

# University of Houston – Clear Lake

## Position Description

Job Title: **Functional Analyst III - Budget**

Job Code: **3145**

Pay Grade: **050**

FSLA: **EX**

Location: **UHCL**

Retirement Program: **TRS**

### QUALIFICATIONS

	REQUIRED	PREFERRED
Education	Bachelor's degree or equivalent experience.	Bachelor's degree
Experience	Minimum five years directly job related experience.	
License/Certification		

*This position may be security sensitive requiring a background check of the final candidate.*

### POSITION SUMMARY

Performs senior level professional work by assisting the Exec Director-Budget and Vice President for Administration and Finance with financial analysis and preparation of reports and presentation materials. Compiles financial data with the use of queries and Access. Responsible for PeopleSoft Finance problem solving and troubleshooting efforts. Responsible for leading the design, development and implementation of the Budget Development System to include analysis, testing, documentation and training. Responsible for PeopleSoft Finance upgrades including testing, training, and documentation. Serves as liaison between UHCL and UHS. Responsible for Finance Security, creating CSRs in the STAT system, monitoring progress with changes, and testing changes. Assists in preparation of the Annual Operating Budget. Participates in the design of the Unit Assessment Plan, monitoring, collecting and analyzing data in support of actual results. Develops training materials and provides training to financial users.

### Duties and responsibilities

### % Time

Responsible for PeopleSoft Financial (including General Ledger, Accounts Payable, Purchasing, Budget, Research) problem solving and troubleshooting efforts for UHCL. Analyzes problems as they are submitted and develops solutions, where applicable. Serves as liaison between UHCL and the project team with regard to the financial system. Responsible for the implementation efforts of PeopleSoft Finance upgrades to include analysis, testing, training and documentation for UHCL. A key participant in decision making process regarding system setup, processes, and procedures critical to the operations of the university.	35
Reviews day-to-day processes related to Peoplesoft Financial, recommending changes and providing documentation as necessary. Compiles financial data, performing financial analysis to produce spreadsheets. Develops adhoc queries for analysis of PeopleSoft data. Develops training materials and documentation for on-line training sessions as related to the PeopleSoft Financial System to include General Ledger, Accounts Payable, Purchasing, and Budget Development. Trains the financial system users. Develops training materials and provides training for implementations and upgrades. Responsible for content on the PeopleSoft Financial Support website. Responsible for PeopleSoft Finance Security and Tree Maintenance.	35
Leads the design, development and implementation of the Budget Development System to include analysis, testing, and training. Assists in the preparation of the Annual Operating Budget by performing various analyses to ensure the accuracy of the data. This includes gathering data, preparing worksheets, designing reports and monitoring and updating Budget Development System	20

tables and trees. Prepares Budget Journals and Journal Entries as needed.	
Monitors, collects and analyzes data for the Unit Assessment Plan throughout the year. Assists in writing the Unit Assessment Plan Report annually. Meets quarterly with Business Coordinators to review cost centers to include budget balances, open commitments, revenue, and fund equity.	10

*This position description describes the general qualifications, duties and responsibilities of work being performed.*