SENIOR ERP FUNCTIONAL BUSINESS ANALYST

DEFINITION OF CLASS:
Performs full performance level professional work analyzing, refining and documenting customer business requirements, with respect to development, implementation and production support of integrated ERP (Enterprise Resource Planning) systems. Works to design solutions to business needs by utilizing the delivered functionality first before considering custom changes. Creates functional and technical design specifications for ERP systems. Collaborate with developers and other related personnel to design technical solutions. Serves as technical expert on all customer business requirements and information needs.

MAJOR DUTIES:
An employee in this class leads the functional design, extensions, configuration, testing, validation, training, operation, and maintenance of enterprise (Oracle EBS), Hyperion, PeopleSoft, or Oracle Business Intelligence Enterprise Edition (OBIEE) applications in support of a major business domain(s). The employee is responsible for and has significant influence over a portion of projects in the team’s work portfolio. Core activities include gathering and defining requirements, configuration of standard applications, gap analysis, functional design of application extensions, maintaining end user training and support for multiple modules in several government agencies and continuing to reengineer business processes. Expertise and support provided include but are not limited to (a) responding to business owner inquiries, user inquiries and enterprise system problems on a daily basis, (b) identifying and documenting requirements for enterprise system modifications as well as identifying and exploiting opportunities to streamline the domain’s business processes in coordination and with business owner(s), (c) coordinating with enterprise system technical specialists in the development of solutions, (d) coordinating and conducting user training on the application and business process (e) preparing and participating in data conversion, validation and cleansing efforts, (f) validating, documenting and implementing enterprise roles and responsibilities to ensure the cross-functional segregation of duties is present (g) supporting and documenting the enterprise Change Control Process including management of enterprise system set up for change requests, (h) assessing the 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), (i) supporting data analysis to ensure data integrity and (j) developing strategy to support ERP objectives vis-à-vis functional support of business domains. This array of duties and responsibilities requires strong expertise in business processes and mastery of the enterprise systems covering the functional domain to identify business needs, specify solutions, recommend domain specific support strategies, business process improvements and enterprise system enhancements, and work collaboratively with subject matter experts and enterprise solution developers and business owners.

The work involves developing creative solutions and resolving critical system problems; broad and thorough analysis of nonstandard or unusually complex standalone and interdependent variables that include end-to-end enterprise focus and interaction between multiple business processes. Work products
include reengineered business processes, enterprise module-specific enhancements, as well as daily advice and assistance to users to accomplish their work and affect both small and large-scale enterprise system life cycle enhancements.

EXAMPLES OF DUTIES (Illustrative Only):

• Utilizes a combination of subject matter and system functional knowledge, identifies a wide range of issues and problems, and identifies and develops appropriate solutions. May have full responsibility for aspects of large-scale system life cycles.

• Assists in the development of a strategy in support of ERP objectives – this includes change management support and development of strategy papers, issue papers and decision papers.

• Validates, documents, and implements enterprise roles and responsibilities and set ups based on the enterprise Change Control process. Maps roles and responsibilities to system functionality and security access.

• Creates business process documentation (including new standard procedures) and demonstrates system functionality to senior management and business owners.

• Configures, tests, and implements new functionality and specifics, or modifies Oracle EBS/Hyperion/PeopleSoft or OBIEE 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; fully considers business and enterprise systems impacts from a holistic perspective and obtains stakeholder buy-in (users, super-users, and business process owners as well as IT personnel) to enhance understanding and acceptance of integrated solutions before and after implementation to facilitate optimization of performance by users. Performs gap analysis to determine EBS/Hyperion/PeopleSoft/OBIEE system configuration and development changes.

• Develops functional specifications needed by the business owner department (Department of Finance, Office of Management Budget, Department of Human Resources, Department of General Services, Montgomery County Employee Retirement Plans, Department of Liquor Control, etc.).

• Leads business requirements review; develops approaches, methods to be used, timetables and data collection techniques; and presents findings and recommendations to appropriate officials.

