Position Description Form (PDF)

College: Sir Sandford Fleming

Incumbent's Name:

Position Title: **Technical Business Analyst (II) - Finance** Payband: I

Position Code/Number (if applicable):

Scheduled No. of Hours: ____37.5_____ per week

Appointment Type: X 12 months □ Less than 12 months (please specify # months: ________)

Supervisor's Name and Title: John Pacey, Director Financial Transformation and Analytics

Completed by: John Pacey PDF Date: May 13, 2023

Signatures:

Incumbent: Date:
(Indicates the incumbent has read and understood the PDF)

Supervisor: 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 fo 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 representation 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 Director, Financial Transformation and Analytics, the incumbent provides business analysis and solutions in the development, maintenance and enhancement of all Peoplesoft processes for the Finance System and related business functionality (e.g. bolt-on applications; third-party software) within the Finance Division. The incumbent works with end-users and other Peoplesoft end-users, Information Technology staff, vendor representatives and relevant College leaders to gather functional information and translate that information into detailed business requirements, functional specifications, test plans, end-user training materials, and procedural documentation.

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 time annually*

1. Operational Support for Finance Systems Maintains the day-to-day operation of the Evolve systems including system modifications, patch/upgrades, maintenance of business rules and associated system table configuration. Makes specific recommendations with respect to the appropriateness of a variety of system patches/bundles or upgrades as they relate to the Finance system. Uses the functionality of the system to design and/or recommend changes or enhancements to business processes and/or system configuration to meet the requirements for unique circumstances. Coordinates installations (test and production instances) with ITS & conducts acceptance testing for software patches/fixes and major design upgrades for the Finance system. Responsible for system testing and best fit analysis as it relates to Finance and other related system (budget, payroll, Power BI Dashboards, etc). System expert for finance requirements. Support includes continual education of users about updates to and status of the finance system which they depend on for day-to-day operating. In consultation with management, exceptions to normal processes must be resolved quickly through effective trouble-shooting, good communication to affected users, adequate contingency plans, and timely follow up analysis leading to continuous improvements to the level of service provided. Establishes systems, queries and reports to provide accurate financial, accounting, purchasing and budget information. Maintains an awareness of system interdependencies so that a business practice change in one area does not cause service problems elsewhere. Ensures payroll is accurately brought over from HR to Finance and provides corrections to incorrect departments and accounts. Ensures student information is accurately brought over from Student to Finance.	40%
2. Functional Team Leader In consultation with Management, determines the feasibility of requests, recommends changes/enhancements of business processes and/or system configuration and implementation strategies to meet college, Financial Reporting, Budget Services, Accounting Operations, Purchasing and Payroll needs to maximize system functionality. Coordinates and defines work requests for these areas so that they can be appropriately prioritized, resourced, and scheduled. Tracks specific work efforts through a project plan and/or logged issues. Assigns tasks to work group and monitors progress for status reporting. Researches product capabilities and alternate system configurations. Defines new system requirements to meet a variety of program and policy directions.	20%
3. Procedural Documentation, Queries and Report Generation Responsible for documentation for the Finance System. Development of relevant reports/queries. Develops queries and reporting tools to investigate and analyze system data structure relationships, works with finance, budget, purchasing, accounting and payroll staff to identify and confirm business requirements, develops recommendations for process improvements; consults with the appropriate managers regarding recommendations, and implements approved solutions to ensure data integrity.	15%

4. Business Application Service Representative Acts as a point of contact/liaison between a variety of user groups (e.g. Academic Operations; Human Resources; Student Financials; FTS, all campus locations) and the Information Technology (IT) department with respect to information or process/functionality requests within the Finance System. This involves facilitating the development of new functionality as well as the resolution of any existing system issues within the context of a fully integrated system.	10%
5. Provision of Formal Internal Training Develops training materials and resources for end-users of the Finance System. Training is delivered in small group sessions as well as on an individual basis.	5%
6. Security Roles and Maintenance In consultation with the Director, Financial Transformation and Analytics, this role operationally ensures that all users of the Finance System have appropriate user profiles and security accesses. Responsible for security level access to the Finance and budget system and making recommendations about security roles. Configures and responsible for budget trees, account and department setup, queries, Nvision reports, Power BI Dashboards and software security. Provides guidance to staff on downloading information from a variety of sources and setting up data bases.	5%
7. Other related duties as assigned	5%

