



Budget Development in Questica

Navigation & Budget Tools

February 2025

Learning Outcomes

- Annual Budget Development at CPP
- General Navigation
- FY2025/26 Budget Development Deadlines
- Building Operating Budget
- Submitting Operating Budget
- Questions?



Cal Poly
Pomona



Annual Budget Development at CPP





Annual Budget Development at CPP

- Budget Assumptions & Strategies
 - Building your annual budget has not changed.
 - Goal of budget planning is to create a *balanced* and *sustainable* ongoing budget that supports the University's strategic plan, mission, and vision.
 - An all-funds budgeting approach provides *an enterprise-wide view* of fiscal resources and ensures resource allocation decisions are made with an understanding of all available funding sources and uses.
 - Easier to fully build your budget up-front than make mid-year changes.
 - Enrollment: 22,688 Resident FTES
 - CY Headcount: 26,810 plus 3,001 for Self-Support
 - Fees: build in contingency in enrollment
 - Re-consider investments that will trigger recurring expenses.
 - Use existing resources, i.e. software, or identify less expensive alternatives.
 - Use Quarterly Report projection for year-end available balance for carry-forward allocation.



Building Annual Operating Budget in Questica

- Funds
 - All State Oper Funds (SOF)
 - POM01 (General Fund Allocation)
 - Lottery
 - TY006 – Educational Access Academic Development
 - TY017 – California Pre Doctoral
 - TY033 – General Campus Based Programs
 - Cost Recovery
 - PCR01 – Internal Sources
 - PCR02 – External Sources
 - PCR04 – Academic Facility Space Rental
 - PCR05 – Theatre Space Rental
 - PCR06 – Film & Photo Shoot Space Rental
 - PCR07 – Capital Project Management
 - PCR10 – AB 798 Textbook Affordability
 - Trusts
 - TX130 – Lanterman (Administrative Affairs)
 - TX140 – Edu Access Academic Development (Academic Affairs)



Building Annual Operating Budget in Questica

- Funds Continued
 - All State Oper Funds (SOF) Continued
 - State Grants
 - POS01 – CSUPERB Grant
 - POS02 – COAST Grant
 - POS03 – AG Research Institute
 - POS04 – WR&PI Grant
 - POS05 – RSCA Awards Program
 - POS06 – STEM NET Mini Grant
 - SP003 – Sup Agric Research Ins IPM Program
 - SP004 – College Student Right to Access Program



Building Annual Operating Budget in Questica

- Funds Continued
 - Auxiliary Enterprises (Spending Plans)
 - College of Professional and Global Education
 - TM001 – TF PaCE-Expenditure
 - TM002 – TF PaCE-Campus Partners
 - TM500 – TF PaCE-Special Summer
 - TM502 – TF PaCE-Special Winter
 - Housing
 - TZ001 – Housing-Operations and Revenue
 - Parking & Rideshare
 - TV002 – Parking Fines/Forfeitures Exp
 - TW001 – TF PRF-Expenditures



Building Annual Operating Budget in Questica

- Cost Recovery Budgeting
 - Annual budget allocation is tied to recurring revenue.
 - PCR01 – Plan for 80% of FY24/25 revenue posted.
 - PCR02 – Plan for positions tied to approved MOUs, etc.
 - Examples: approved positions to be fully or partially funded by the Philanthropic Foundation, grants, cost recovery plans with Auxiliary Enterprise entities, etc.
 - Carryforward: Use projected year-end balances.
 - Budget is posted at the beginning of the year and reconciled twice in March and June.



Building Annual Operating Budget in Questica

- Financial Data
 - Revenue/Allocation
 - Enrollment Projections (Auxiliary Enterprises)
 - Annual Budget Allocation Memo (All State Oper Funds (SOF))
 - Personnel (Positions)
 - Tableau [HR Actuals](#) Dashboard
 - Position Salary Information
 - Operations (GL Account Level)
 - Tableau [Finance](#) Dashboard
 - Prior Year Actuals
 - OE&E Exercise
 - Purchase Orders – Past & Future



Building Annual Operating Budget in Questica

2025

FY25-26

2026



- Position Management Stages
 - During annual budget development, divisions determine how they plan to fund positions in Questica using Positions and Position Allocations entities. The initial budget submitted becomes the *adopted budget*.
 - Once a budget is submitted, we go into the maintenance phase, where changes to the position listing must be processed as *transfers* that *net to zero*. Position budget adjustments submitted outside of the annual budget stage are called *off-cycle* adjustments. The process is very similar to how we manage our General Operating Fund.
- Operation Budgets
 - Once the department's annual budget has been established, it is not necessary to zero-out deficits by account (CFS).
 - Total operating budget must not result in a deficit; must remain in the "black."



Building Annual Operating Budget in Questica

- Position Management Principles

- When allocating General Fund (POM01), base-fund permanent positions whenever possible.
- Align funding type with permanent or temporary positions.
- Will need to budget for benefits except for Undesignated and Designated POM01-funded positions, which are managed centrally by BP&A.

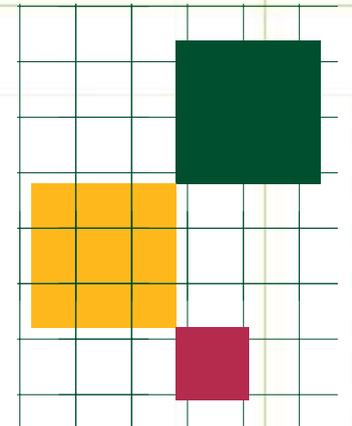
✓ *All State Oper Funds (SOF)*

- If a new position has been created in PS and needs be added into Questica, please reach out to Debbie Chavez (debrachavez@cpp.edu).
- There should only be one template (holding) position for salary savings for each division, which should be in the VP's Office. There should not be FTE tied to these positions.
- If you have plans to fill a position in the future, place the funding and FTE in an existing position.

✓ *Both*



General Navigation





General Navigation Focus Points

User Log In – Sandbox

I. Menu & Sub Menu Options

II. Menu Icons

III. Grid / Screen Features



Main Menu

Menu Ribbon Icons



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Dashboard

My Tasks ⁴⁸

Budgeting ▾

Reports ▾



62



Debra Chavez ▾

Search Anything [CTRL + SPACE]



Campus User ▾

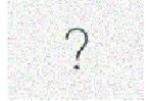
Campus User Change Request Status Report

Change Request Journal Line Ref (ex: ALB18-00...	Change Request Journal Line (Title)	Change Request Pu...	Change Request Stage Stage Name	Snapshot Change R...
QST0000219	REPURPOSE		1-Proposed Transfer	2024-12-09 4:18:26 PM
QST0000219	REPURPOSE		1-Proposed Transfer	2024-12-09 4:18:29 PM
QST0000272	REPURPOSE		1-Proposed Transfer	2024-12-11 11:54:25 AM
QST0000273	REPURPOSE		1-Proposed Transfer	2024-12-13 8:36:22 AM
QST0000335	BT - 07 - ACAD - 20120 - Move Funds from S&S to D...		1-Proposed Transfer	2025-01-27 11:02:52 AM
QST0000340	BT - 07 - ACAD - 23000 - Transfer to PCR01-AH369 - ...		1-Proposed Transfer	2025-01-29 11:30:06 AM
QST0000266	BT - 07 - ACAD - 20120 - Transfer to 50400 - 1636		1-Proposed Transfer	2025-02-05 10:46:03 AM
QST0000335	BT - 07 - ACAD - 20120 - Move Funds from S&S to D...		1-Proposed Transfer	2025-02-07 9:55:18 AM

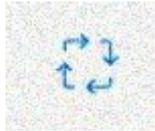




Menu Ribbon Icons



Questica Search Feature -
Current screen



Batch Processes – export/import of
grid lines and reports, approvals &
publishing & export of reports



Budget Calendar



Bookmark – screens, change
requests



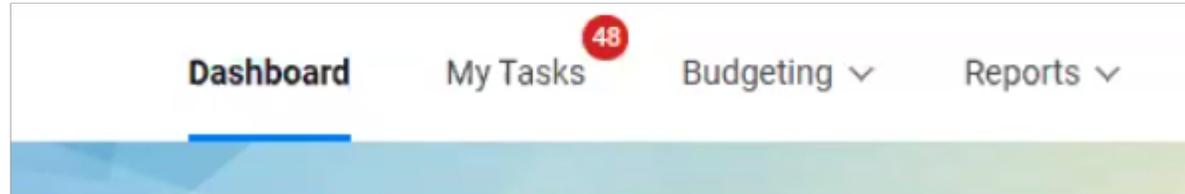
Notifications – @-mentions



User Name – Profile
Settings & Sign Off



4 Menu Options



- 1. Dashboard** - Dashboards display information with visualizations, (charts, graphs, reports and counters) on one screen. A dashboard's intent is to summarize information to keep users up to date on what's happening and indicate whether action is required.
- 2. My Tasks** - Identifies items a *Questica Budget* user is responsible for and lists them on the *My Tasks* page. It is an easy and simple way for Users to find and open their work when logged into the system. A notification badge lets you know when new tasks have been assigned. The system manages the items by *date* and *security* settings.
- 3. Budgeting** - Contains 7 sub menus of which 3 will be frequently used by campus users. Operating, Personnel, and Change Request sub-menus
- 4. Reports** - The *Report Center* displays a list of all available *Print Reports*, *Smart Reports* and *Views*. The Report Center provides several ways to find and run new Reports, as well as bookmark your favorite ones.



1. Questica Dashboard



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Dashboard

My Tasks ⁴⁸

Budgeting ▾

Reports ▾



Smart Report

Search Anything [CTRL + SPACE]



Campus User ▾

Campus User Change Request Status Report

Change Request Journal Line Ref (ex: ALB18-00...	Change Request Journal Line (Title)	Change Request Pu...	Change Request Stage Stage Name	Snapshot Change R...
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QST0000272	REPURPOSE		1-Proposed Transfer	2024-12-11 11:54:25 AM
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QST0000335	BT - 07 - ACAD - 20120 - Move Funds from S&S to D...		1-Proposed Transfer	2025-02-07 9:55:18 AM



Search





1. Questica Dashboard

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Dashboard My Tasks ⁴⁸ Budgeting ▾ Reports ▾

Search Anything [CTRL + SPACE]

Changing Dashboard View

Campus User ▾

- Campus User
- Position Management
- Questica Dashboard

Status Report

Change Request Pu...	Change Request Journal Line (Title)	Change Request Pu...	Change Request Stage Stage Name	Snapshot Change R...
	REPURPOSE		1-Proposed Transfer	2024-12-09 4:18:26 PM
	REPURPOSE		1-Proposed Transfer	2024-12-09 4:18:29 PM
	REPURPOSE		1-Proposed Transfer	2024-12-11 11:54:25 AM
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1. Questica Dashboard



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Dashboard My Tasks Budgeting Reports Administration

? Refresh Calendar Star Bell Debra Chavez

Smart Report

Search Anything [CTRL + SPACE]

