Job Description

**Job Title:** Financial Systems Specialist  
**Department:** Finance  
**Reports To:** Associate Director, Financial Systems  
**Jobs Reporting:** None  
**Salary Grade:** USG 9  
**Effective Date:** November 2018

**Primary Purpose**

The Financial Systems Specialist is a position within Finance reporting to the Associate Director, Financial Systems. The incumbent maintains and enhances financial systems by analyzing business requirements, collaborating on design, testing, and implementing solutions to align the best use of technology to support financial accounting and business processes. The Financial Systems Specialist works closely with the Business/Systems Analyst(s) to support planned maintenance, updates and configuration required to ensure regulatory, compliance and client needs are met. The incumbent is forward looking and regularly assesses current and future technology needs of Finance relative to transformational efforts.

**Key Accountabilities**

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<th>Support and maintain the University’s financial and finance-related systems</th>
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<td>- Maintain system configuration (e.g. system attributes, relations, and values thereof) in accordance with established practices to support the overall operations of the University.</td>
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<td>- Maintain operational system processes to support University business and to provide timely financial information (e.g. import transactions, update financial accounts, post transactions, month end activities, etc.).</td>
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<td>- Maintain workflows so that the appropriate users approve transactions and that processes are completed in a timely manner.</td>
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<td>- Support testing and implementation of system-based business processes and software maintenance packages (e.g. upgrades, critical security patches, etc.).</td>
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<td>- Participate in cross-functional trouble-shooting, analysis and testing with project teams. Participants may comprise of external business partners (e.g. software providers, banking partners, etc.) or University departments (e.g. Information Systems and Technology [IST], Registrar’s Office, Graduate Studies and Postdoctoral Affairs, Food Services, Print + Retail Solutions, etc.).</td>
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<td>- Execute complex analysis, identify root cause of problems, contribute to development of solutions and recommend improvements to maximize system potential.</td>
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<td>- Review and analyze release notes from software providers to keep informed about enhancements and recommend opportunities for improvement to the University’s financial systems.</td>
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<th>Support system access security and controls</th>
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<td>- Provide appropriate and secure access to authorized users, including commissioning, de-commissioning and regular reviews in a timely way, ensuring a positive client experience and exceeding client expectations.</td>
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<td>- Recommend access security and controls that promotes strong internal controls, such as separation of duties, appropriate authorization, and audit trails.</td>
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<td>- Provide ongoing support to financial systems by managing notifications, resolving issues, and addressing more complex, system related issues.</td>
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Job Description

- Assist with system access issues such as logging on, password and browser issues.

**Support functional system testing processes**
- Identify test scenarios, develop and continually improve test scripts, and execute testing to validate the development and configuration of financial systems relative to design specifications and business requirements to ensure that system projects/initiatives meet the needs of all stakeholders, including recommending best business practices and adopting strong internal controls.
- Support the testing of new/modified applications to ensure applications and results meet the University’s needs.
- Support stakeholders in user acceptance testing and the development of test scripts, including unit and integration testing.
- Document and maintain system procedures.
- Research, evaluate, document and recommend system and business practice improvements.
- Participate in the assessment of upgrades, updates, and impact of new modules to current integrations and interfaces, including gap and best-fit analysis.

**Support financial and management reporting processes of the University**
- Analyze reporting requirements and document report specifications with stakeholders.
- Develop, test, and implement reports to support operational processes, including trend analysis and analysis of data that advances business process improvements.
- Build an understanding of system functionality and capabilities to proactively identify opportunities to improve reporting.
- Participate in other department projects/assignments as required.

**Required Qualifications**

*All employees of the University are expected to follow University and departmental health and safety policy, procedures and work practices at all times. Employees are also responsible for the completion of all health and safety training, as assigned. Employees with staff supervision and/or management responsibilities will ensure that assigned staff abide by the above, and actively identify, assess and correct health and safety hazards, as required.*

**Education**
- Undergraduate degree in one or more of the following disciplines: Information Systems & Technology, Accounting, or Mathematics
- A recognized Canadian professional accounting designation (CPA (CA, CMA, or CGA)) is a definite asset
- Accreditation as a Business Analyst at Level 2 CCBA (Certification of Capability in Business Analysis) or higher is preferred

**Experience**
- Minimum 2 years’ progressive experience with financial system applications and functional technology projects
- Proven knowledge of business analysis and an understanding of project management methodologies
- Experience in interpreting requirements, performing fit/gap analysis and preparation of system-related process documents

**Knowledge/Skills/Abilities**
- Strong analytical and problem solving skills that rely on a structured approach with the ability to learn new concepts/processes
- Exceptional attention to detail
Job Description

- Effective planning and organizational skills with the ability to adapt to change and perform effectively under pressure
- A continuous improvement mind set and an exceptional customer service focus
- Ability to elicit requirements from stakeholders
- Excellent interpersonal and written/oral communication skills
- Works independently with a strong work ethic and demonstrated ability to work in cross functional teams
- Exceptional computer skills including advanced MS Excel (i.e. functions and formulas such as macros, pivot tables, etc.) and proficiency with MS Word and MS PowerPoint

Nature and Scope

- **Contacts:** Internal: Finance team members as well as IST colleagues and stakeholders across the campus community to resolve issues related to area of responsibility, facilitate workshops, and negotiate with stakeholders in designing solutions. External: Individuals representing software vendors.

- **Level of Responsibility:** Under the direction of the Associate Director, Financial Systems, this position is responsible for supporting the functional aspects of financial systems. Represents Finance in complex cross-functional projects related to systems development and maintenance.

- **Decision-Making Authority:** Recommends system maintenance and enhancements to the Associate Director, Financial Systems to ensure financial systems are delivering maximum effectiveness aligned with stakeholder and overall department needs. Recommends emerging technologies, which improve financial and business processes and reporting. Accountable for actively participating in assigned projects and for ensuring financial and business requirements are met. Accountable for maintaining financial systems to a high degree of reliability and integrity.

- **Physical and Sensory Demands:** Minimal physical demands typical of a position operating within an office environment. Requires high attention to detail and must handle distractions, changing priorities and interruptions, while meeting required deadlines.

- **Working Environment:** Office based. There will be situations that will require the employee to work outside of and in addition to the core business hours, including but not limited to resolving critical problems for processes that may have failed and/or providing support for upgrades. It is expected that these will be unusual situations and every attempt will be made to limit these situations.