* 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% | 1 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 that is 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
□ 1 year certificate
□ 2 year diploma
□ Trade certification
X 3 year diploma / degree
□ 4 year degree or 3 year diploma / degree plus professional certification
□ Post graduate degree (e.g. Masters) or 4 years degree plus professional certification
□ Doctoral degree

Field(s) of Study:

Business Administration-Accounting diploma* or Business Administration degree**. Application Development, Computer Science

*\/** Diploma/degree <u>must</u> include courses in systems analysis, systems design and the management of relational databases.*

B. Check the box that best describes the requirement for 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 requirement that would typically be included in the job posting and would be acquired prior to the commencement of the position. Do not include courses that are needed to maintain a professional designation.

X 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 requirements obtained by course(s) of a total 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 year 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 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	
X Minimum of five (5) years	Financial • Previous experience in progressively responsible positions within a computerized financial environment including technical and analytical accounting skills • Understanding of and experience with internal audit processes • Preparing financial statements, variance analysis and costing Technology • Database reporting tools, advanced user-level knowledge of RDBMS, working with multiple systems and points of integration • Expert-level knowledge of spreadsheets, databases and project planning tools • Previous functional experience with Enterprise Resource Planning (ERP)/RDBMS products • Setting up and maintaining databases • Developing complex queries • Advanced level experience with setting up and maintaining business intelligence products Project Management • Previous project management experience • Evaluating client needs, time estimates, setting tasks, determining priorities, tracking progress toward completion • Previous experience assigning/allocating tasks to other project team members Application Development • Previous experience defining functional requirements and identifying functional conflicts between systems during the development or integration of new business processes • User acceptance testing End-User Support • Ability to communicate effectively with technical/non-technical users for the purposes of knowledge transfer, troubleshooting, and requirements gathering • Proven experience with troubleshooting principles, methodologies and issue resolution techniques • Development of procedural documentation/end-user reference materials Training / Presentations • Experience in delivering presentations • Development of business, functional and/or technical materials for presentation and training purposes General • Experience working independently in a customer-service focused team within a fast-paced business environment featuring critical deadlines, multiple projects and competing priorities
□ Minimum of eight (8) years	

3. Analysis and Problem Solving

This section relates to the application of analysis and judgement 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 judgement 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.	Implementation of new ERP functionality for the Finance System.
How is it identified?	Need is identified by the incumbent and/or user.
Is further investigation required to define the situation and/or problem? If so, describe.	Yes, the incumbent must research the requirement, determine scope, and urgency. Depending on the requirement, consultation and impact on other functional areas needs to be evaluated and considered
Explain the analysis used to determine a solution(s) for the situation and/or problem.	The incumbent would gather all requirements and develop and document needs analysis. The requirement would be researched to determine if a delivered function exists. If no delivered functionality exists the incumbent needs to research the impact on other functional areas and enter an issue that defines the source tables, applicable dates, priority, and samples. The incumbent would work with the ITS Developer to ensure that the delivered solution meets the user requirements. Unit testing and issue signoff will occur when product is complete. Verification queries may also be developed during this process to support requirement
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	Program documentation, vendor support lines, online customer forums (HEUG – Higher Education User Group), ITS, and contacts at other Ontario colleges and universities, white papers and release notes.