Position Management

Arrange Widgets Add Widget Edit Dashboard New Dashboard

Position Budget Detail Report

Budget Year	Fund	Fund-Department	College/Area	Position Allocation ...	Position Allocation ...
2024 - 2025	POCMP - POM01 - OPERATING FUND	POCMP - POM01 - 23100 - OPERATING FUND - Hum...	22200 - Dean College of Agriculture	100.000	2,08
2024 - 2025	POCMP - POM01 - OPERATING FUND	POCMP - POM01 - 72600 - OPERATING FUND - Publ...	72600 - Public Safety	100.000	2,08
2024 - 2025	POCMP - POM01 - OPERATING FUND	POCMP - POM01 - 45200 - OPERATING FUND - Indu...	44600 - Engineering Dean's Office Sppt	100.000	2,08
2024 - 2025	POCMP - POM01 - OPERATING FUND	POCMP - POM01 - 36000 - OPERATING FUND - CCH...	36100 - Dean Collins Hospitality Mgmt	-1.395	2,050.8
2024 - 2025	POCMP - TZ001 - HOUSING - OPER AND REVENUE	POCMP - TZ001 - 19500 - HOUSING - OPER AND RE...	19900 - Housing Administration	100.000	2,08
2024 - 2025	POCMP - POM01 - OPERATING FUND	POCMP - POM01 - 20001 - OPERATING FUND - VP ...	16900 - Academic Programs	-7.868	32,146.
2024 - 2025	POCMP - POM01 - OPERATING FUND	POCMP - POM01 - 50000 - OPERATING FUND - Che...	49700 - Dean College of Science	101.395	2,050.8
2024 - 2025	POCMP - POM01 - OPERATING FUND	POCMP - POM01 - 64700 - OPERATING FUND - Heal...	62000 - AVP Health & Wellbeing	100.000	2,08
2024 - 2025	POCMP - POM01 - OPERATING FUND	POCMP - POM01 - 31600 - OPERATING FUND - Phil...	29600 - Dean College Ltrs Arts Soc Sci	-16.236	
2024 - 2025	POCMP - POM01 - OPERATING FUND	POCMP - POM01 - 34720 - OPERATING FUND - Clou...	34700 - Information Technology	100.000	2,08
2024 - 2025	POCMP - POM01 - OPERATING FUND	POCMP - POM01 - 55400 - OPERATING FUND - Ethn...	29600 - Dean College Ltrs Arts Soc Sci	101.395	2,050.8
2024 - 2025	POCMP - POM01 - OPERATING FUND	POCMP - POM01 - 21700 - OPERATING FUND - Aca...	20000 - VP Academic Affairs Office	100.000	2,08
2024 - 2025	POCMP - POM01 - OPERATING FUND	POCMP - POM01 - 73700 - OPERATING FUND - Pres...	73700 - President's Office	100.000	2,08



2. My Tasks

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Dashboard **My Tasks** Budgeting Reports Administration

My Tasks Search Tasks

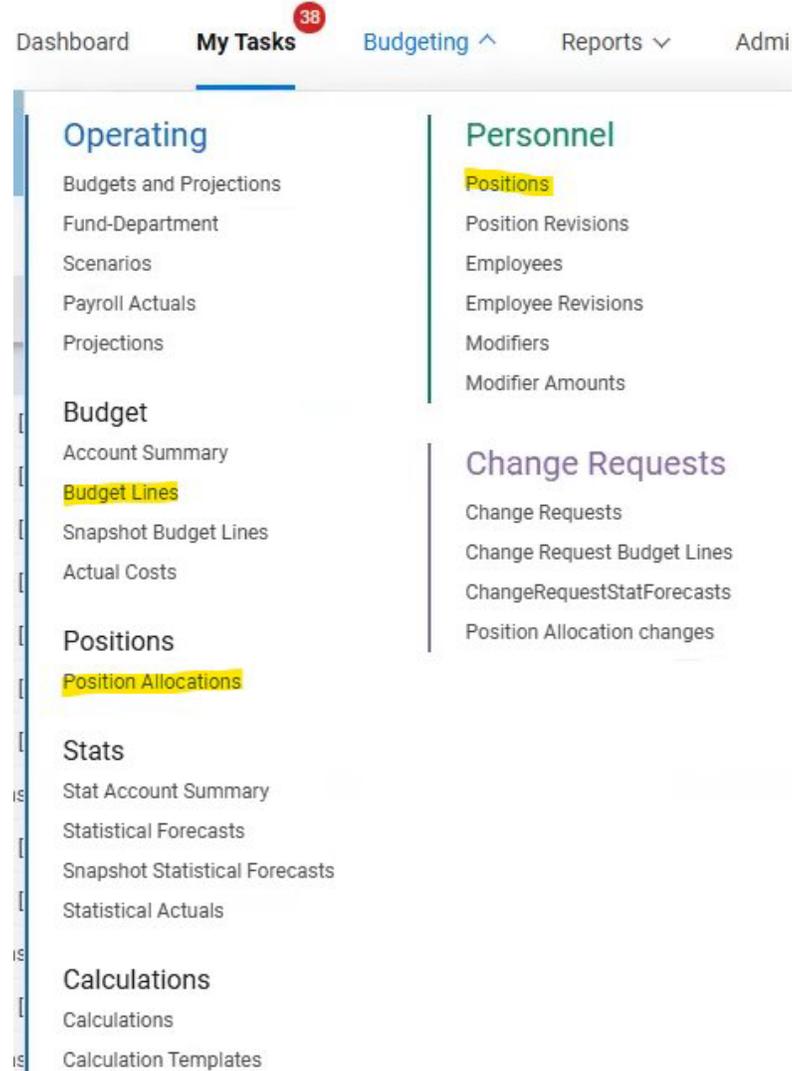
Current Tasks All Deadlines

Budget Year	Task	Stage	Department	Entity
Entity: Change Request				
2024 - 2025	QST0000274 - PBA - 06 - ACAD - 21700 PSN BASE GI2025 C3361	3-Final Approval [Position Budget Adjustment]	21700 - Academic Resources	Change Request
2024 - 2025	QST0000281 - PBA - 06 - ACAD - 21700 - TF ALLOC FOR URTPC_SENA	3-Final Approval [Position Budget Adjustment]	21810 - Academic Planning Adm	Change Request
2024 - 2025	QST0000284 - PBA - 06 - ACAD - 21810 - LRGC	3-Final Approval [Position Budget Adjustment]	21810 - Academic Planning Adm	Change Request
2024 - 2025	QST0000286 - PBA - 06 - ACAD - 20000 - #TTF-GI25 to Various	3-Final Approval [Position Budget Adjustment]	20001 - VP Academic Affs Instru...	Change Request
2024 - 2025	QST0000287 - PBA - 06 - ACAD - 20001 - #TF-UNDE to Various	3-Final Approval [Position Budget Adjustment]	20001 - VP Academic Affs Instru...	Change Request
2024 - 2025	QST0000290 - PBA - 06 - ACAD - 20001 - #TF - UNDE to Various 2	3-Final Approval [Position Budget Adjustment]	20001 - VP Academic Affs Instru...	Change Request
2024 - 2025	QST0000292 - PBA - 06 - ACAD - 20001 #ITF-GI25 to Various	3-Final Approval [Position Budget Adjustment]	20001 - VP Academic Affs Instru...	Change Request
2024 - 2025	QST0000293 - PBA - 07 - STAF - 63000 - PSN #6098	1-Proposed Transfer [Position Budget Adjustment]	21300 - Kellogg Honors College	Change Request
2024 - 2025	QST0000294 - PBA - 06 - ACAD - 20001 - #TF-UNDE to Various	3-Final Approval [Position Budget Adjustment]	20001 - VP Academic Affs Instru...	Change Request
2024 - 2025	QST0000299 - PBA - 06 - ACAD - ABC ALLOCATION 1690	3-Final Approval [Position Budget Adjustment]	21700 - Academic Resources	Change Request
2024 - 2025	QST0000300 - REPURPOSE	1-Proposed Transfer [Position Budget Adjustment]	21700 - Academic Resources	Change Request
2024 - 2025	QST0000302 - PBA - 06 - ACAD - 21700 - PSN BASE & ONETIME MULTI	3-Final Approval [Position Budget Adjustment]	21700 - Academic Resources	Change Request
2024 - 2025	QST0000304 - REPURPOSE	1-Proposed Transfer [Position Budget Adjustment]	29800 - CLASS Redistribution	Change Request
2024 - 2025	QST0000307 - PBA - 06 - ACAD - 29800 - CLASS GI2025	3-Final Approval [Position Budget Adjustment]	29800 - CLASS Redistribution	Change Request
2024 - 2025	QST0000308 - PBA - 06 - ACAD - CPGE - PSN RECON	3-Final Approval [One-Sided: Position Budget Adjust...]	18800 - PaCE-Admin Office	Change Request
2024 - 2025	QST0000321 - PBA - 07 - TEMP - TF - LRGC - CLASS TO VARIOUS	3-Final Approval [Position Budget Adjustment]	29800 - CLASS Redistribution	Change Request
2024 - 2025	QST0000323 - PBA - 07 - ACAD - 30000 - #1801 from Dept ID 16900	3-Final Approval [Position Budget Adjustment]	16900 - Academic Programs	Change Request
2023 - 2024	QST0000002 - PBA Temp #TF - LRGC to 601303	3-Final Approval [One-Sided: Position Budget Adjust...]	21800 - Academic Planning	Change Request
2023 - 2024	QST0000004 - PBA Temp #TF - LRGC to 601303	3-Final Approval [Position Budget Adjustment]	21810 - Academic Planning Adm	Change Request
2023 - 2024	QST0000007 - PBA Temp P#4396, To P#1824, #1826	3-Final Approval [Position Budget Adjustment]	48301 - ENV Dean's Instructional...	Change Request
2023 - 2024	QST0000009 - PBA move funds from 5140 to 5766	3-Final Approval [Position Budget Adjustment]	55800 - Library	Change Request

38 records



3. Questica Budgeting Menu



STAGE 1 of Workflow Process – INPUT & PROMOTE

Entities for *Entering* Annual Budget Data

- Budget Lines (O/E)
- Position Allocations
- Positions

Entity for *Publishing* Annual Budget Data

- Positions

Entities for *Promoting* Annual Budget Data

- Fund-Department



3. Questica Budgeting Menu

Dashboard **My Tasks** ³⁸ Budgeting ^ Reports v Adminis

- Operating**
 - Budgets and Projections
 - Fund-Department**
 - Scenarios
 - Payroll Actuals
 - Projections
- Budget**
 - Account Summary**
 - Budget Lines
 - Snapshot Budget Lines
 - Actual Costs
- Positions**
 - Position Allocations
- Stats**
 - Stat Account Summary
 - Statistical Forecasts
 - Snapshot Statistical Forecasts
 - Statistical Actuals
- Calculations**
 - Calculations
 - Calculation Templates

- Personnel**
 - Positions**
 - Position Revisions
 - Employees
 - Employee Revisions
 - Modifiers
 - Modifier Amounts
- Change Requests**
 - Change Requests
 - Change Request Budget Lines
 - ChangeRequestStatForecasts
 - Position Allocation changes

STAGE 2 of Workflow Process - REVIEW

Entities for *Promoting* Annual Budget Data

- **Fund-Department**
- **Account Summary**

Entity for *Publishing* Annual Budget Data

- **Positions**



3. Budgeting > Position Entity

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Dashboard My Tasks **Budgeting** Reports Administration

Positions | 2025 - 2026

Search Positions

All Positions

Name	Position Number	Position Status	Display N...	Account	Paid Hours	Annual Budget per FTE	Description
Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter

Let's Get Started

Try using the search tools above to find what you're looking for, or click below to retrieve all of the records.

Load Data

NOTE:

Select the proper FY
Select LOAD DATA

Fiscal Year for Annual Budget should ALWAYS BE UPCOMING FY – **NOT CURRENT WORKING FY**

Entities Affected

Positions

Position Allocation

Budget Lines



3. Budgeting > Position Allocation

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Dashboard My Tasks **Budgeting** Reports

Position Allocations **2025 - 2026** Search Position Allocations

Basic

<input type="checkbox"/>	Position Number	Document Line Number Description	Description
	Type to filter	Type to filter	Type to filter

Let's Get Started

Try using the search tools above to find what looking for, or click below to retrieve all of the 1

Load Data

NOTE:

Select the **proper FY**
Select **LOAD DATA**

Fiscal Year for Annual Budget should **ALWAYS BE UPCOMING FY – NOT CURRENT WORKING FY**

Entities Affected

Positions
Position Allocation
Budget Lines



3. Budgeting > Budget Lines

The screenshot shows the 'Budgeting' section of a web application. The top navigation bar includes 'Dashboard', 'My Tasks', 'Budgeting', and 'Reports'. The 'Budgeting' dropdown is currently open, showing 'Budget Lines' and a selected fiscal year of '2025 - 2026'. Below this is a search bar labeled 'Search Budget Lines'. The main content area features a table with columns for 'Fund-Department', 'Account', and 'Document Line Description'. A 'Load Data' button is visible at the bottom right of the table area.

