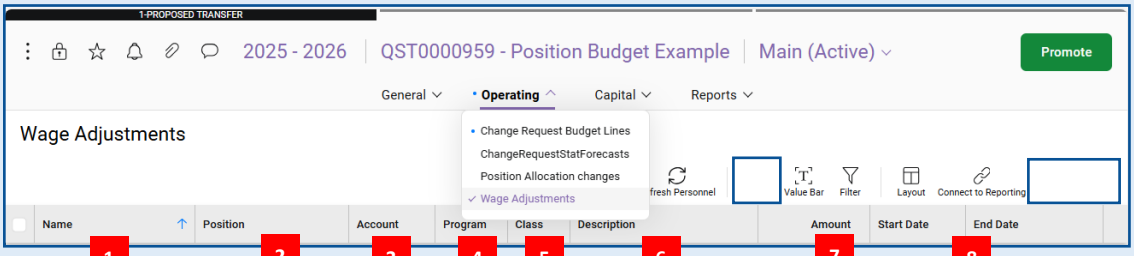
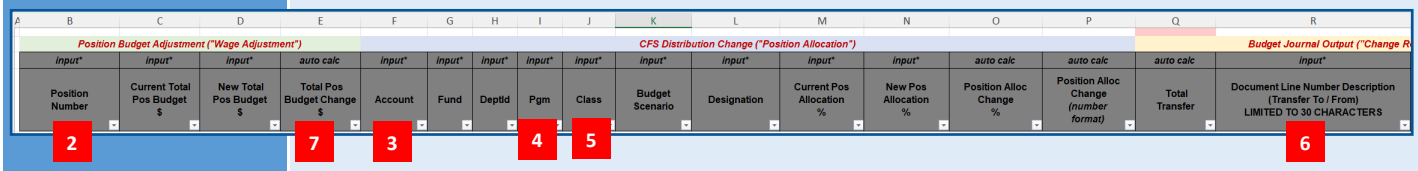
QUICK REFERENCE GUIDE

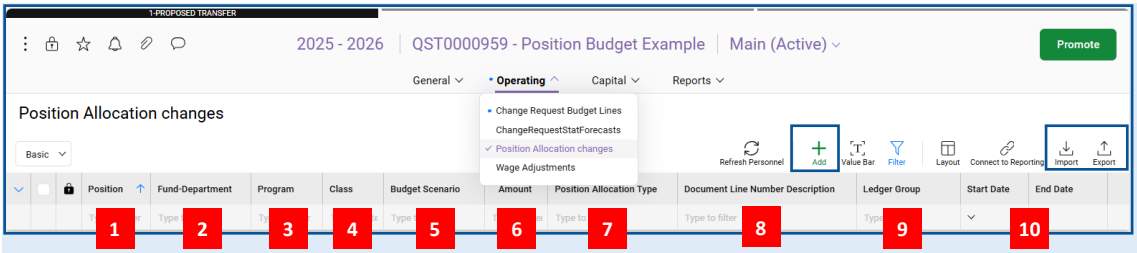
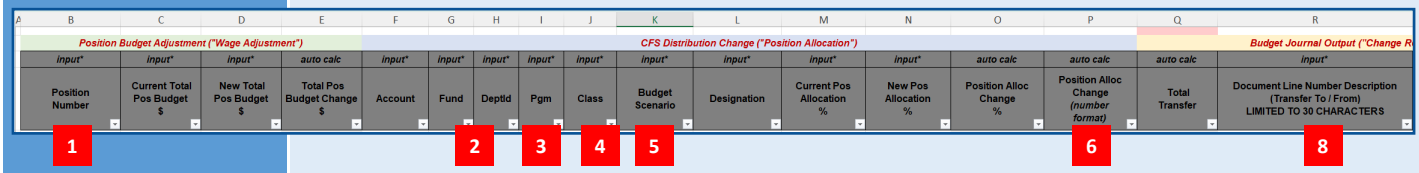
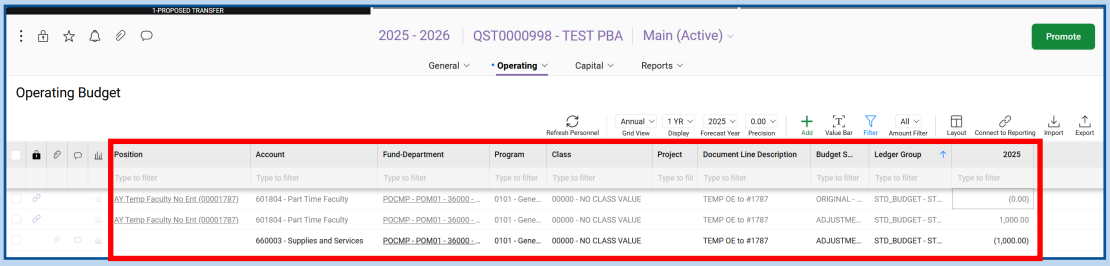
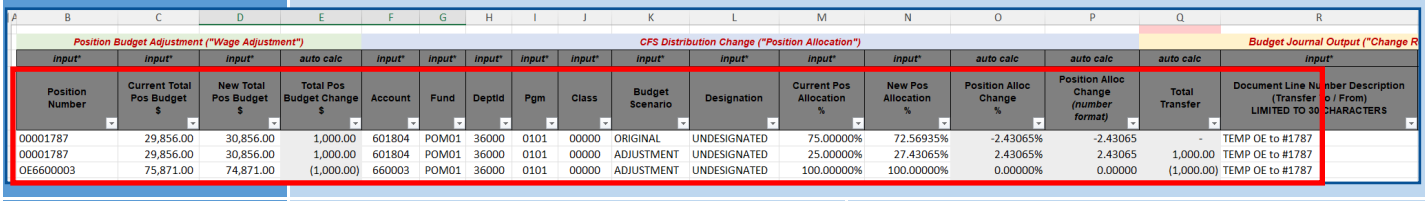
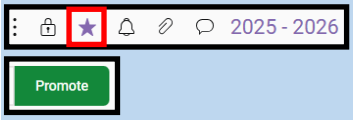
Questica Position Budget Adjustment (PBA)