3. Analysis and Problem Solving

	#2 regular & recurring
Key issue or problem encountered	Integration Issues between Finance System, HR System , and Student System Example erroneous entries on Finance System.
How is it identified?	The incumbent develops monitoring queries which identify possible data integrity issues. Financial analysis reveals differences.
Is further investigation required to define the situation and/or problem? If so, describe.	Based on system knowledge the incumbent will look for and search out the possible sources of system/data errors. Working with the HR Systems Analyst or Enterprise Systems Programmer/Analyst the incumbent would review all of the base-line configuration tables to isolate the possible source of error. This is a proactive requirement to ensure that issues are not visible to the end user
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Once the error or required new functionality is identified the incumbent must determine if the core configuration/rules in the System are working. Would need to investigate the configuration of the Finance system and HR system to ensure the two configurations are aligned. The data would need to be checked after each configuration setup. Corrections are made to the system configuration/rules and data retested. Final configurations would be applied by the incumbent to the production environment and retested.
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	Program documentation, vendor support lines, online customer forums (HEUG – Higher Education User Group), ITS, and contacts at other Ontario colleges and universities, white papers and release notes.

	#3 regular & recurring
Key issue or problem encountered	The incumbent is responsible for maintaining the security access to all financial information for the college. Changes in organizational structure, reporting requirements etc may require setup of new accounts, or new departments or realigning existing departments.
How is it identified?	Through proactively monitoring by the incumbent or from ad hoc requests determines the requirements that can be different from outside of normal operational requirements.

Is further investigation required to define the situation and/or problem? If so, describe.	The incumbent must clearly understand the requirements as to what is required. They must have thorough understanding of what needs to be set up and configured from a variety of internal sources that are affected (HR, Student) not only finance. Staffing requirements for new departments must be established and communicated to HOD for set up on their side of Peoplesoft, requistioners set up, IT contacted etc.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	The budget manager tree, the changes required, and the effect of these must be understood by the incumbent. Configuration changes must be understood and tested. Various alternatives to arrive at the desired outcome must be analysed and the best alternative selected.
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	None. The incumbent must determine the level of risk and determine the best course of action.

3. Analysis and Problem Solving

	#1 occasional
Key issue or problem encountered	Vendor Software Upgrade/Bundle Installation. Incumbent reviews ERP and related Finance System patch documentation to determine scope of the upgrade. Incumbent must consider existing Fleming modifications and impacts on all integration points for the Finance System with other College systems.
How is it identified?	Need is identified by the incumbent and/or users.
Is further investigation required to define the situation and/or problem? If so, describe.	Yes, the incumbent would investigation and research the requirement, determine scope, and urgency. Depending on the requirement, consultation and impact on other functional areas needs to be evaluated and considered to establish how to obtain the required information.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	The incumbent would gather all requirements and develop and document needs analysis. The requirement would be researched to determine what delivered function exists and the impact on other functional areas. The incumbent would prepare project plan including timelines and resources. The incumbent would work with the ITS to set up new module, testing instances. Module testing and issue signoff will occur when product is complete. Verification queries may also be developed during this process to support requirement

What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	General guidelines.

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.

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

	#1 regular & recurring
List the project and the role of the incumbent in this activity.	Develops, coordinates and maintains detailed project plan for implementation of new functionality. Monitors project status and any issues resolution, as needed. Allocates work to the project team.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	The incumbent is required to assimilate technical information into a report structure that is user friendly and accessible to managers. Issue resolution must be tracked, documented and prioritized. This often requires communication and cooperation with other departments. Issues are shifted depending on timeframes and urgency so follow-up, decision making, and dynamically switching of tasks is a required for this position. When a data issue is solved with a functional fix the incumbent will identify the solution, impact, document the steps and determine appropriate timelines.
List the types of resources required to complete this task, project or activity.	Published System Documentation HEUG User Group Oracle/PeopleSoft System Support
How is/are deadline(s) determined?	Deadlines are determined by severity of the issue , availability of resources, or by project plans. .
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	For the Finance System the incumbent would identify the change impact and decide whether the severity requires referral to Director or not. EOLT determines the overall priority of the work.

