



Financial Systems Analyst I/II

Class Code:
413,414

DEFINITION

Under direction from the Manager of Finance, provides application support for the District's automated financial management system and related applications; plans, schedules, coordinates and oversees major software upgrades, new releases, and installation of related software applications; performs financial systems project management work; conducts training, both formal and informal, for departmental staff and/or systems users; may provide functional direction to the work of others; and performs other related work as required.

DISTINGUISHING CHARACTERISTICS

Financial Systems Analyst I is the first level in the Financial Systems Analyst series. Under close to general direction within a framework of established policies and procedures, incumbents perform a variety of moderately difficult application support tasks requiring knowledge of systems analysis and computer programming; and may provide functional direction to sub-professional staff. As experience and proficiency are gained, assignments become more varied and complex and the level of independent action increases within established guidelines. Assignments are given in specific to general terms and are subject to review while in progress and upon completion, except where tasks are well defined by established standards, policies and procedures. There is limited latitude for independent judgment.

This classification is distinguished from the advanced-level Financial Systems Analyst II which performs a full range of highly skilled systems analysis, programming and systems maintenance activities with less supervision, requiring a higher degree of knowledge and competencies. The Financial Systems Analyst I and II classifications are flexibly staffed. Upon recommendation of the immediate supervisor and approval by the department manager, incumbents in this class may advance to a Financial Systems Analyst II after a minimum of two (2) years at the first level and with demonstrated proficiency in the job requirements of the advanced level classification.

Financial Systems Analyst II is the advanced level in the Financial Systems Analyst series. Under general direction within a framework of established policies and procedures, the incumbent serves as senior level staff specialist in the District's Finance Department independently performing a full range of highly skilled systems analysis, programming and systems maintenance activities of advanced difficulty and complexity requiring comprehensive knowledge of the District's financial applications and systems and a high level of proficiency in system analyses tools, programming and project management techniques. Assignments are given in broad terms and are subject to review primarily upon completion. There is considerable latitude for independent judgment and action.

This classification is distinguished from professional Accountant and Information System Analyst classifications by its specialization in supporting the financial management system and related applications.

TYPICAL DUTIES

TYPICAL EXAMPLES OF DUTIES MAY INCLUDE BUT ARE NOT LIMITED TO THE FOLLOWING:

- Plans, schedules, coordinates and oversees major software upgrades, new releases, and installation of related software applications; organizes and assigns test teams; develops implementation schedule and work tasks, and manages implementation of custom changes to the District's financial management system.
- Coordinates installation of program fixes and customized menus for the financial management software programs; troubleshoots programming and systems problems associated with applications already in use.
- Studies and reports on unused functions of the financial management software; develops and tests new or modified report formats, customized programs to manipulate data, or changes to file structure; creates or updates functional specifications for new or modified reports and applications; coordinates with lead user and developer to test and implement new or modified programs as needed.
- Reviews edit reports and operator error messages and provides applications support to end users for financial management system and related applications.
- Develops documentation and training for end users on how to effectively use financial management system features and related applications.
- Studies manual accounting processes and procedures and makes recommendations on whether to and/or how to automate.
- Applies accounting and auditing principles and techniques to ensure that data integrity, internal controls, and audit trails are maintained throughout all applications.
- Performs professional support to special projects involving programming, systems analysis, or financial management, as assigned.
- May act as project leader or provide work direction or training to less experienced department staff and/or to end users.
- Performs other related work as required.

REQUIREMENTS

Any combination of education and experience that would likely provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the knowledge, skills, and abilities would be the equivalent of:

Education and Experience:

Possession of a Baccalaureate degree from an accredited college or university with a major in information systems, computer science, accounting or a related field; and

Financial Systems Analyst I: No professional experience required.

Financial Systems Analyst II: Two (2) years of full time experience in systems analysis and computer programming work equivalent to experience as a Financial Systems Analyst I with the District.

Knowledge, Skills and Abilities:

Knowledge of: computer programming principles, techniques and procedures for batch and online applications; principles and practices of systems and procedures analysis; the functions and capabilities of various computer hardware and peripheral equipment; generally accepted accounting and auditing principles and common accounting terminology; project management principles and practices, including planning, budgeting, scheduling and control; basic principles of employee training; applicable federal, state and local regulations, laws, guidelines and District policies and procedures; safe work practices and the ability to identify workplace hazards and/or unsafe conditions and take appropriate corrective action.

Skill and Ability to: conduct moderately difficult systems analyses, studies and evaluations involving financial applications; define logic for individual programs and program systems; define test schedules and test data requirements for programs; define input/output file specifications including file organization; effectively operate a personal computer and related peripheral equipment; utilize personal computer based spreadsheet and word processing software applications; maintain detailed and accurate records; prepare clear and concise written reports; provide technical training to District staff; organize work, set priorities, meet critical deadlines and follow-up on assignments; communicate effectively, both orally and in writing; establish and maintain good working relationships with those contacted in the course of the work; and perform essential duties of the job without causing harm to self or others.

Financial Systems Analyst II: (In addition to the above)

Advanced knowledge of: Oracle Enterprise One applications: Accounts Payable, Accounts Receivable, General Ledger, Fixed Assets, Payroll, Job Cost, Budget, Inventory and Purchasing; and automated report writing tools.

Skill and Ability to: conduct the most complex systems analyses, studies and evaluations involving financial applications; utilize effective project management skills to oversee system implementation or upgrade projects; evaluate and enhance existing systems for performance and take appropriate action when system operating problems occur.

Additional Requirements:

- Must possess a valid California driver's license and have a satisfactory driving record.

Working Conditions/Physical Requirements:

The essential functions of these classifications are performed in a controlled-temperature office and require the ability to: sit for extended periods of time in front of a computer screen; use finger dexterity and hand strength to perform simple grasping and fine manipulation; use a telephone and operate computer keyboard on a daily basis; speak and hear in person and on the phone; see sufficiently to perform assignments; intermittently twist to reach equipment or supplies surrounding desk; and frequently lift or carry items weighing up to 20 pounds and occasionally up to 55 pounds.

Revised: 07/15

Approved: 
Human Resources/Risk Manager