NOTE:

Select the **proper FY**
Select **LOAD DATA**

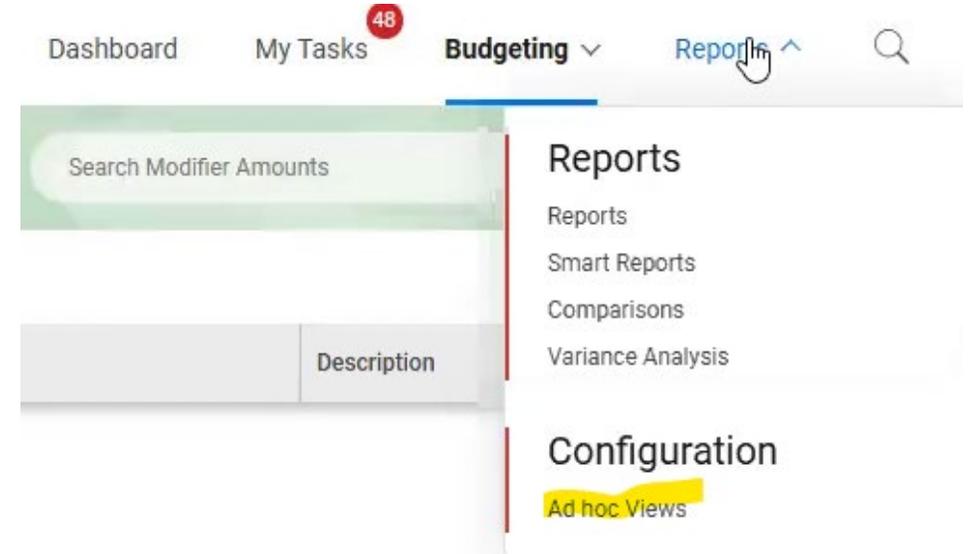
Fiscal Year for Annual Budget should **ALWAYS BE UPCOMING FY – NOT CURRENT WORKING FY**

Entities Affected
Positions
Position Allocation
Budget Lines

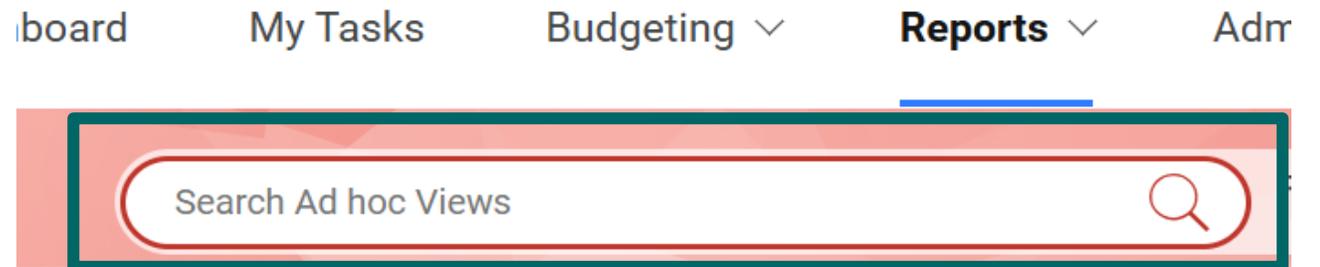


4. Reports

1. Reports > Adhoc Views



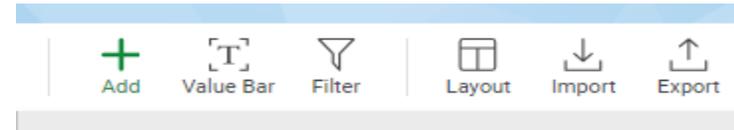
2. Search Bar : Use to Search for Report- enter Report Name



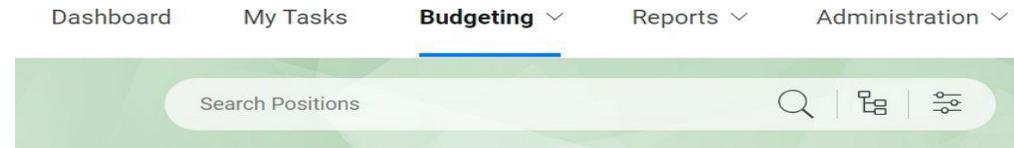


Features within Questica Grids

GRID FEATURES



SEARCH BAR



SORTING

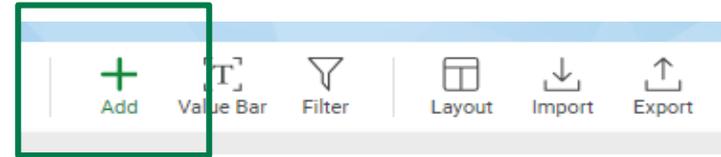
	Name	Description	Position Num...
	Type to filter	Type to filter	Type to filter
	Admin Support Coord I-12 Mo	Front Office Lea...	00000001
	Admin Analyst/Spclst NE-12 Mo	Citation and Per...	00000002

COLUMN FORMATTING

- Group By
- Freeze
- Resize to Content
- Fit on one screen



Grid Features : Add



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Dashboard My Tasks **Budgeting** Reports Administration

Budget Lines | 2025 - 2026

Search Budget Lines

Annual 1 YR 2025 0

Grid View Display Forecast Year Precision Add Value Bar Filter Layout Import

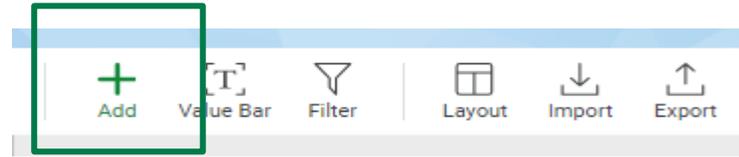
Ledger Group	Fund-Depart...	Account	Program	Class	Budget Scenario	Document Line Number
Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter
STD_BUDGET - STD_BUDGET	POCMP - POMQ...	603011 - Life Insurance	0101 - General Aca...	00000 - NO CLASS...	ORIGINAL - ORIGINAL	
STD_BUDGET - STD_BUDGET	POCMP - POMQ...	603003 - Dental Insurance	0101 - General Aca...	00000 - NO CLASS...	ORIGINAL - ORIGINAL	
STD_BUDGET - STD_BUDGET	POCMP - POMQ...	603004 - Health and Wel...	0101 - General Aca...	00000 - NO CLASS...	ORIGINAL - ORIGINAL	
STD_BUDGET - STD_BUDGET	POCMP - POMQ...	603001 - OASDI	0101 - General Aca...	00000 - NO CLASS...	ORIGINAL - ORIGINAL	

Adding a Row

1. Select the Green + sign
2. Enter Data using the Tab Key to move within cells
3. Press Enter to Save



Grid Features : Add



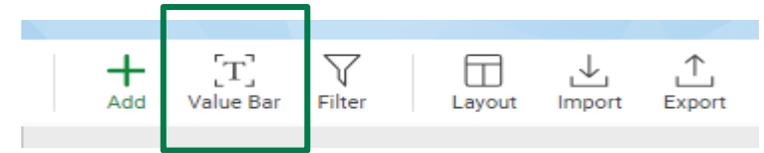
Budget Lines

Monthly | 2022 | 0.00 | Add

GL Account	Description	Strategic Objective	One Time	Projecti
3236 - Fire Safety Plan Review	Fire Safety Plan Reviews (natural reduction in future...			
GL Account Type: Expenses				
4022 - Salaries - Call Out				
4112 - Mileage/Parking	Parking passes			
4116 - Conferences/Travel	Fire Prevention Officers Conference			
4118 - Membership Fees	NFPA Codes Online, IAAI, FPOA, CAFI, BC Chapter I...			



Grid Features : Value Bar



Value Bar

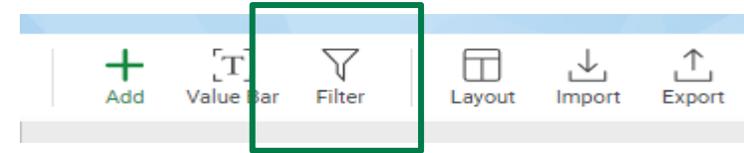
1. Shows the contents of the currently selected cell in a much wider area for improved readability and supports editing of most data types.
2. Used for identifying formulas

The screenshot shows a web application interface for budgeting. The top navigation bar includes 'Dashboard', 'My Tasks', 'Budgeting', 'Reports', and 'Administration'. The main content area displays a table with columns for Name, Acct. Reference, Division, Stage, and Department. The selected cell in the table is highlighted with a yellow background and a value bar is shown above it, displaying the text 'POCMP - AAD19 - 99910'. The value bar is wider than the cell, providing more space for text.

Name	Acct. Reference	Division	Stage	Department
GNA-MISC SERV PUB CY - TBD	POCMP - 90016 - 99910		1-Budget Entry	99910 - University Lev
2019 - 2020 General Fund - University Level Tracking	POCMP - AAD19 - 99910		1-Budget Entry	99910 - University Lev
2020 - 2021 General Fund - University Level Tracking	POCMP - AAD20 - 99910		1-Budget Entrv	99910 - University Lev



Grid Features : Filter



Filter

1. The Filter bar can be toggled on/off by clicking the Filter button on the toolbar
2. When ON a row will appear under each column header. You can then search for specific characters of numbers by using the specific column fields.

csucpp 2023.1.0.18 Dashboard My Tasks **Budgeting** Reports Administration

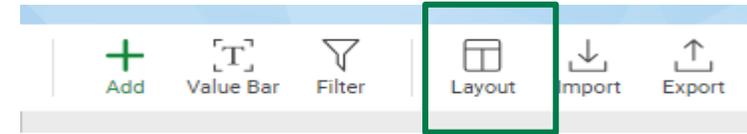
Fund-Depart... | 2023 - 2024 Search Fund-Department

POCMP - AAD19 - 99910

Name	Acct. Reference	Division	Stage	Departm
Type to filter	pom	Type to filter	Type to filter	Type to f
OPERATING FUND - PaCE-CEIS	POCMP - POM01 - 16613		1-Budget Entry	16613 - F
OPERATING FUND - PaCE-College of Business	POCMP - POM01 - 16616		1-Budget Entry	16616 - F
OPERATING FUND - Academic Programs	POCMP - POM01 - 16900	20000 - VP Academic Affairs Offi...	3-Final Approval	16900 - A
OPERATING FUND - Student Success	POCMP - POM01 - 16910	20000 - VP Academic Affairs Offi...	3-Final Approval	16910 - S
OPERATING FUND - Academic Supp & Learning Serv	POCMP - POM01 - 16920	20000 - VP Academic Affairs Offi...	3-Final Approval	16920 - A
OPERATING FUND - PolyTransfer	POCMP - POM01 - 16930	20000 - VP Academic Affairs Offi...	3-Final Approval	16930 - F
OPERATING FUND - College Enqacment & Retention	POCMP - POM01 - 16940		1-Budget Entry	16940 - C



Grid Features : Layout



Layout

1. Allows change to the grid display by adding or removing column fields, grouping and defaulting grid options (value and filters)

The screenshot shows a web application interface for budgeting. The main content area displays a table with the following data:

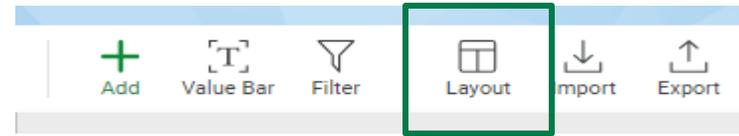
Name	Acct. Reference	Stage
COST RECOVERY-INTERNAL SOURCES - Budget Planning & A...	POCMP - PCR01 - 75000	1-Budget Entry
COST RECOVERY-EXTERNAL SOURCES - Budget Planning & ...	POCMP - PCR02 - 75000	1-Budget Entry
OPERATING FUND - Budget Planning & Analysis	POCMP - POM01 - 75000	3-Final Approval

The sidebar on the right is titled "Grid Layout" and contains the following sections:

- * System Default View (Default)**
- Columns**: A list of columns with checkboxes and arrows for sorting. The columns are: Name *, Acct. Reference, Stage *, Department *, Approved, Fund *, and Display Name.
- Group By**: A section with a plus sign and an arrow, currently showing "No Groupings Applied".
- Grid Options**: A section with checkboxes for "Show Value Bar" and "Show Filter Bar".