4. Planning/Coordinating

	#2 regular & recurring
List the project and the role of the incumbent in this activity.	Incumbent has the lead coordination for receiving and tracking functionality issues arising from the production use of the Finance system. Project Management of issues and implementation of new modules and updates to existing modules. Responsible for project plan development and/or maintenance. This includes task identification, time estimates, needed resource requirements ie staff hours. The incumbent must determine project status and monitor progress in relation to the project plan. The incumbent is responsible for assigning tasks and monitoring the progress and outcomes of those tasks to ensure the completion of the project. This is an on-going process which depending on College system priorities will also involve additional enhancement/new functionality as part of the project management requirement.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	The incumbent must possess project management skills to clearly articulate and define project scope and expectations. All plan tasks must be organized and coordinated to ensure project completion.
List the types of resources required to complete this task, project or activity.	Knowledge of the business schedules as they relate to the Finance System. Extensive knowledge of delivered PeopleSoft functionality is required to provide reasonable estimates for time completion.
How is/are deadline(s) determined?	Incumbent will recommend the deadlines via the project plan.
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	For the Finance System the incumbent would identify the change impact and decide whether the severity requires referral to Director or not. EOLT determines the overall priority of the work.

	~~#3 regular & recurring~~
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? And who determines whether these changes have an impact on others? Please provide concrete examples.	

4. Planning/Coordinating

	#1 occasional
List the project and the role of the incumbent in this activity.	Prepares and delivers training presentations and documentation to support implementations of additional functionality to Finance System and other related end-users.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Timing of training established by the incumbent. The incumbent will work with the Directors to develop the content and actual delivery of the training events. Use of presentation and teaching techniques required to ensure end-user learning and understanding.
List the types of resources required to complete this task, project or activity.	Extensive System, business process and product knowledge. Ability to utilize various presentation tools such as Microsoft Powerpoint, and Word.
How is/are deadline(s) determined?	Incumbent recommends dates based on urgency of training required. Actual dates for training events would be coordinated with other operational areas of the college
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	The trainee departments and managers. Schedule could shift depending on the demands on the staff involved

	#2 occasional
List the project and the role of the incumbent in this activity.	Functional Lead for Finance System. The incumbent is responsible for the integrity and configuration of system processes. Changes required need to be made eg. NVision or Cognos PowerPlay
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Proactive understanding of the changes required due to changing information needs and requirements. Considering that the base line configuration tables are accessed by all Finance modules, any changes to these core rules must be clearly planned and coordinated. For example an institutional decision to change the Academic Structure resulted in extensive base line configuration changes. The timing of the visibility of these changes (effective dates) needed to be coordinated with the deployment date of the Academic Structure in the general ledger. The incumbent is responsible for defining the sequence/order in which the changes must occur. The order in which they occur impacts other department timelines.
List the types of resources required to complete this task, project or activity.	Extensive knowledge of finance, HR, and student business procedures plus PeopleSoft Finance and HR base level configurations, functionality and table structures. Utilization of budget trees, establishing powerplay catalogues, writing queries, reports, downloading and manipulating of data.
How is/are deadline(s) determined?	This position is a member of the Evolve Resource Team which works in cooperation to accomplish College priorities. When the incumbent identifies a system requirement the incumbent is responsible for establishing the timelines
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	The incumbent determines if changes must be made to the data collected using their judgement. The incumbent may have to meet with managers and other employees to determine their needs. If the incumbent cannot resolve the issue or it involves policy changes or staffing issues the change would be referred to the Director

5. Guiding/Advising Others

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

Regular & Recurring	Occasional	Level	Example
□	□	Minimal requirement to guide/advise others. The incumbent may be required to explain procedures to other employees or students.	
X	□	There is a need for the incumbent to demonstrate correct processes/ procedures to others so that they can complete specific tasks.	Functional lead for the Finance system. Daily requirements for the incumbent to explain/demonstrate how to process transactions/enter data. First point of contact for processing errors.
X	□	The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities	Assists user department by designing system procedures. Must analyze system functionality and recommend the best course of action for others. Coordinates the efforts of the functional work group, monitoring tasks and ensuring project stays on schedule. The incumbent is responsible for providing training to all Finance, Budget, Accounting and Purchasing staff. As well the incumbent will ensure all staff have accurate business process documentation so that they can accurately and efficiently complete their job duties.