Cal Poly Pomona

Administrative Affairs
Budget Planning & Analysis

Summary guide of how to submit an Position Budget Adjustment (PBA) through Questica.
Please visit Budget Planning & Analysis website for additional training materials and forms.
Links: Tableau | Questica Production | Position Budget Adjustment Template (XLSX)
Request Tableau Access | Request Questica Access | Inactive Dept IDs | Salary & Wage Acct Codes

	Navigation	Instructions
1. Prepare Backup Documentation	PBA Excel Template Tableau – Questica Position Budget Current Fiscal Year / Position #(s) Tableau— Custom View (OE) funding Fund / Dept ID / Program / Class / Account	PBA Excel Template: Backup documentation of wage adjustments and/or position allocation changes. Tableau Questica Position Budget: show sufficient funds in positions. Tableau Custom View: show sufficient funds in OE account.
2. Create New Transfer Record in Questica	Budgeting > Change Requests > Change Requests Change Request Home Page > 	Department: Requestor's Home Dept ID Fund: Fund used in Transfer Change Request Type: Position Budget Adjustment Journal Line Ref: Auto populated Journal Line (Title): PBA - Period - Division - Descr Brief Description: PERM or TEMP (action) PERM - ongoing action TEMP - one-time action Include Position Information Example: "PERM OE to #1111"
3. Save Transfer Backup Documentation in Change Request	Top Left > Paperclip Icon   OR Drag and Drop	Required: PBA Excel Template Save prepared backup documentation from Tableau Questica Position Budget, Custom View, or other documents (e.g. emails, forms, etc.).
4. Enter Transfer into Questica **Wage Adjustments**	  1 - Name: "PBA - Description"; "PBA" is required at the to identify the change request transaction. 7 - Amount: When using the export/import function, negative amounts must be formatted with a dash, not parenthesis. 8 - Start Date: July of the current fiscal year (July 2025) - End Date: Determined based upon the action of the transaction. If PERM/ongoing, leave blank. The change will carry over in the next fiscal year. If TEMP/one-time, enter in an end date (June of FY) and the transaction will not carry over into the next fiscal year.	

	Navigation	Instructions
5. Enter Transfer in Questica **Position Allocation Change** **(Not required if there are zero Position Allocation Changes - Column P)**	  6 - Amount: When using the export/import function, negative amounts must be formatted with a dash, not parenthesis. 7 - Position Allocation Type: Percentage 9 - Ledger Group: STD_BUDGET 10 - Start Date: July of the current fiscal year (July 2025) - End Date: Determined based upon the action of the transaction. If PERM/ongoing, leave blank. The change will carry over in the next fiscal year. If TEMP/one-time, enter in an end date (June of FY) and the transaction will not carry over into the next fiscal year.
6. Enter Transfer in Questica OE	Operating > Change Request Budget Lines	Follow Operating Expense Change Request Instructions
7. Verify Questica Change Request Budget Lines with PBA Excel Form **(Ensure dollar amounts in Questica match Excel by CFS & Scenario)**	 
8. Make Change Request a Favorite & Promote Transfer		Select Star Icon to file as Favorite. Select Promote Button > Option 2 > Next > Save

Requirements

- "Brief Description" Summarizes Transfer Action with Position Numbers, "PERM", "TEMP", "OE"
- Journal Line Title (Naming Convention):
  PBA - *Accounting Period - Division - Description of Transfer*
- Upload PBA Excel Template and Tableau back-up documentation in Change Request
- Transfer nets to Zero: By Fund; By Scenario; By Designation
  Cross transfers are NOT allowed
- Use appropriate chartfield values:
  - No transfers between Revenue Accounts
  - Positions: Salary Accounts Only
  - OE Lines: Salary Accounts are Prohibited
    List of Salary & Wage Account Codes
  - Do not use Inactive Department IDs & Account Codes
    List of Inactive Dept IDs
    List of Inactive Account Codes