Grid Features : Layout



Grid Layout

Add Columns

- Actuals Cache Last Updated On
- Comments
- Department Manager
- Description
- Division
- Export Batch Number
- Fund Manager
- ID
- Lock Status
- Stage Deadline
- Status *

Cancel Add

Name	Acct. Reference	Stage
COST RECOVERY-INTERNAL SOURCES - Budget Planning & A...	POCMP - PCR01 - 75000	1-Budget Entry
COST RECOVERY-EXTERNAL SOURCES - Budget Planning & ...	POCMP - PCR02 - 75000	1-Budget Entry
OPERATING FUND - Budget Planning & Analysis	POCMP - POM01 - 75000	3-Final Approval

Grid Layout

* System Default View (Default)

Columns

- ↓ Name *
- ↑ Acct. Reference
- ↓ Division
- ↓ Stage *
- ↓ Department *
- ↓ Approved
- ↓ Fund *
- ↓ Display Name

Group By

No Groupings Applied

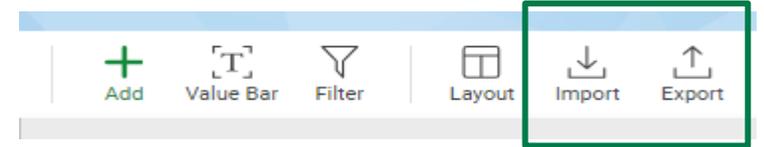
Grid Options

3 records

Name	Acct. Reference	Division
COST RECOVERY-INTERNAL SOURCES - Budget Planning & A...	POCMP - PCR01 - 75000	
COST RECOVERY-EXTERNAL SOURCES - Budget Planning & ...	POCMP - PCR02 - 75000	
OPERATING FUND - Budget Planning & Analysis	POCMP - POM01 - 75000	67400 - VP Adminis



Grid Features : Import/Export



Import/Export

1. Export the contents of grids to an Excel spreadsheet.
2. Edit the data and import it back into Questica to update data efficiently.

The screenshot displays the Questica web application interface. A modal dialog box titled "Batch Process: Spreadsheet Export" is open, showing the following details:

- Status: Complete
- Elapsed: 00:00:01
- Errors: 0
- Errors & Warnings: (Empty box)
- Buttons: Abort, Close

The background interface shows a grid of department data for the 2023-2024 period. The grid includes columns for Department, Name, and other details. A "Downloads" notification in the top right corner indicates that the file "Fund-Department 2024-04-28_13_57_11_PDT.xlsx" (169 KB) has been successfully downloaded.



Search Bar

1. Dependent on the Active Grid/Screen.
2. Advanced Search option **<Query>** available.

The screenshot shows a web application interface for budgeting. At the top, there is a navigation bar with the logo 'csucpp 2023.1.0.18' and menu items: Dashboard, My Tasks, Budgeting (selected), Reports, and Administration. A search bar is located in the top right corner, containing the text 'Search Budget Lines'. Below the navigation bar, there is a header for 'Budget Lines | 2025 - 2026'. A search bar is also present in this header, containing the text 'Search Budget Lines'. To the right of this search bar are several filters: 'Annual' (Grid View), '1 YR' (Display), '2025' (Forecast Year), and '0' (Precision). There are also buttons for '+ Add' and 'Value B'. Below the header, there is a table with the following columns: Ledger Group, Fund-Depart..., Account, Program, Class, and Budget Scenario. The table contains several rows of data, each with a checkbox and a link icon in the first column.

			Ledger Group	Fund-Depart...	Account	Program	Class	Budget Scenario
<input type="checkbox"/>	🔗		STD_BUDGET - STD_BUDGET	POCMP - POM0...	603003 - Dental Insurance	0101 - General Aca...	00000 - NO CLASS...	ORIGINAL - ORIGINAL
<input type="checkbox"/>	🔗		STD_BUDGET - STD_BUDGET	POCMP - POM0...	603004 - Health and Wel...	0101 - General Aca...	00000 - NO CLASS...	ORIGINAL - ORIGINAL
<input type="checkbox"/>	🔗		STD_BUDGET - STD_BUDGET	POCMP - POM0...	603005 - Retirement	0101 - General Aca...	00000 - NO CLASS...	ORIGINAL - ORIGINAL
<input type="checkbox"/>	🔗		STD_BUDGET - STD_BUDGET	POCMP - POM0...	603011 - Life Insurance	0101 - General Aca...	00000 - NO CLASS...	ORIGINAL - ORIGINAL
<input type="checkbox"/>	🔗		STD_BUDGET - STD_BUDGET	POCMP - POM0...	603001 - OASDI	0101 - General Aca...	00000 - NO CLASS...	ORIGINAL - ORIGINAL
<input type="checkbox"/>	🔗		STD_BUDGET - STD_BUDGET	POCMP - POM0...	603012 - Medicare	0101 - General Aca...	00000 - NO CLASS...	ORIGINAL - ORIGINAL
<input type="checkbox"/>	🔗		STD_BUDGET - STD_BUDGET	POCMP - POM0...	603013 - Vision Care	0101 - General Aca...	00000 - NO CLASS...	ORIGINAL - ORIGINAL
<input type="checkbox"/>	🔗		STD_BUDGET - STD_BUDGET	POCMP - POM0...	601100 - Academic Sala...	0101 - General Aca...	00000 - NO CLASS...	ORIGINAL - ORIGINAL



Sort Feature within a Grid

Sort

1. Click on a column header and the grid will sort in ascending order by that column.
2. Click again, and the column will sort in the reverse order.
3. Click a third time to remove the sort.

Position Budget Details

Search Scenario Salary Forecast Budgets

Edit Widget

Save Layout Value Bar Filter Export

Select a cell to view its value.

Budget Year	Fund	Position Number	Class Code	Position Description
Fund: POCMP - TZ001 - HOUSING - OPER AND REVENUE				
2023 - 2024	POCMP - TZ001 - HOUSING - OPER A...	00000034	1038 - 1	Assistant to the Executive Director, University Housing
2023 - 2024	POCMP - TZ001 - HOUSING - OPER A...	00000037	1035 - 1	Admin Support Coord I-12 Mo
2023 - 2024	POCMP - TZ001 - HOUSING - OPER A...	00000039	1038 - 1	Admin Analyst/Spclst NE-12 Mo
2023 - 2024	POCMP - TZ001 - HOUSING - OPER A...	00000040	3318 - 1	Assistant Director For Business Services
2023 - 2024	POCMP - TZ001 - HOUSING - OPER A...	00000041	3312 - 1	Associate Director, University Housing Services
2023 - 2024	POCMP - TZ001 - HOUSING - OPER A...	00000042	6707 - 1	Lead Building Service Engineer
2023 - 2024	POCMP - TZ001 - HOUSING - OPER A...	00000043	6940 - 1	Maintenance Mechanic
2023 - 2024	POCMP - TZ001 - HOUSING - OPER A...	00000044	6940 - 1	Maintenance Mechanic

2000 of 2000 Load All Records



Column Formatting : Group By

Right Click on desired column heading to enable Group By

- Home Fund

Positions | 2023 - 2024

All Positions

<input type="checkbox"/>	Home Fund		Home Department
<input type="checkbox"/>		ic Salaries	50100 - Mathematics and Stati
<input type="checkbox"/>		culty - 1-yr Ent	30200 - Theatre and New Danc
<input type="checkbox"/>		culty - 3-yr Ent	30400 - English & Modern Lang
<input type="checkbox"/>		culty - 3-yr Ent	30700 - Music
<input type="checkbox"/>		601808 - Temp Faculty - 3-yr Ent	
<input type="checkbox"/>	POCMP - PCR01 - COST RECOVERY-INTERNA...	601303 - Student Assistant	75000 - Budget Planning & Ana
<input type="checkbox"/>	POCMP - PCR01 - COST RECOVERY-INTERNA...	601300 - Support Staff Salaries	72675 - Public Safety RE MOU
<input type="checkbox"/>	POCMP - PCR01 - COST RECOVERY-INTERNA...	601809 - Temporary Mgmt and S...	67400 - VP Administrative Affs
<input type="checkbox"/>	POCMP - PCR01 - COST RECOVERY-INTERNA...	601809 - Temporary Mgmt and S...	69740 - Empl Labor Relations &
<input type="checkbox"/>	POCMP - PCR01 - COST RECOVERY-INTERNA...	601816 - Special Stipends	41301 - Business Dean's Instru
<input type="checkbox"/>	POCMP - PCR01 - COST RECOVERY-INTERNA...	601816 - Special Stipends	41500 - Technology & Operator
<input type="checkbox"/>	POCMP - PCR01 - COST RECOVERY-INTERNA...	601816 - Special Stipends	22301 - Agric Dean's Offic Instr
<input type="checkbox"/>	POCMP - PCR01 - COST RECOVERY-INTERNA...	601816 - Special Stipends	22700 - Management/Agric Ed
<input type="checkbox"/>	POCMP - PCR01 - COST RECOVERY-INTERNA...	601816 - Special Stipends	23100 - Human Nutrition & Foo

Home Fund **Group By**
 Freeze
 Unfreeze All Columns
 Resize to Content
 Fit All Columns to Screen
 Resize All Columns to Content

4606 records

csucpp 2023.1.0.18 Dashboard My Tasks **Budgeting**

Positions | 2023 - 2024

All Positions

<input type="checkbox"/>	Home Fund	Account	Home Depart
Home Fund:			
<input type="checkbox"/>		601100 - Academic Salaries	50100 - Math
<input type="checkbox"/>		601807 - Temp Faculty - 1-yr Ent	30200 - Theat
<input type="checkbox"/>		601808 - Temp Faculty - 3-yr Ent	30400 - Engli
<input type="checkbox"/>		601808 - Temp Faculty - 3-yr Ent	30700 - Musi
<input type="checkbox"/>		601808 - Temp Faculty - 3-yr Ent	
Home Fund: POCMP - PCR01 - COST RECOVERY-INTERNAL SOURCES			
<input type="checkbox"/>	POCMP - PCR01 - COST RECOVERY-INTERNA...	601303 - Student Assistant	75000 - Budg
<input type="checkbox"/>	POCMP - PCR01 - COST RECOVERY-INTERNA...	601300 - Support Staff Salaries	72675 - Publi
<input type="checkbox"/>	POCMP - PCR01 - COST RECOVERY-INTERNA...	601809 - Temporary Mgmt and S...	67400 - VP Ar
<input type="checkbox"/>	POCMP - PCR01 - COST RECOVERY-INTERNA...	601809 - Temporary Mgmt and S...	69740 - Empl
<input type="checkbox"/>	POCMP - PCR01 - COST RECOVERY-INTERNA...	601816 - Special Stipends	41301 - Busin
<input type="checkbox"/>	POCMP - PCR01 - COST RECOVERY-INTERNA...	601816 - Special Stipends	41500 - Techn
<input type="checkbox"/>	POCMP - PCR01 - COST RECOVERY-INTERNA...	601816 - Special Stipends	22301 - Agric



Column Formatting : Freeze (Column Scroll)

Right Click on desired column heading to enable Freeze

- Name column

The screenshot shows the 'Positions' page for the 2023-2024 period. A context menu is open over the 'Name' column header, with the 'Freeze' option selected. The table below shows various position types and their details.