□	□	The incumbent is an active participant and has ongoing involvement in the progress of others with whom he/she has the responsibility to demonstrate correct processes/procedures or provide direction.	
□	X	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.	Within the role of project management, The incumbent is responsible for assigning tasks, monitoring progress and ensuring completion within prescribed timeframes. The incumbent is responsible for ensuring the tasks assigned are completed accurately.

6. Independence of Action

Please illustrate the type of independence or autonomy exercised in the 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)
Timelines established in keeping with key system processes and initiatives and as required to meet the deadlines established in the College's fiscal cycle and MTCU deadlines. General instructions provided for new projects. The incumbent works directly with Administration and Support Staff in various user and ITS departments and has the ability to develop the required process(s) to reach the stated objective.	

What rules, procedures, past practices or guidelines are available to guide the incumbent?	
Regular and Recurring	Occasional (if none, please strike out this section)
• Generally none as a number of the functions are unique in nature. The incumbent has the ability to develop the required process to reach the stated objective. • Industry trends and standards must be interpreted and carefully applied locally (College; Finance Division) • Past practices • Other educational institutions • Higher Education User Group (HEUG) • ERP Vendor resources (e.g. Peoplebooks)	

How is work reviewed or verified (eg. Feedback from others, work processes, Supervisor)?	
Regular and Recurring	Occasional (if none, please strike out this section)
Meetings with user groups and internal project groups. Supervisor reviews work by exception. Supervisor reviews overall outcomes at time of project completion. The system (in production) is also checked on a regular basis and the essential criterion of success is whether or not system development meets the articulated user needs. Projects delivered on-time, within budget.	

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)
Functionality or business process needs that impact other integration points in the College system.	

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)
Matters requiring a change in policy/procedures or past practice. Serious functionality or internal control issues that may affect viability of the finance system and are not being resolved quickly through normal channels. Changes to project scope/budget/timelines. Staffing/resource issues related to project planning and deadlines including cross-functional and inter-departmental implications. Decisions related to assignment of user profiles/security access for the system.	

Describe the type of decisions that would be decided by the incumbent.	
Regular and Recurring	Occasional (if none, please strike out this section)
Development of data analysis tools, reporting mechanisms as required for business and functional needs. Issues escalation to IT Department or to Peoplesoft directly. Determines the most appropriate solutions to recommend to decision-makers to address an identified business/functional need. Determines components of functional test plans. Establishes metrics regarding project outcomes and where efficiencies can be found. Base line configuration changes are made by the incumbent. Since these changes have impact on the functionality of entire Finance system this is a crucial decision.	

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 the 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 fulfil 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 (D, W, M. I)*
How is it received?	How is it carried out?		
Request from a functional area regarding a system issue.	Incumbent investigates to identify true nature of the issue. Examine process, data and other system elements and impacts of the issue. Recommend solutions (e.g. data fix)	Finance Purchasing users,; ITS;RO; Student Financials; FDR; HR; other campuses	D
New business need identified.	Consultation with user department to detail functional requirements. Research and assess solutions (e.g. reconfiguration; new module; custom development). Impacts to other areas must be considered.	Finance, purchasing functional staff; ITS; AO; FDR; RO; Student Financials; FTS; Faculty; Management; other campuses	M
Request from a functional area regarding a custom reporting requirement.	Responds to presenting needs and looks beyond those to appropriately customize reporting over the entire business cycle. Designs & configures reports and queries to meet functional needs.	Finance functional staff; RO; Student Financials	W
System configuration and acceptance testing.	Engages rigorous functional and acceptance testing to ensure the integrity of business process & data. Documents as appropriate.	Finance functional staff; RO; Student Financials; ITS; Finance; AO; HR	M
Review/analysis of vendor supplied bundle/patch upgrade list re: installation decisions.	Reviews vendor supplied documentation to determine if/when the fixes get applied. Must be reviewed for impact on Fleming system modifications, queries, etc.	ITS; Finance functional staff; RO; Student Financials; HR	I

