| Post Details | | Last Updated: | 02/06/2025 |
|---|---|---|---|
| **Faculty/Administrative/Service Department** | Finance | | |
| **Job Title** | Finance Systems Analyst | | |
| **Job Family** | Professional Services | **Job Level** | 5 |
| **Responsible to** | Finance Systems Manager | | |
| **Responsible for (Staff)** | N/A | | |

## Job Purpose Statement

The Finance Systems Analyst will play a crucial role in the successful migration of the University's Unit4 ERP system from the current on-premise system to the Unit4 SaaS cloud solution. Reporting to the Finance Systems Manager, the postholder will be pivotal in ensuring a smooth transition to the cloud and delivering new web functionality that supports the University's financial operations. The postholder will be responsible for system specific projects and be a key part of a wider team who are responsible for ensuring effective planning, configuration, and deployment of the new cloud functionality, while engaging with key stakeholders across finance, IT and other key functions.

## Key Responsibilities This document is not designed to be a list of all tasks undertaken but an outline record of the main responsibilities

1. To analyse and interpret user requirements and implement new system functionality.
2. Provide technical expertise in system administration, including data migration, security setup, reporting structures, and system controls.
3. To deliver staff training to key users in relation to financial systems.
4. To develop system documentation for Finance staff and other end users.
5. To maintain an in depth understanding of the finance systems in addition to specialist knowledge of specific modules as agreed with the Finance Systems Manager.
6. To propose solutions as appropriate to meet new and changing business needs and to assist in the specification of further systems developments.
7. To ensure that system problems are rapidly investigated and satisfactorily resolved.
8. To undertake other tasks associated with the development and maintenance of financial systems as identified by the Finance Systems Manager.

**N.B. The above list is not exhaustive.**

**All staff are expected to:**

- Positively support equality of opportunity and equity of treatment to colleagues and students in accordance with the University of Surrey Equal Opportunities Policy.
- Work to achieve the aims of our Environmental Policy and promote awareness to colleagues and students.
- Follow University/departmental policies and working practices in ensuring that no breaches of information security result from their actions.
- Ensure they are aware of and abide by all relevant University Regulations and Policies relevant to the role.
- Undertake such other duties within the scope of the post as may be requested by your Manager.
- Work supportively with colleagues, operating in a collegiate manner at all times.

**Help maintain a safe working environment by:**

- Attending training in Health and Safety requirements as necessary, both on appointment and as changes in duties and techniques demand.
- Following local codes of safe working practices and the University of Surrey Health and Safety Policy.

## Problem Solving, Accountability and Dimensions of the Role

This section outlines some of the key elements of the role, which allow this role to be evaluated within the University's structure. It provides an overview of what is expected from the post holder in the day-to-day operation of the role.

The post holder is responsible for:

- The migration of the University's current Unit4 ERP system to the Unit4 SaaS cloud-based solution. The postholder will play a central role in adapting current financial operations so that they work effectively in the new web environment. The postholder will be involved in requirements gathering, solution design, configuration, testing, and go-live support. Post-implementation support will also be required to ensure smooth operational roll out.
- Assessing the functionality and features offered by the new cloud-based system and making recommendations for configuration improvements. This requires an expert user of the system and they will be expected to utilise this knowledge and technical expertise to enable the University to use the applications to their full potential.
- Assisting in resolving any systems integration challenges, working closely with the IT team to ensure that integrations delivered are fully tested and operate effectively.
- Providing guidance on system configuration, ensuring that appropriate documentation and controls are in place, and contributing to change management and training strategies to support smooth adoption.
- Analysis of current data and future requirements, overseeing the successful archival / migration of financial data from the current system to the new cloud-based solution.
- Proactively identifying and mitigating any risks with the current processes and new solution, troubleshooting technical and operational issues, and ensuring that development work aligns with both finance best practices and regulatory compliance.
- Managing system specific deliverables, ensuring that all functional and technical developments meet user needs and university policy. The postholder will need to familiarise themselves with and understand the operational requirements of the University. Their work will impact all areas of financial operation across the university, including transactional, procurement, budgeting, reporting, and compliance.
- Delivering training sessions and materials to staff on the financial systems. The post holder must demonstrate a confident communication style and be responsive to the needs of their audience to ensure the professional and effective delivery of information.

**Person Specification** This section describes the sum total of knowledge, experience & competence required by the post holder that is necessary for standard acceptable performance in carrying out this role.

| Qualifications and Professional Memberships | |
|---|---|
| Degree, HND, NVQ qualified and significant experience <br> OR <br> Significant relevant experience in a finance systems role. | E |
| Qualified Accountant (CCAB or equivalent) | D |

| Technical Competencies (Experience and Knowledge) This section contains the level of competency required to carry out the role (please refer to the Competency Framework for clarification where needed and the Job Matching Guidance). | Essential/ Desirable | Level 1-3 |
|---|---|---|
| Proven track record of successful software/application deployment and administration | E | 3 |
| Experience of developing reports from relational databases using SQL | E | 2 |
| Ability to communicate effectively with specialist IT staff e.g. DBA's | E | 2 |
| Relevant Agresso / Unit 4 experience | E | 3 |
| MS Office skills | E | 3 |
| ARC, RERX and Excelerator skills | E | 2 |
| Understanding of service management concepts & disciplines e.g. ITIL version 3 | D | n/a |
| Experience of working in an HE environment | D | n/a |

| Special Requirements: | Essential/ Desirable |
|---|---|
| The Systems Team will support and develop all areas of the Unit 4 system. Individual members of the team will each be expected to demonstrate technical competencies that complement the rest of the team to ensure all areas of functionality are provided for. | E |

| **Core Competencies** This section contains the level of competency required to carry out this role. (Please refer to the competency framework for clarification where needed). n/a (not applicable) should be placed, where the competency is not a requirement of the grade. | **Level 1-3** |
|---|---|
| Communication | 3 |
| Adaptability / Flexibility | 3 |
| Customer/Client service and support | 2 |
| Planning and Organising | 2 |
| Teamwork | 2 |
| Continuous Improvement | 3 |
| Problem Solving and Decision Making Skills | 3 |
| Leadership / Management | n/a |
| Creative and Analytical Thinking | 3 |
| Influencing, Persuasion and Negotiation Skills | 1 |
| Strategic Thinking | 1 |

This Job Purpose reflects the core activities of the post. As the Department/Faculty and the post holder develop, there will inevitably be some changes to the duties for which the post is responsible, and possibly to the emphasis of the post itself. The University expects that the post holder will recognise this and will adopt a flexible approach to work. This could include undertaking relevant training where necessary.

Should significant changes to the Job Purpose become necessary, the post holder will be consulted and the changes reflected in a revised Job Purpose.

## Organisational/Departmental Information & Key Relationships

### Background Information

- A key role in the system migration, ensuring the University's finance system is sustainable, scalable, and fit for future needs.

- Will be a key liaison between Finance, IT, and consultants, to ensure the system meets both operational and strategic needs.

- Assisting in the documentation of software developments and system configurations in line with University policy and user requirements.

- Will support the integration of Unit4 with other University systems and assist in the resolution of technical issues.

- Monitoring risks and issues, maintaining a high standard of project governance and stakeholder communication.

- The post holder will have regular and frequent contact with end-users, Finance, Procurement and IT staff as well as external consultants.

- Responsible for ensuring the system is built to comply with regulatory, audit, and data protection standards.