	Name	Position Num...	Home Fund
<input type="checkbox"/>	Tenure-Line Faculty	TTF - UNDE	POCMP - POM01 - OPERATING FUND
<input type="checkbox"/>	Tenure-Line Faculty	TTF - GI25	POCMP - POM01 - OPERATING FUND
<input type="checkbox"/>	TF-CLASS-C3508	TF-CLASS-C3508	POCMP - POM01 - OPERATING FUND
<input type="checkbox"/>	TF-CEIS-C3363	TF-CEIS-C3363	POCMP - POM01 - OPERATING FUND
<input type="checkbox"/>	AY Temp Faculty 1yr Ent	TF - TRGTSUP	POCMP - POM01 - OPERATING FUND
<input type="checkbox"/>	Teacher Scholar Program	TF - T/S	POCMP - POM01 - OPERATING FUND
<input type="checkbox"/>	Academic Salaries - Intersession	TF - SMR - RES	POCMP - POM01 - OPERATING FUND
<input type="checkbox"/>	SMR Session Non-Instructional - IRB...	TF - SMR	POCMP - POM01 - OPERATING FUND
<input type="checkbox"/>	Shared Governance Assigned Time - I...	TF - SGR	POCMP - POM01 - OPERATING FUND
<input type="checkbox"/>	Shared Governance Assigned Time - ...	TF - SGFA	POCMP - POM01 - OPERATING FUND
<input type="checkbox"/>	Shared Governance Assigned Time - S...	TF - SGAS	POCMP - POM01 - OPERATING FUND
<input type="checkbox"/>	AY Temp Faculty No Ent	TF - SCI	POCMP - POM01 - OPERATING FUND
<input type="checkbox"/>	Sabbatical Leave Replacement	TF - SAB	POCMP - POM01 - OPERATING FUND
<input type="checkbox"/>	TF - OUR	TF - OUR	POCMP - POM01 - OPERATING FUND

The screenshot shows the 'Positions' page with the 'Name' column frozen. The table below shows the same data as the previous screenshot, but with an additional 'Account' column.

	Name	Position Num...	Home Fund	Account
<input type="checkbox"/>	Tenure-Line Faculty	TF - UNDE	POCMP - POM01 - OPERATING FUND	601100 - A...
<input type="checkbox"/>	Tenure-Line Faculty	TF - GI25	POCMP - POM01 - OPERATING FUND	601100 - A...
<input type="checkbox"/>	TF-CLASS-C3508	TF-CLASS-C3508	POCMP - POM01 - OPERATING FUND	601804 - P...
<input type="checkbox"/>	TF-CEIS-C3363	TF-CEIS-C3363	POCMP - POM01 - OPERATING FUND	601804 - P...
<input type="checkbox"/>	AY Temp Faculty 1yr Ent	TF - TRGTSUP	POCMP - POM01 - OPERATING FUND	601807 - T...
<input type="checkbox"/>	Teacher Scholar Program	TF - T/S	POCMP - POM01 - OPERATING FUND	601804 - P...
<input type="checkbox"/>	Academic Salaries - Intersession	TF - SMR - RES	POCMP - POM01 - OPERATING FUND	601801 - A...
<input type="checkbox"/>	SMR Session Non-Instructional - IRB...	TF - SMR	POCMP - POM01 - OPERATING FUND	601801 - A...
<input type="checkbox"/>	Shared Governance Assigned Time - I...	TF - SGR	POCMP - POM01 - OPERATING FUND	601804 - P...
<input type="checkbox"/>	Shared Governance Assigned Time - ...	TF - SGFA	POCMP - POM01 - OPERATING FUND	601804 - P...
<input type="checkbox"/>	Shared Governance Assigned Time - S...	TF - SGAS	POCMP - POM01 - OPERATING FUND	601804 - P...
<input type="checkbox"/>	AY Temp Faculty No Ent	TF - SCI	POCMP - POM01 - OPERATING FUND	601804 - P...
<input type="checkbox"/>	Sabbatical Leave Replacement	TF - SAB	POCMP - POM01 - OPERATING FUND	601808 - T...
<input type="checkbox"/>	TF - OUR	TF - OUR	POCMP - POM01 - OPERATING FUND	601804 - P...



Column Formatting : Resize to Content

Right Click on desired column heading to enable

Positions | 2023 - 2024 Search Positions

All Positions ▼

<input type="checkbox"/>	<input type="checkbox"/>	Name	D...	P...	Home F...	Acc...	Home ...	P...	Ann...	P...
<input type="checkbox"/>	<input type="checkbox"/>	Instr				60110...	50100 - M...	2.08	10,093,...	
<input type="checkbox"/>	<input type="checkbox"/>	TF - /				60180...	30200 - Th...			
<input type="checkbox"/>	<input type="checkbox"/>	TF - /				60180...	30400 - En...			
<input type="checkbox"/>	<input type="checkbox"/>	TF - /				60180...	30700 - M...			
<input type="checkbox"/>	<input type="checkbox"/>	TF - ABC...	T...			60180...				
<input type="checkbox"/>	<input type="checkbox"/>	Brdg Stu...	*...	0...	POCMP - P...	60130...	75000 - Bu...	1,040		
<input type="checkbox"/>	<input type="checkbox"/>	Police O...	P...	0...	POCMP - P...	60130...	72675 - Pu...	2,080		
<input type="checkbox"/>	<input type="checkbox"/>	Special...	M...	0...	POCMP - P...	60180...	67400 - V...	2,080		
<input type="checkbox"/>	<input type="checkbox"/>	Empl/La...	E...	0...	POCMP - P...	60180...	69740 - E...	2,080		
<input type="checkbox"/>	<input type="checkbox"/>	Special...	*...	0...	POCMP - P...	60181...	41301 - Bu...			T...
<input type="checkbox"/>	<input type="checkbox"/>	Special...	*...	0...	POCMP - P...	60181...	41500 - Te...			
<input type="checkbox"/>	<input type="checkbox"/>	Special...	*...	0...	POCMP - P...	60181...	22301 - A...			
<input type="checkbox"/>	<input type="checkbox"/>	Special...	*...	0...	POCMP - P...	60181...	22700 - M...			
<input type="checkbox"/>	<input type="checkbox"/>	Special...	*...	0...	POCMP - P...	60181...	23100 - H...			

4606 records 5,360... 349,56...

Positions | 2023 - 2024 Search Positions

All Positions ▼

<input type="checkbox"/>	<input type="checkbox"/>	Name	D...	P...	Home F...	Acc...	Home ...	P...	An
<input type="checkbox"/>	<input type="checkbox"/>	Instr Fac-Professor		0...		60110...	50100 - M...	2.08	10,
<input type="checkbox"/>	<input type="checkbox"/>	TF - ABC - T&ND		T...		60180...	30200 - Th...		
<input type="checkbox"/>	<input type="checkbox"/>	TF - ABC - E&ML		T...		60180...	30400 - En...		
<input type="checkbox"/>	<input type="checkbox"/>	TF - ABC - MUSIC		T...		60180...	30700 - M...		
<input type="checkbox"/>	<input type="checkbox"/>	TF - ABC - PHIL		T...		60180...			
<input type="checkbox"/>	<input type="checkbox"/>	Brdg Student Assistant	*...	0...	POCMP - P...	60130...	75000 - Bu...	1,040	
<input type="checkbox"/>	<input type="checkbox"/>	Police Officer	P...	0...	POCMP - P...	60130...	72675 - Pu...	2,080	
<input type="checkbox"/>	<input type="checkbox"/>	Special Consultant - Hourly	M...	0...	POCMP - P...	60180...	67400 - V...	2,080	
<input type="checkbox"/>	<input type="checkbox"/>	Empl/Labor Relations Spclst	E...	0...	POCMP - P...	60180...	69740 - E...	2,080	
<input type="checkbox"/>	<input type="checkbox"/>	Special Consultant	*...	0...	POCMP - P...	60181...	41301 - Bu...		
<input type="checkbox"/>	<input type="checkbox"/>	Special Consultant	*...	0...	POCMP - P...	60181...	41500 - Te...		
<input type="checkbox"/>	<input type="checkbox"/>	Special Consultant	*...	0...	POCMP - P...	60181...	22301 - A...		
<input type="checkbox"/>	<input type="checkbox"/>	Special Consultant	*...	0...	POCMP - P...	60181...	22700 - M...		
<input type="checkbox"/>	<input type="checkbox"/>	Special Consultant	*...	0...	POCMP - P...	60181...	23100 - H...		

4606 records 5,360... 349,56...



Column Formatting : Fit on One Screen

Right Click on desired column heading to enable

Positions | 2023 - 2024 Search Positions

All Positions ▼

<input type="checkbox"/>	<input type="lock"/>	Name	Position Number
<input type="checkbox"/>	<input type="lock"/>	Instr Fac-Profes	00000870
<input type="checkbox"/>	<input type="lock"/>	TF - ABC - T&N	TF - ABC - T&ND
<input type="checkbox"/>	<input type="lock"/>	TF - ABC - E&M	TF - ABC - E&ML
<input type="checkbox"/>	<input type="lock"/>	TF - ABC - MUS	TF - ABC - MUSIC
<input type="checkbox"/>	<input type="lock"/>	TF - ABC - PHIL	TF - ABC - PHIL
<input type="checkbox"/>	<input type="lock"/>	Brdg Student Assistant *Brdg Student Assistant	00002936
<input type="checkbox"/>	<input type="lock"/>	Police Officer Police Officer	00005053
<input type="checkbox"/>	<input type="lock"/>	Special Consultant - Hourly Master Plan Advisor	00005994
<input type="checkbox"/>	<input type="lock"/>	Empl/Labor Relations Spclst Employee/Labor Relations Specialist	00005086
<input type="checkbox"/>	<input type="lock"/>	Special Consultant *Special Consultant	00003269
<input type="checkbox"/>	<input type="lock"/>	Special Consultant *Special Consultant	00003273
<input type="checkbox"/>	<input type="lock"/>	Special Consultant *Special Consultant	00004563
<input type="checkbox"/>	<input type="lock"/>	Special Consultant *Special Consultant	00004865
<input type="checkbox"/>	<input type="lock"/>	Special Consultant *Special Consultant	00004821

4606 records

Positions | 2023 - 2024 Search Positions

All Positions ▼

<input type="checkbox"/>	<input type="lock"/>	Na...	Desc...	P...	Home Fund ↑	Account	Home ...	P...	An...
<input type="checkbox"/>	<input type="lock"/>	Instr...		000...		601100 - A...	50100 - M...	2...	10,0...
<input type="checkbox"/>	<input type="lock"/>	TF - A...		TF -...		601807 - T...	30200 - T...		
<input type="checkbox"/>	<input type="lock"/>	TF - A...		TF -...		601808 - T...	30400 - E...		
<input type="checkbox"/>	<input type="lock"/>	TF - A...		TF -...		601808 - T...	30700 - M...		
<input type="checkbox"/>	<input type="lock"/>	TF - A...		TF -...		601808 - T...			
<input type="checkbox"/>	<input type="lock"/>	Brdg...	*Brdg St...	000...	POCMP - PCR0...	601303 - S...	75000 - B...	1...	
<input type="checkbox"/>	<input type="lock"/>	Polic...	Police O...	000...	POCMP - PCR0...	601300 - S...	72675 - P...	2...	
<input type="checkbox"/>	<input type="lock"/>	Speci...	Master ...	000...	POCMP - PCR0...	601809 - T...	67400 - V...	2...	
<input type="checkbox"/>	<input type="lock"/>	Empl/...	Emple...	000...	POCMP - PCR0...	601809 - T...	69740 - E...	2...	
<input type="checkbox"/>	<input type="lock"/>	Speci...	*Special...	000...	POCMP - PCR0...	601816 - S...	41301 - B...		
<input type="checkbox"/>	<input type="lock"/>	Speci...	*Special...	000...	POCMP - PCR0...	601816 - S...	41500 - T...		
<input type="checkbox"/>	<input type="lock"/>	Speci...	*Special...	000...	POCMP - PCR0...	601816 - S...	22301 - A...		
<input type="checkbox"/>	<input type="lock"/>	Speci...	*Special...	000...	POCMP - PCR0...	601816 - S...	22700 - M...		
<input type="checkbox"/>	<input type="lock"/>	Speci...	*Special...	000...	POCMP - PCR0...	601816 - S...	23100 - H...		

