



**Augmentations/Reallocations
Request to Classify Form**
(This form is not needed for a change in FTE)



Instructions: Please submit the Request to Classify Form for each new position or reallocation of an existing position to Irene Espinoza, in the Human Resources Department (HRD). HRD will notify you regarding the status of your request or if additional information is necessary. **Please attach a copy of the current and proposed organizational chart depicting the proposed position. Both organizational charts must reflect current FTE's (filled and vacant).**

Department/Division: Auditor-Controller – Systems

Current Budget Unit Number: 1110 - 8373

New Budget Unit Number:
(if applicable) _____

Department Contact for Information: Name: Nairi Davis

Phone: 831-755-5092

Select Corresponding Position Status Maintenance Code (PSTS) for Position Status Maintenance Transaction (PSMT):		Insert # of Requested Allocations (same class only)
<input checked="" type="checkbox"/> New Allocation	Enterprise Resource Planning Business Analyst	1
<input type="checkbox"/> Reallocation, Filled Position	[Insert Current Classification Title]	
<input type="checkbox"/> Reallocation, Vacant Position	[Insert Current Classification Title]	

Estimated % of total time spent on task/duty (column should equal 100%)	DESCRIPTION OF TASKS/DUTIES TO BE PERFORMED Use a separate paragraph for each task or duty. Attach additional sheets as necessary. <u>Do not include verbiage directly from the class specification.</u> <i>(Please note rows will expand to allow for thorough description of task/duty)</i>
5%	Annually, will help configure information for the 1099 Reporting. This task typically spans from October through March. This task includes preparation of data, applying tax patches, interface with the Taxport system, assisting with the printing of forms, and form corrections, data query, as well as any additional support requested by the Accounts Payable Division SMEs.
5%	Will configure and maintain approved centralized and decentralized chart of accounts elements, accounting periods, calendar dates, bank holidays, and bank accounts etc. in the financial system.

5%	Will configure and maintain user access via security roles and rules; document workflow conditions, approval rules and roles.
5%	Will help maintain Advantage Financial Systems' (FIN) Interfaces with various other systems. There are approximately 50 inbound and outbound FIN interfaces from several departments and systems.
18%	<p>Will provide user support to approximately 300 users from various County Departments such as but not limited to:</p> <ul style="list-style-type: none"> • Will help respond to and analyze the end user issues and ServiceNow incidents filed. • Will provide data by writing ad-hoc SQL queries • Will provide user access - add a new user, remove a user, add/remove security roles, modify security roles • Will manage workflow - move documents out of workflow, reassign, update workflow rules • Resolves payroll and vendor check printing issues. • Analyzes and researches document errors. • Analyzes Sympro, Convey Sovos Taxport related issues.
8%	<p>Maintenance and development of InfoAdvantage Reports:</p> <p>Maintains a list of reports and documents their purpose. Creates new reports; and modifies existing reports as requested. Currently there are approximately 88 total FIN reports; 38 PB reports.</p>
15%	<p>Will assist in the Budgeting Cycle for the County by maintaining the Performance Budgeting (PB) system. This task is performed during the 7-month budget preparation season from November through June:</p> <ol style="list-style-type: none"> 1) Configures current year and 3-year forecast budgets for next Fiscal Year Budget preparation by departments. 2) Configures baseline budgets and clears prior year's augmentation requests. 3) Maintain PB Interfaces: inbound and outbound PB interfaces (from/into HRM and FIN) <p>There are over 240 tasks within the Performance Budgeting task list involving Central HR, Programmers, Business Analyst, Budget Analysts, and Database Administrators. Business Analysts leads the process of getting the PB system ready for use by the end-users.</p>