• Creates business requirements documents, system configuration documents, detailed functional design documents, test plans, test cases, user training documents and implementation documents.

• Serves as an interface between programmers and users, ensuring that technology designs meet the needs of the users while assisting application developers and 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.

• Proposes Service Level Agreements (SLAs) for mutually-agreed levels of support to users, in coordination with all stakeholders, after obtaining the supervisor’s approval.

• 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 in SharePoint.

• Coordinates with the business process owners (subject matter experts) and the IT development team to design and implement system modifications. Coordinates with business owners and users, developers and Oracle Support to research, document and resolve 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 Answers.
• 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) and coordinates management of issues maintained in SharePoint. Addresses daily operational issues identified by users. Identifies problems and takes the 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 or deemed necessary.

SUPERVISORY CONTROLS:
Under administrative direction, the employee is responsible for planning and performing the work independently (little or no technical guidance is readily available from the supervisor), proactively keeping the business owner, ERP Application Manager and Division Chief and others informed of critical issues and obtaining appropriate approval in accordance with one’s authority. Work is reviewed in terms of efficiency and effectiveness of operations, quality and timeliness of reports and compatibility with departmental goals and objectives.

SUPERVISION EXERCISED:
Technical guidance is provided to Functional Business Analysts, IT professionals and consultants, but this is not a supervisory class.

GUIDELINES:
Guidelines for performing the work are broadly stated. An employee in this class uses considerable judgment to interpret and develop specific procedures and policy recommendations to accomplish work assignments. Guidelines include end-to-end enterprise application design, configuration, conversion, operating system integrity assurance, adherence to 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:
The complexity of the work is characterized by varied duties involving a wide range of applications design, configuration, operational, maintenance and security issues and problems requiring the complex analysis and assessment of unusual or nonstandard matters. An employee in this class analyzes complex, non-standard or unclear information, identifies various approaches and alternatives to design and processes, develops recommendations, drafts decisions, tests solutions, and continues to further streamline business processes which affect enterprise operations.

SCOPE AND EFFECT:
The work has a substantial effect on County operations in that the Senior Functional Business Analyst has cross expertise in Financials/Supply Chain, Human Capital Management (HCM), Hyperion (budgeting) and PeopleSoft (pension), and plays a key role designing, configuring, testing, implementing, maintaining and extending the Enterprise applications in Montgomery County Government operations to other areas.

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, functional business analysts, database administrators, software engineers of the manufacturer and other subject matter or IT personnel. There is also occasional contact with regulators of State and Federal agencies and not-for-profit organizations, typically linked to oversight, or use of the functional business domains supported. Generally, business contacts are cooperative in nature, with all parties working toward mutual goals although some skepticism, or resistance, is present at times. Purposes of business contacts are primarily to advise key personnel, business owners, support users on a daily basis, plan, coordinate and justify enterprise solutions to business process or enterprise system problems, train users, leverage opportunities for business process improvement or technical solutions, plan and coordinate management of programs, resolve program operating or staff problems, and perform related functions.

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

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

MINIMUM QUALIFICATIONS:
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; and
Experience: Six (6) years of recent professional experience performing work involving an enterprise resource planning system that demonstrates the necessary knowledge and abilities in one of the following assigned Oracle business domains:
- Finance/Supply Chain: All Financial and Supply Chain modules
- Human Resources, Payroll and Compensation: All Human Capital Management modules
- Public Sector Planning and Budget: Oracle EBS and all Hyperion Planning modules
- Pension Administration: All Peoplesoft Enterprise Pension Administration Modules, Oracle EBS
- Oracle Business Intelligence: OBIEE Version 11g or higher supporting Human Resources and Financial related business processes.

Recent experience is defined as experience gained, in part, in the last five years or longer, if technically relevant.

Substitution(s):
• Fifteen (15) semester units of computer science coursework from an accredited program and in a discipline relevant to the assignment is equivalent to a full year of related, full-time professional experience that has provided the required knowledge and abilities of the assignment.
• Required educational experience is interchangeable with full-time related professional experience up to a limit of four years.
• Internships completed in conjunction with coursework are excluded from being credited towards work experience, if they are counted towards educational requirements.