4606 records 5,... 349,...



Fiscal Year Comparison Feature

•Entities
with comparison
feature :

- Account Summary
- Budget Lines
- Position Allocation

Annual ▾ 2 YRS ▾ 2023-2024 ▾ 0 ▾
display Forecast Years Precision

Annual		Class
Trimester		
Quarterly		Type to filter
Monthly		

Annual ▾ 2 YRS ▾ 2023-2024 ▾ 0 ▾
Grid View Forecast Years Precision

1 YR		
2 YRS		Class



FY2025/26 Budget Development Deadlines



FY2025/26 Budget Development Deadlines

- Preliminary Submission: July 10th
 - *Summary of the Budget Validation Ad Hoc View (report)*
- Tentative Final Submission: August 15th
 - *VP Signed PDF of a summary of the Budget Validation Ad Hoc View (report)*
 - *Promotion of the Operating Budget via Questica*
- Please email all of the submissions to the applicable BP&A Analyst that supports your area.



Building Annual Operating Budget in Questica



Building Annual Operating Budget in Questica

- Key Entities

The screenshot displays the Questica software interface with the 'Budgeting' menu expanded. The navigation bar at the top includes 'Dashboard', 'My Tasks', 'Budgeting' (highlighted), 'Reports', and 'Administration', along with a search icon. The main content area is divided into four columns:

- Operating**
 - Budgets and Projections
 - Fund-Department
 - Scenarios
 - Payroll Actuals
 - Projections
- Capital**
 - Capital Projects
 - Capital Project Years
 - Scenarios
 - Capital Project Map
 - Capital Project Milestones
- Personnel**
 - Positions
 - Position Revisions
 - Employees
 - Employee Revisions
 - Classes
 - Scale Values
 - Modifiers
 - Modifier Amounts
 - Earning Breakdowns
 - Earning Breakdown Details
 - Synchronize Personnel
- Performance**
 - Quick Entry
 - Performance Measurement Programs
 - Measures
 - Measure Periods
 - Measure Actuals
 - Scorecards

Below the Performance section, there is a 'Continuity' section with 'Continuity Schedules' and 'Continuity Schedule Forecasts'. At the bottom right, there is an 'OpenBook' icon.

Additional menu items in the 'Budgeting' section include:

- Budget**
 - Account Summary
 - Budget Lines
 - Snapshot Budget Lines
 - Actual Costs
 - Allocations
 - Allocation Source Budget Lines
- Budget**
 - Account Summary
 - Budget Lines
 - Capital Project Actual Costs
 - Operating Impacts
- Stats**
 - Stat Account Summary
 - Project Statistical Forecasts
 - Project Statistical Actuals
- Change Requests**
 - Change Requests
 - Change Request Budget Lines



Building Annual Operating Budget in Questica

- Position Management
 - Home DeptID vs Charge DeptID
 - Home DeptID – where the position lives.
 - Charge DeptID – the department that is charged for the expense.
 - Funding at the Position Level
 - Staff, Faculty (T/TT & Temp), and MPP
 - Unions: R02, R03 (except 2403), R04, R05, R06, R07, R08, R09, M80, & M98
 - Funding Positions via General Ledger (GL) not at the Position Level
 - Union Code: R11 and E99
 - Student/Graduate Assistants: 601103, 601303, 602001, 602002, & 602004
 - Teaching Associates: 601304
 - Overtime: 601301
 - Substitute Faculty: 601805
 - Stipends (2403, etc): 601810, 601814, 601815, 601816, 601819, & 601820
 - Unallocated Compensation (No FTE): 601802



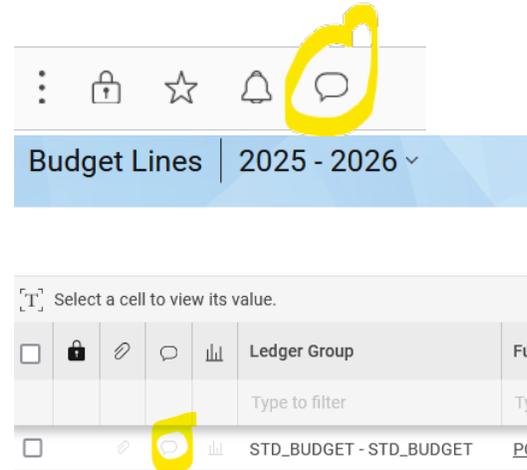
Building Annual Operating Budget in Questica

- Position Management Continued
 - Compare Active Positions (Tableau HR Actuals) to Position Funding Plan
 - PeopleSoft HR (PS-HR) Position Inactivation – After the annual budget load (Oct/Nov)
 - Provide a list of positions to inactivate in PS-HR effective with the 25/26FY to your BP&A PoC
 - Refer to Tableau HR Actuals dashboard to identify active positions.

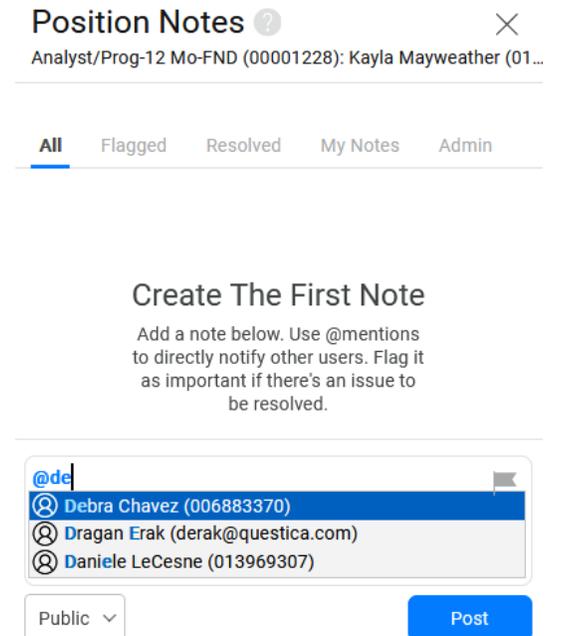


Building Annual Operating Budget in Questica

- Notes
 - In various screens, notes can be sent to users.
 - Select the Note icon
 - Upper left of the screen or in the applicable row



- Type “@” in front of the person’s name to select the recipient of your note.
- Type your note and then select “Post”





Building Annual Operating Budget in Questica

- Positions Entity
 - Establishes the Position's FTE & Annual Budget per FTE
 - Select the applicable Fiscal Year and select Load the Data
 - Select Layout: Annual PSN Budget Build
 - Filter: Budgeted Positions vs Unbudgeted Positions
 - Filter: Do not include
 - Unions: E99 and R11
 - Job Code: 2403
 - Export the Positions into an Excel File
 - Tip! Save two versions
 - One to use as a reference and the other to make your edits.
 - Triple check position budget plans before deleting rows.

Positions | 2025 - 2026

Search Positions

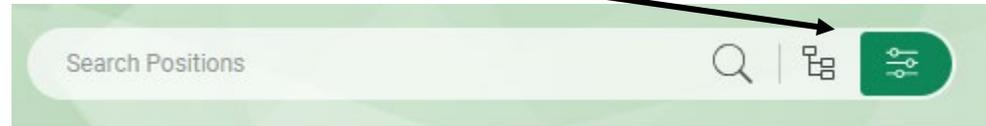
All Positions

<input type="checkbox"/>	<input type="lock"/>	Position Number	Position Security Group	Cost Position Using	FTE Definition	Start Date	Name	Position Status	Position Type	Account	Paid Hours	Annual Budget per FTE
		Type to filter	Type to filter	Type to filter	Type to filter	▼	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter
<input type="checkbox"/>		00000434	UADV	Salary	2.080	Jan 1901	Sr Dir of Dev. Business	Permanent	FULL	601201 - Management and Supervisory	2,080	137,680.00
<input type="checkbox"/>		00000682	UADV	Salary	2.080	Jan 1901	Sr Dir. Develop. Engineering	Permanent	FULL	601201 - Management and Supervisory		
<input type="checkbox"/>		00000693	UADV	Salary	2.080	Jan 1901	Sr Dir. Develop. Env. Design	Permanent	FULL	601201 - Management and Supervisory	2,080	137,277.00
<input type="checkbox"/>		00000760	UADV	Salary	2.080	Jan 1901	Director of Develop. Science	Permanent	FULL	601201 - Management and Supervisory	2,080	121,275.00
<input type="checkbox"/>		00001479	UADV	Salary	2.080	Jul 2024	Dir Gov't & Ext Affairs		FULL	601201 - Management and Supervisory		
<input type="checkbox"/>		00001493	UADV	Salary	2.080	Jan 1901	Director Development CoE	Permanent	FULL	601201 - Management and Supervisory	2,080	115,500.00
<input type="checkbox"/>		00001494	UADV	Salary	2.080	Jan 1901	Pub Affairs/Comm Spec I-12 Mo	Temporary	PART	601302 - Temporary Help	1,040	58,344.00
<input type="checkbox"/>		00001496	UADV	Salary	2.080	Jul 2023	Admin Analyst/Soclat Ell-12Mo	Temporary	FULL	601302 - Temporary Help		
<input type="checkbox"/>		00001502	UADV	Salary	2.080	Jan 1901	Conf/ml Admin Support II-12 Mo	Permanent	FULL	601300 - Support Staff Salaries	2,080	99,036.00

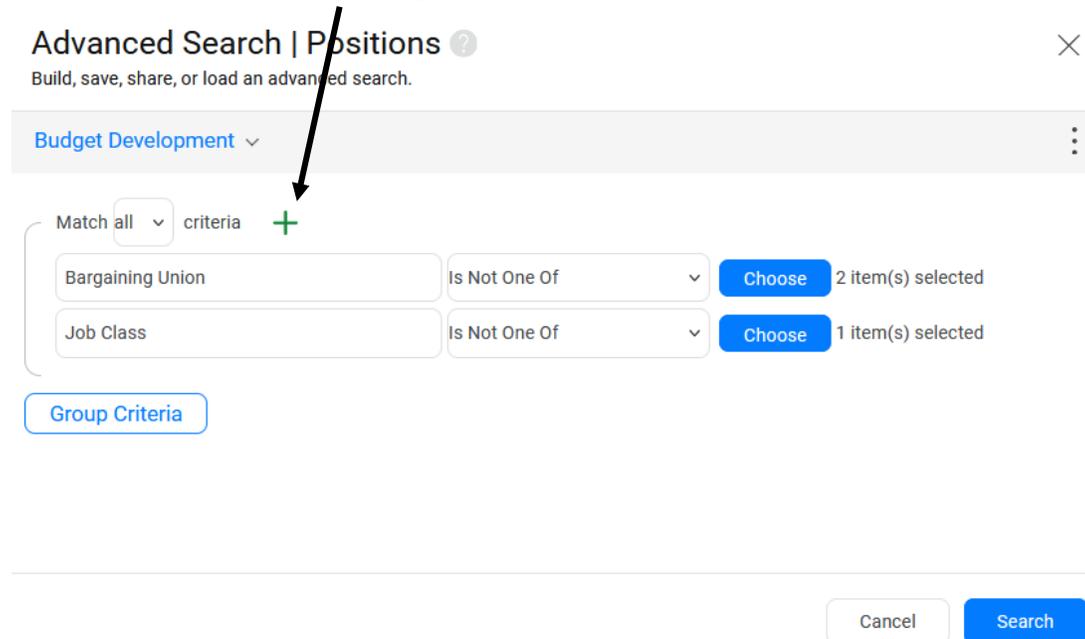


Building Annual Operating Budget in Questica

- Positions Entity Continued
- Creating a Filter
 - **Select**



- **Add criteria by clicking**





Building Annual Operating Budget in Questica

- Positions Entity Continued
 - Unhide Column A
 - Select A2 through L2 to enable filters on the column headers
 - It is critical that column A is visible if filtering the data in the file
 - Column A is the unique key for the position.
 - Update data in columns H – L
 - Position Type, Position Status, Paid Hours, and Annual Budget per FTE
 - Start Date is data from PeopleSoft-HR (new positions should have a July 1st start date)
 - Constant Fields:
 - Cost Position Using = “Salary” FTE Definition = “2,080”
 - Position Security Group = “Applicable Code” (see next slide)