10%	<p>Daily and as needed will work on the following operational tasks, including but not limited to:</p> <ul style="list-style-type: none"> • will verify batch job log for any job failures in the system and coordinate with end users and technical staff in resolving the issues • will analyze any rejected documents created by batch jobs, and will resolve issues • will assist payroll staff and other end users by providing information on payroll accounting entries in Financials. • will verify that the system date, accounting period, and disbursement parameters are correct, which is essential for correctly posting financial transactions. • will ensure that Bank received 'issued Check' file and sent back 'Paid check' file. Will ensure Check Reconciliation job runs and updates the records with 'Paid' status. This is essential for proper disbursement. • will verify successful runs of System Assurance jobs. The system assurance jobs are essential for integrity of the system. • ensures ("Extract, Transform and Load (ETL) process is run within the system and the data warehouse is updated. The process is necessary for InfoAdvantage data to be updated. • Document new procedures and update existing documentation • Manage environment refresh schedules and usage by different teams and individuals for several purposes. • Act as a liaison between Functional and Technical teams, coordinate with ITD on system infrastructure, with Programmers and Database Administrator (DBA) for technical support. • Supports existing information systems by monitoring the various systems, interfaces, processes, and/or components
4%	<p>Will attend weekly CSG calls and get/provide updates on outstanding items; will plan and coordinate patch application and test and arrange User Acceptance Testing (UAT) and once accepted by User, arrange deployment for Production</p>
10%	<p>Annually will work on the following operational tasks, including but not limited to:</p> <ul style="list-style-type: none"> • extract information from the system to General Accounting for the hard close, test data, and perform the hard close of the previous fiscal year. This task is performed during February timeframe. • performs Purchase Order (PO) lapse process at the end of fiscal year. • will provide support to General Accounting Division during the CAFR season, such as but not limited to: (1) Open and close accounting periods for the CAFR Adjustments to be posted by the GA. (2) Run mass depreciation for the incorporation for the CAFR and independent auditors. (3) Run SQLs or develop reports as necessary based on independent auditor requests. • will support the following clean-up efforts in the system (1) Vendor clean-up, (2) commodity code clean-up, (3) location code cleanup (4) user clean-up.

9%	<p>Will provide support for FIN to Accounts Payable and General Accounting Divisions of ACO.</p> <p>Will provide support for Vendor Self Service (VSS) to Contracts & Purchasing Division of the CAO's office throughout the year.</p> <p>Will provide support for PB to County Administrative Office's Budget & Analysis Division, and departments.</p>
1%	Assess and apply new technology to resolve business problems
5%	Will be responsible for documenting the tasks performed and create training materials for future Business Analyst staff, and end users.

JUSTIFICATION FOR REQUEST: Describe what changes have occurred (i.e., new legislative mandates, departmental reorganization, new services, new equipment, etc.) that necessitate the need for an additional position. Explain why duties cannot be absorbed by another existing position. Describe consequences or ramifications if the position is not approved. *[Please note field(s) will expand to allow space for justification]*

The Auditor Controller's System Division has been understaffed since July 1, 2018. At the beginning of the fiscal year 2018-19, the Systems Division lost four Business Analyst positions, reducing the workforce by 50%. However, the workload has not been reduced to match staffing levels.

Of the four Business Analyst positions remaining, three are responsible for maintaining the HRM/Payroll related systems and interfaces. There is only one Business Analyst servicing and providing support for the Advantage Financials (FIN) and Performance Budgeting (PB) modules.

The reduced workforce has caused deficiencies: an inability to cross train, delayed response times to customers/department users, reduction in services provided, and the lack of a backup for the Business Analyst assigned to FIN and PB. This has created a situation where the one remaining FIN Business Analyst has become a single critical point of failure.

Examples of the above listed deficiencies and delays in service include:

1. A key task (Budget Recalculation) to prevent accounting documents being posted to a wrong fiscal year, had been delayed until March 2019, which caused the delay of the hard close of the previous FY.
2. The Performance Budgeting system reconfiguration for the budget season has taken longer causing delays in the expected timelines, PB training for the department users, and response times department user inquiries in other areas of FIN.
3. Evaluating, resolving and responding to customer service requests through ServiceNow, is one of many duties of an ERP Business Analyst. As of December 19, 2019, there are 68 open incidents of which 64 have been waiting to be resolved for over 60 days according to the data compiled by the Information Technology Department.

The lack of adequate resources and the single critical source of failure negatively impacts the operations of the county. When our customer service to our County departments suffer, their levels of service suffer as well.

Were the new duties previously performed by another position(s)?

No Yes (If yes, what is/are the job title(s) of the other position(s)?)

ERP Business Analyst

Is there any other position(s) within the department performing in a similar capacity assigned comparable duties to this position?

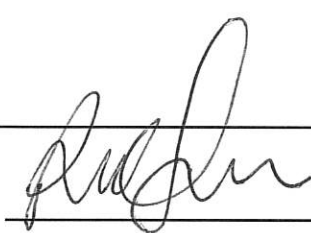
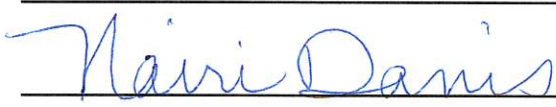


No Yes (If yes, what is/are the job title(s) of the other position(s)?)