Knowledge, Skills, and Abilities:

All Assignments
Expert Knowledge of:

• Oracle EBS applications and OBIEE tools to support core business processes of the County (as pertinent to the position of assignment), including upgrades, patches, and enhancements to serve as the e-business expert for the County in designated EBS functional area(s).
• OBIEE business models and data elements, and in creating reports.
• Working in a multi-union environment.

Financial/Supply Chain Assignment:
Expert Knowledge of:

• 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, iStore, and OBIEE to serve and lead as Senior ERP Functional Business Analyst in Financials and Supply Chain.
• Core accounting principles, processes and practices to assist users, identify and specify business process improvements and enterprise solutions and to perform related functions.
• 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 Assignment
Expert 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.

Payroll and Compensation Assignment
Expert Knowledge of:
• 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.
• 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.

Public Sector Planning and Budget Assignment

Expert Knowledge of:

• 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.
• Core budgeting principles, processes and practices to assist users, identify and specify business process improvements and enterprise solutions and to perform related functions.
• Oracle EBS General Ledger, Project and Grants, and other financial modules as they interface with budgeting.
• Oracle EBS Advanced Benefits, Payroll and Labor Distribution modules and other human capital management modules as they interface with budgeting.

Pension Administration

Expert Knowledge of:

• 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).
• Core pension administration principles, processes and practices to assist users, identify and specify business process improvements and enterprise solutions and to perform related functions.
• Oracle EBS Advanced Benefits and Payroll modules and other human capital management modules as they interface with PeopleSoft (Pension).

Oracle Business Intelligence Assignment

Expert Knowledge of:

• Principles and methods used to identify business requirements and to analyze and design technology solutions that meet these requirements.
• Business practices and operations in order to anticipate user technology needs.
• OBIEE application functionality, system requirements, and alternatives to configure or customize the ERP application to meet business needs.
• Mapping business processes and comparing those processes to ERP best practices.
• Extract Transform Load (ETL) and Online Analytical Processing (OLAP).

All Assignments
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 developing a strategy in support of the ERP objectives in assigned functional business domains; in identifying business process and enterprise system problems and responding to the 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, patches, enhancements 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; in coaching and leading others in provision of business analyst support services; and in otherwise assisting users/business process owners in defining organizational, functional, data and reporting requirements in terms of an enterprise application and then using these solutions effectively on a daily basis.

- Oral communication to understand verbal information (including facts, assertions, and arguments) and to express verbal information so that others will understand and, at times be convinced or persuaded. 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 meets user requirements and the 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.

- 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 skill 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.

- To interact with others in a businesslike, customer service-oriented manner. Skilled in working as a team member to provide excellent customer service.

- Serving as a liaison between business owners, users, application developers and system managers, and skilled in leading and coaching others, such as functional business analysts and enterprise system users.

- Facilitating requirement meetings and in accurately compiling and managing requirements, issues and associated team action items.

All Assignments

Ability to:

- Quickly learn and adapt to new technologies and products.

- Rapidly acquire knowledge of County-specific business wants, needs and processes in assigned business domain; and of County, state and Federal laws, rules and regulations governing personnel and pay administration functions of the County (including controls and auditing).

- Translate ERP business requirements into functional (development) requirements.
Licenses, Registrations, Certifications, or Special Requirements: Certifications in specific applications may be required, depending on the duties of the assignment.

Work Environment: Work is performed in an environment making decisions that could lead to major organizational consequences if appropriate decisions are not timely.

Physical Demands: The employee uses computer equipment on an ongoing basis. Use of this equipment is usually not production-oriented except when necessary with the approval of the business owner.

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 probation period.

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

CLASS SPECIFICATION HISTORY:

Class Created: December 2013
October 2014
January 2016

Revised: Education, KSAs to add Supply Chain, MQs and Format: July 2018