	A	B	C	D	E	F	G	H	I	J	K	L
1												
2		Position Number	Position Security Group *	Cost Position Using *	FTE Definition *	Start Date *	Name *	Position Type *	Position Status	Account *	Paid Hours *	Annual Budget per FTE
5	149152	00000414	UADV	Salary	2,080.00	1901-01-01	Sr Dir of Develop, Collins	FULL	Permanent	601201	2,080.00	139,205.00
6	149117	00000434	UADV	Salary	2,080.00	1901-01-01	Sr Dir of Dev, Business	FULL	Permanent	601201	2,080.00	137,680.00
7	149109	00000682	UADV	Salary	2,080.00	1901-01-01	Sr Dir, Develop, Engineering	FULL	Permanent	601201	-	-
8	149107	00000693	UADV	Salary	2,080.00	1901-01-01	Sr Dir, Develop, Env Design	FULL	Permanent	601201	2,080.00	137,277.00
9	149110	00000760	UADV	Salary	2,080.00	1901-01-01	Director of Develop, Science	FULL	Permanent	601201	2,080.00	121,275.00
10	151827	00001479	UADV	Salary	2,080.00	2024-07-01	Dir Gov't & Ext Affairs	FULL		601201	-	-
11	149171	00001493	UADV	Salary	2,080.00	1901-01-01	Director, Development, CoE	FULL	Permanent	601201	2,080.00	115,500.00
12	147209	00001494	UADV	Salary	2,080.00	1901-01-01	Pub Affairs/Comm Spec I-12 Mo	PART	Temporary	601302	1,040.00	58,344.00
13	151514	00001496	UADV	Salary	2,080.00	2023-07-01	Admin Analyst/Spclst EII-12Mo	FULL	Temporary	601302	-	-
14	147511	00001502	UADV	Salary	2,080.00	1901-01-01	Cnfndtl Admin Support II-12 Mo	FULL	Permanent	601300	2,080.00	99,036.00



Building Annual Operating Budget in Questica

- Positions Entity Continued
 - Position Security Groups
 - Divisions
 - PRES - President's Office
 - ACAD - Academic Affairs
 - ADMN - Administrative Affairs
 - UPD – University Police Department
 - ITIP - Information Technology & Institutional Research
 - STAF - Student Affairs
 - UADV - University Advancement
 - Auxiliary Enterprises
 - CPGE - College of Professional and Global Education
 - HSNG - University Housing
 - PRKG - Parking and Transportation Services



Building Annual Operating Budget in Questica

- Positions Entity Continued
 - Make changes
 - Double-Click in applicable Field(s) for Quick Updates in Questica
 - Export for Mass Updates
 - Complete Data Validation
 - Data>Data Tools>Data Validation>Circle Invalid Data
 - Correct any cells that have a red circle
 - Save and Close the exported Excel File.



	A	B	C	D	E	F	G	H	I	J	K	L
		Position Number	Position Security Group *	Cost Position Using *	FTE Definition *	Start Date *	Name *	Position Type *	Position Status	Account *	Paid Hours *	Annual Budget per FTE
5	149152	00000414	UADV	Salary	2,080.00	1901-01-01	Sr Dir of Develop, Collins	FULL	Permanent	601201	2,080.00	139,205.00
6	149117	00000434	UADV	Salary	2,080.00	1901-01-01	Sr Dir of Dev, Business	FULL	Permanent	601201	2,080.00	137,680.00
7	149109	00000682	UADV	Salary	2,080.00	1901-01-01	Sr Dir, Develop, Engineering	FULL	Permanent	601201	-	-
8	149107	00000693	UADV	Salary	2,080.00	1901-01-01	Sr Dir, Develop, Env Design	FULL	Permanent	601201	2,080.00	137,277.00
9	149110	00000760	UADV	Salary	2,080.00	1901-01-01	Director of Develop, Science	FULL	Permanent	601201	2,080.00	121,275.00
10	151827	00001479	UADV	Salary	2,080.00	2024-07-01	Dir Gov't & Ext Affairs	FULL	Permanent	601201	-	-
11	149171	00001493	UADV	Salary	2,080.00	1901-01-01	Director, Development, CoE	FULL	Permanent	601201	2,080.00	115,500.00
12	147209	00001494	UADV	Salary	2,080.00	1901-01-01	Pub Affairs/Comm Spec I-12 Mo	PART	Temporary	601302	1,040.00	58,344.00
13	151514	00001496	UADV	Salary	2,080.00	2023-07-01	Admin Analyst/Spclst EII-12Mo	FULL	Temporary	601302	-	-
14	147511	00001502	UADV	Salary	2,080.00	1901-01-01	Cnfndtl Admin Support II-12 Mo	FULL	Permanent	601300	2,080.00	99,036.00



Building Annual Operating Budget in Questica

- Positions Entity Continued
 - Import edited Excel file
 - Select Import > Positions > Select File > Click OK
 - Files can only be imported once.
 - Export the data again if additional changes need to be made.

Import Spreadsheet ✕

Import data from a Microsoft Excel spreadsheet.

Importing the selected file will result in the following changes to Positions:

New Items: 0
Updated Items: 2
Deleted Items: 0

Are you sure you want to continue?

Positions | 2025 - 2026 Search Positions 🔍

All Positions 🔍 📄 📊

<input type="checkbox"/>	<input type="lock"/>	Position Number ↑	Position Security Group	Cost Position Using	FTE Definition	Start Date	Name	Position Type	Position Status	Account	Paid Hours	Annual Budget per FTE
		Type to filter	Type to filter	Type to filter	Type to filter	▼	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter
<input type="checkbox"/>		00000414	UADV	Salary	2,080	Jan 1901	Sr Dir of Develop, Collins	FULL	Permanent	601201 - Management and Supervisory	2,080	139,205.00
<input type="checkbox"/>		00000434	UADV	Salary	2,080	Jan 1901	Sr Dir of Dev, Business	FULL	Permanent	601201 - Management and Supervisory	2,080	137,680.00
<input type="checkbox"/>		00000682	UADV	Salary	2,080	Jan 1901	Sr Dir, Develop, Engineering	FULL	Permanent	601201 - Management and Supervisory		
<input type="checkbox"/>		00000693	UADV	Salary	2,080	Jan 1901	Sr Dir, Develop, Env Design	FULL	Permanent	601201 - Management and Supervisory	2,080	137,277.00
<input type="checkbox"/>		00000760	UADV	Salary	2,080	Jan 1901	Director of Develop, Science	FULL	Permanent	601201 - Management and Supervisory	2,080	121,275.00
<input type="checkbox"/>		00001479	UADV	Salary	2,080	Jul 2024	Dir Gov't & Ext Affairs	FULL		601201 - Management and Supervisory		
<input type="checkbox"/>		00001493	UADV	Salary	2,080	Jan 1901	Director, Development, CoE	FULL	Permanent	601201 - Management and Supervisory	2,080	115,500.00
<input type="checkbox"/>		00001494	UADV	Salary	2,080	Jan 1901	Pub Affairs/Comm Spec I-12 Mo	PART	Temporary	601302 - Temporary Help	1,040	58,344.00
<input type="checkbox"/>		00001496	UADV	Salary	2,080	Jul 2023	Admin Analyst/Spclst EII-12Mo	FULL	Temporary	601302 - Temporary Help		
<input type="checkbox"/>		00001502	UADV	Salary	2,080	Jan 1901	Cnfdntl Admin Support II-12 Mo	FULL	Permanent	601300 - Support Staff Salaries	2,080	99,036.00



Building Annual Operating Budget in Questica

- Positions Entity Continued
 - Validate the Data
 - After the file has successfully been imported, reopen the file and total the Paid Hours and Annual Budget per FTE columns.
 - Compare Totals for Paid Hours and Annual Budget per FTE
 - If additional changes need to be made, run a new export, update data, save, & import the file.

Positions | 2025 - 2026 | Search Positions | Unpublish | Publish

All Positions

Position Number	Position Security Group	Cost Position Using	FTE Definition	Start Date	Name	Position Type	Position Status	Account	Paid Hours	Annual Budget per FTE
00000434	UADV	Salary	2,080	Jan 1901	Sr Dir of Dev, Business	FULL	Permanent	601201 - Management and Supervisory	2,080	137,680.00
00000682	UADV	Salary	2,080	Jan 1901	Sr Dir, Develop, Engineering	FULL	Permanent	601201 - Management and Supervisory		
00000693	UADV	Salary	2,080	Jan 1901	Sr Dir, Develop, Env Design	FULL	Permanent	601201 - Management and Supervisory	2,080	137,277.00
00000760	UADV	Salary	2,080	Jan 1901	Director of Develop, Science	FULL	Permanent	601201 - Management and Supervisory	2,080	121,275.00
00001479	UADV	Salary	2,080	Jul 2024	Dir Gov't & Ext Affairs	FULL		601201 - Management and Supervisory		
00001493	UADV	Salary	2,080	Jan 1901	Director, Development, CoE	FULL	Permanent	601201 - Management and Supervisory	2,080	115,500.00
00001494	UADV	Salary	2,080	Jan 1901	Pub Affairs/Comm Spec I-12 Mo	PART	Temporary	601302 - Temporary Help	1,040	58,344.00
00001496	UADV	Salary	2,080	Jul 2023	Admin Analyst/Spcist EI-12 Mo	FULL	Temporary	601302 - Temporary Help		
00001502	UADV	Salary	2,080	Jan 1901	Cnfdntl Admin Support II-12 Mo	FULL	Permanent	601300 - Support Staff Salaries	2,080	99,036.00

79 of 79	164,320									106,120.67637	6,024,180.16
A	B	C	D	E	F	G	H	I	J	K	L
1										106,120.68	6,024,180.16
2	Position Number	Position Security Group *	Cost Position Using *	FTE Definition *	Start Date *	Name *	Position Type *	Position Status	Account *	Paid Hours *	Annual Budget per FTE *
6	149117 00000434	Main	Salary	2,080.00	1901-01-01	Sr Dir of Dev, Business	FULL	Permanent	601201	2,080.00	137,680.00
7	149109 00000682	Main	Salary	2,080.00	1901-01-01	Sr Dir, Develop, Engineering	FULL	Permanent	601201		
8	149107 00000693	Main	Salary	2,080.00	1901-01-01	Sr Dir, Develop, Env Design	FULL	Permanent	601201	2,080.00	137,277.00



Building Annual Operating Budget in Questica

- Position Allocations
 - Establishes the position's funding source
 - Select "Position Allocation Annual Budget Dev" Layout
 - Export and Unhide Column A
 - Select A2 through R2 to enable filters on the column headers
 - It is critical that column A is visible if filtering the data in the file
 - Column A is the unique key for the position.
 - Update the following fields based on the divisional budget plan:
 - Budget Scenario, Fund-Department, Program, Class, Account, and Amount
 - To make mass changes, Export, Update, Save, Close and Import the file.
 - To make quick changes in Questica, double-click on the field, update, and click outside the field.