ERP Business Analyst

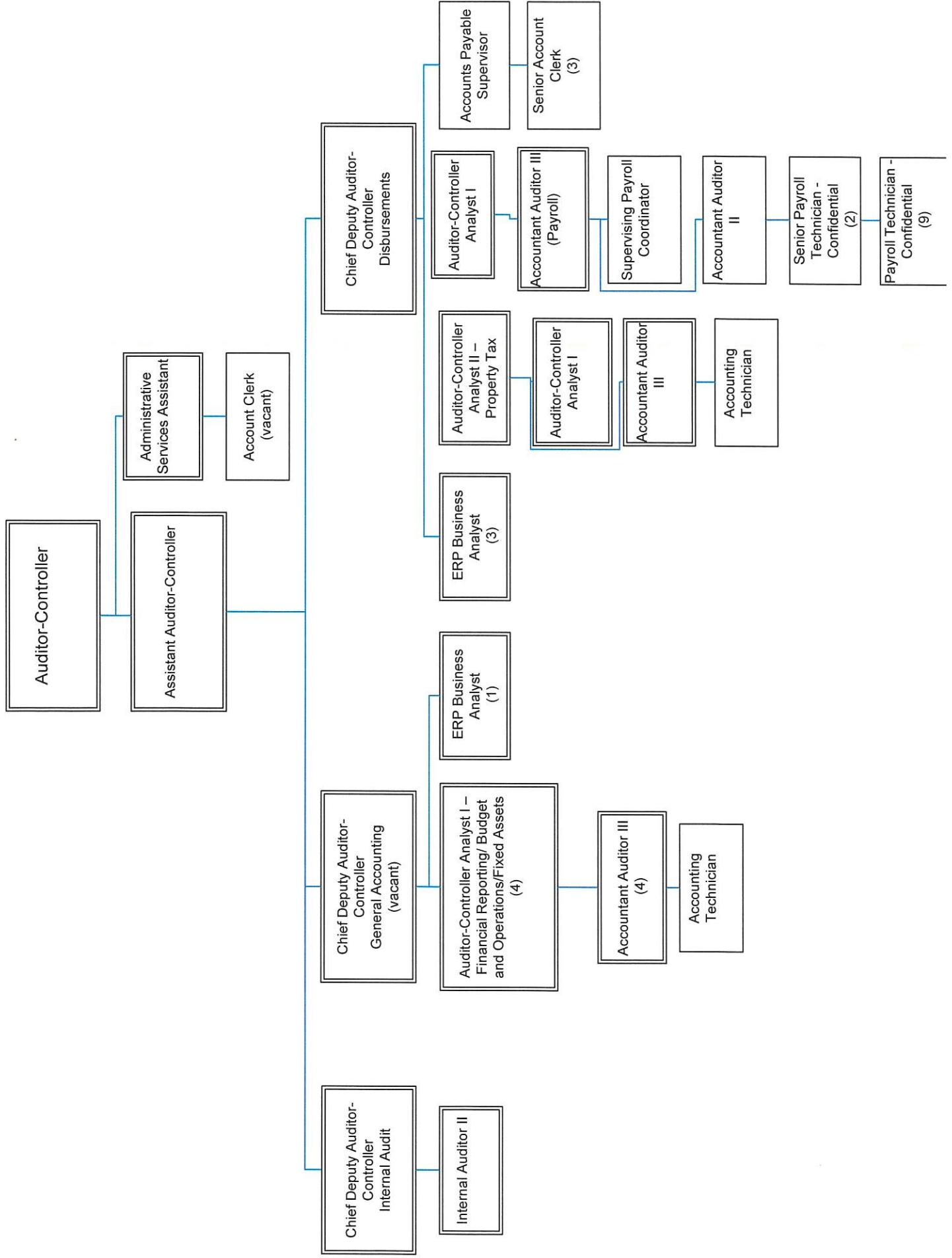
Has reappportioning duties among currently available positions to avoid adding an additional position been considered?

No Yes (If no, explain why this is not a viable alternative)

50% reduction of ERP Business Analyst positions last fiscal year has caused the current workload issues. Please see justification.

DEPARTMENT HEAD:	
Comments:	
Department Head Signature: <u></u>	Date: <u>12/19/19</u>
DEPARTMENTAL HR ANALYST:	
Class Recommendation: <u>ERP Business Analyst</u>	Class Code: <u>14P32</u>
Departmental HR Analyst Signature: <u></u>	Date: <u>12/19/19</u>
FOR HRD USE ONLY:	
Approved Class Title: <u>ERP Business Analyst</u>	Class Code: <u>14P32</u> 
HRD Classification Analyst Signature: <u></u>	Date: <u>01/03/20</u>
Distribution of HRD Job Class Determination:	
<input type="checkbox"/> Rocio Quezada (CAO - Admin. Secretary) <input type="checkbox"/> CAO Budget Analyst	
<input type="checkbox"/> Departmental HR Analyst	

Auditor-Controller 2019 – 2020 Organization Chart



Auditor-Controller 2019 – 2020 Proposed Organization Chart