* 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	Networking at conferences or with product user-groups.	Peers at other institutions.	I
Explanation and interpretation of information or ideas	Directions and instructions regarding technical aspects, project priorities, deadlines, and acceptable standards.	Finance end-users; ITS; Management.	D
	Project status reporting; consultations.	End-users; project teams; ITS; Mgmt	W
	General technical, functional or product related clarifications.	Vendor support; HEUG;	M

Imparting technical information and advice	Discussions regarding problems with the system, possible enhancements, complex explanations, instruction, and general troubleshooting. Discussions with end-users on possible changes to the system, procedural use of the system, and/or system trouble-shooting. Implementation of new systems may involve changes to business process which must be explained to various stakeholders. Imparting functional or procedural clarifications or facilitating informal learning opportunities. Guidance in access and interpretation of financial reports and queries	Finance end-users; ITS; other Analysts; end-users End-users Dept managers; departmental end-users End-users Finance end-users; ITS; other Analysts; end-users	D M D D W
Instructing or training	Development and delivery of formal systems training sessions in a classroom or workshop setting. E.g. Broader Public Sector process	End-users of all technical levels.	I
Obtaining cooperation or consent	Identifies any unusual situations and seeks resolution requiring influence of others to obtain changes to the processes or configuration Changes to deadlines	Finance/Purchasing/ Accounting/ Budgeting/ Budget managers/ Registrars office/APO MTCU	Infrequently as required Infrequently as required
Negotiating			

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

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, 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 desk / computer	D			X	X		
Personal computing	D			X	X		

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

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 or 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 a task and the duration of the task, including breaks (eg. up to 2 hours 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 (eg. 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.

<table>
<tr><th rowspan="2">Activity #1</th><th rowspan="2">Frequency
(D, W, M, I)*</th><th colspan="3">Average Duration</th></tr>
<tr><th>Short < 30 mins</th><th>Long up to 2 hrs</th><th>Extended > 2 hrs</th></tr>
<tr><td>Focused listening to business needs while synthesizing information to develop business solutions.</td><td>W</td><td></td><td></td><td>X</td></tr>
<tr><td colspan="5">Can concentration or focus be maintained throughout the duration of the activity? If not, why?
□ Usually
X No – Incumbent is the primary contact for troubleshooting system failures. When engaged in systems development discussions during peak times, the conversation is often interrupted by direct inquiries for current, urgent system problems.</td></tr>
</table>

<table>
<tr><th rowspan="2">Activity #2</th><th rowspan="2">Frequency
(D, W, M, I)*</th><th colspan="3">Average Duration</th></tr>
<tr><th>Short < 30 mins</th><th>Long up to 2 hrs</th><th>Extended > 2 hrs</th></tr>
<tr><td>During functional design, the incumbent needs to consider and test implications of different designs. Critical decisions are made during the design phase that impact users at later stages of the component development.</td><td>M</td><td></td><td></td><td>X</td></tr>
<tr><td colspan="5">Can concentration or focus be maintained throughout the duration of the activity? If not, why?
□ Usually
X No – Incumbent is the primary contact for troubleshooting system failures. When engaged in systems development discussions during peak times, the conversation is often interrupted by direct inquiries for current, urgent system problems.</td></tr>
</table>

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

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)*
X acceptable working conditions (minimal exposure to the conditions listed below)		D
☐ 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 extreme weather conditions		
☐ exposure to very high or low temperatures (e.g. freezers)		
☐ handling hazardous substances		
☐ smelly, dirty or noisy environment		
☐ travel		
☐ working in isolated or crowded situations		
☐ other (explain)		

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