.

Equivalency:
An equivalent combination of education and experience may be substituted. For applicants possessing very hard-to-find skills which are a critical need to the department/agency, training and certification may be accepted in lieu of full degree requirements.

LICENSE REQUIREMENT: None.

PROBATIONARY PERIOD:
The probationary period must be twelve (12) months for a full-time or part-time employee appointed to a merit system position, and six (6) months for a promoted employee, during which time performance will be carefully evaluated. Continuation in this class will be contingent upon successful completion of the probationary period.

MEDICAL EXAM PROTOCOL: Medical History Review form with a Urine Drug Screen.

SUPERVISION EXERCISED: Positions in this class are non-supervisory.

CLASS SPECIFICATION HISTORY:

Class Established: December 2013
October 2014
January 2016
Revised; Education, KSAs adding Supply Chain, MQs and Format: November 2017