Position Allocations | 2025 - 2026 ~

Search Position Allocations

Basic

Position Number	Position	Position Allocation T...	Start Date	End Date	Ledger Group	Budget Scenario	Fund-Department	Program	Class	Account	Amount
00000434	Sr Dir of Dev Business (00000434)	Percentage	Jan 2001		STD_BUDGET - STD_BUDGET	ORIGINAL - ORIGINAL	POCMP - POM01 - 74600 - OPERATING FUND - Development	0605 - Public Relations/Development	00000 - NO CLASS VALUE	601201 - Management and Supervisory	100.000
00000682	Sr Dir Develop Engineering (00000682) - Carr...	Percentage	Jan 2001		STD_BUDGET - STD_BUDGET	ORIGINAL - ORIGINAL	POCMP - POM01 - 74600 - OPERATING FUND - Development	0605 - Public Relations/Development	00000 - NO CLASS VALUE	601201 - Management and Supervisory	100.000
00000693	Sr Dir Develop Env Design (00000693) - Jenkin...	Percentage	Jan 1901		STD_BUDGET - STD_BUDGET	ORIGINAL - ORIGINAL	POCMP - POM01 - 74600 - OPERATING FUND - Development	0605 - Public Relations/Development	00000 - NO CLASS VALUE	601201 - Management and Supervisory	100.000

A	B	C	D	E	F	G	H	I	J	K	L	M	
1													
2	Position Number	Position *	Position Allocation Type *	Start Date	End Date	Ledger Group *	Budget Scenario	Fund-Department	Program	Class	Account	Amount	
6	70022	00000434	00000434	Percentage	2001-01-01		STD_BUDGET	ORIGINAL	POCMP - POM01 - 74600	0605	00000	601201 - Management and Supervisory	100.00
7	70020	00000682	00000682	Percentage	2001-01-01		STD_BUDGET	ORIGINAL	POCMP - POM01 - 74600	0605	00000	601201 - Management and Supervisory	100.00
8	70027	00000693	00000693	Percentage	1901-01-01		STD_BUDGET	ORIGINAL	POCMP - POM01 - 74600	0605	00000	601201 - Management and Supervisory	100.00



Building Annual Operating Budget in Questica

- Position Allocations Continued
 - Sync'd Fields via PeopleSoft
 - Position Number, Position, Start Date, and Designations
 - Designation field is populated by Questica based on the Class Code for POM01-Funded PSNs.
 - The following fields will calculate based upon Paid Hours (Position Entity) & Amount (PSN Alloc.)
 - Select “Position Allocation Review – Effective Values” layout to validate.
 - Position FTE, Effective FTE, Effective Hours, & Effective Allocation Percentage
 - Effective FTE: $\text{Position FTE} * \text{Amount} * \text{Duration}$
 - Effective Hours: $\text{Paid Hours} * \text{Amount} * \text{Duration}$

Position Allocations | 2025 - 2026 Search Position Allocations

Basic + Add Value Bar Filter Layout Import Export

<input type="checkbox"/>	<input type="checkbox"/>	Position Number	Position	Ledger Group	Position All.	Start Date	End Date	Budget Scenario	Designation	Fund-Department	Program	Class	Account	Amount	Position FTE	Effective FTE	Effective Hours	Effective Allocation Percentage
		Type to filter	Type to filter	Type to filter	Type to filter	▼	▼	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter
<input type="checkbox"/>	<input type="checkbox"/>	00000434	Sr Dir of Dev Business (00000434)	STD_BUDGET - STD_BUD...	Percentage	Jan 2001		ORIGINAL - ORIGINAL	UNDESIGNATED	POCMP - POM01 - 74600 - OPERATING FUND_	0605 - Pubil...	00000 - ...	601201 - M...	100.000	1	1	2,080	100
<input type="checkbox"/>	<input type="checkbox"/>	00000682	Sr Dir Develop Engineering (00000682) C...	STD_BUDGET - STD_BUD...	Percentage	Jan 2001		ORIGINAL - ORIGINAL	UNDESIGNATED	POCMP - POM01 - 74600 - OPERATING FUND_	0605 - Pubil...	00000 - ...	601201 - M...	100.000	1	1	2,080	100
<input type="checkbox"/>	<input type="checkbox"/>	00000693	Sr Dir Develop Env Design (00000693) Je...	STD_BUDGET - STD_BUD...	Percentage	Jan 1901		ORIGINAL - ORIGINAL	UNDESIGNATED	POCMP - POM01 - 74600 - OPERATING FUND_	0605 - Pubil...	00000 - ...	601201 - M...	100.000	1	1	2,080	100
<input type="checkbox"/>	<input type="checkbox"/>	00000760	Director of Develop Science (00000760)...	STD_BUDGET - STD_BUD...	Percentage	Jan 2001		ORIGINAL - ORIGINAL	UNDESIGNATED	POCMP - POM01 - 74600 - OPERATING FUND_	0605 - Pubil...	00000 - ...	601201 - M...	100.000	1	1	2,080	100
<input type="checkbox"/>	<input type="checkbox"/>	00001493	Director Development CoE (00001493)	STD_BUDGET - STD_BUD...	Percentage	Jan 2001		ORIGINAL - ORIGINAL	UNDESIGNATED	POCMP - POM01 - 74600 - OPERATING FUND_	0605 - Pubil...	00000 - ...	601201 - M...	100.000	1	1	2,080	100
<input type="checkbox"/>	<input type="checkbox"/>	00001494	Pub Affairs/Comm Spec 1:12 Mo (0000149...	STD_BUDGET - STD_BUD...	Percentage	Jan 2001		ORIGINAL - ORIGINAL	UNDESIGNATED	POCMP - POM01 - 73200 - OPERATING FUND_	0605 - Pubil...	00000 - ...	601302 - Te...	100.000	1	1	2,080	100
<input type="checkbox"/>	<input type="checkbox"/>	00001502	Cnfrntl Admin Support II-12 Mo (0000150...	STD_BUDGET - STD_BUD...	Percentage	Jan 2001		ORIGINAL - ORIGINAL	UNDESIGNATED	POCMP - POM01 - 74210 - OPERATING FUND_	0605 - Pubil...	00000 - ...	601300 - S...	91.007	1	0.910073	1,892.95	91.007318
<input type="checkbox"/>	<input type="checkbox"/>	00001502	Cnfrntl Admin Support II-12 Mo (0000150...	STD_BUDGET - STD_BUD...	Percentage	Jan 2001		ORIGINAL - ORIGINAL	FEE	POCMP - POM01 - 74211 - OPERATING FUND_	0501 - Stud...	C4402 - ...	601300 - S...	8.993	1	0.089926	187.05	8.992682
<input type="checkbox"/>	<input type="checkbox"/>	00001507	VP Univ Advancement (00001507) France...	STD_BUDGET - STD_BUD...	Percentage	Jan 2001		ORIGINAL - ORIGINAL	UNDESIGNATED	POCMP - POM01 - 74300 - OPERATING FUND_	0601 - Exec...	00000 - ...	601201 - M...	91.500	1	0.915	1,903.2	91.5
<input type="checkbox"/>	<input type="checkbox"/>	00001507	VP Univ Advancement (00001507) France...	STD_BUDGET - STD_BUD...	Percentage	Jan 2001		ADJUSTMENT - ADJUSTMENT	UNDESIGNATED	POCMP - POM01 - 74300 - OPERATING FUND_	0601 - Exec...	00000 - ...	601201 - M...	8.500	1	0.085	176.8	8.5



Building Annual Operating Budget in Questica

- Position Entity Continued
 - Position Publishing
 - Option #1 - Click the top left box to select all of the positions or individual positions.
 - Right click on the positions (highlighted/selected positions - blue section)
 - Option #2 – Select the “Publish” button located in the top right

Positions | 2025 - 2026

Search Positions

Unpublish Publish

All Positions

<input checked="" type="checkbox"/>	Position Num...	Position Security G...	Cost Position Usi...	FTE Definiti...	Start Date	Name	Position Ty...	Position Status	Account	Paid Ho...	Annual Budget per ...	Published Date
<input checked="" type="checkbox"/>	00000434	UADV	Salary	2,080	Jan 1901	Sc Dir of Dev. Business	FULL	Permanent	601201 - Management and Supervisory	2,080	137,680.00	
<input checked="" type="checkbox"/>	00000682	UADV	Salary	2,080	Jan 1901	Sc Dir. Develop. Engineering	FULL	Permanent	601201 - Management and Supervisory			
<input checked="" type="checkbox"/>	00000693	UADV	Salary	2,080	Jan 1901	Sc Dir. Develop. Env Design	FULL	Permanent	601201 - Management and Supervisory	2,080	137,277.00	
<input checked="" type="checkbox"/>	00000760	UADV	Salary	2,080	Jan 1901	Director of Develop. Science	FULL	Permanent	601201 - Management and Supervisory	2,080	121,275.00	
<input checked="" type="checkbox"/>	00001479	UADV	Salary	2,080	Jul 2024	Dir Gov't & Ext Affairs	FULL		601201 - Management and Supervisory			
<input checked="" type="checkbox"/>	00001493	UADV	Salary	2,080	Jan 1901	Director, Development, CoE	FULL	Permanent	601201 - Management and Supervisory	2,080	115,500.00	
<input checked="" type="checkbox"/>	00001494	UADV	Salary	2,080	Jan 1901	Pub Affairs/Comm Spec I-12 Mo	PART	Temporary	601302 - Temporary Help	1,040	58,344.00	
<input checked="" type="checkbox"/>	00001496	UADV	Salary	2,080	Jul 2023	Admin Analyst/Soclst EII-12Mo	FULL	Temporary	601302 - Temporary Help			
<input checked="" type="checkbox"/>	00001502	UADV	Salary	2,080	Jan 1901	Cnfrntl Admin Support II-12 Mo	FULL	Permanent	601300 - Support Staff Salaries	2,080	99,036.00	

Positions | 2025 - 2026

Search Positions

Unpublish Publish

All Positions

<input checked="" type="checkbox"/>	Position Num...	Position Security G...	Cost Position Usi...	FTE Definiti...	Start Date	Name	Position Ty...	Position Status	Account	Paid Ho...	Annual Budget per ...	Published Date
<input checked="" type="checkbox"/>	00000434	UADV	Salary	2,080	Jan 1901	Sc Dir of Dev. Business	FULL	Permanent	601201 - Management and Supervisory	2,080	137,680.00	
<input checked="" type="checkbox"/>	00000682	UADV	Salary	2,080	Jan 1901	Sc Dir. Develop. Engineering	FULL	Permanent	601201 - Management and Supervisory			
<input checked="" type="checkbox"/>	00000693	UADV	Salary	2,080	Jan 1901	Sc Dir. Develop. Env Design	FULL	Permanent	601201 - Management and Supervisory	2,080	137,277.00	
<input checked="" type="checkbox"/>	00000760	UADV	Salary	2,080	Jan 1901	Director of Develop. Science	FULL	Permanent	601201 - Management and Supervisory	2,080	121,275.00	
<input checked="" type="checkbox"/>	00001479	UADV	Salary	2,080	Jul 2024	Dir Gov't & Ext Affairs	FULL		601201 - Management and Supervisory			
<input checked="" type="checkbox"/>	00001493	UADV	Salary	2,080	Jan 1901	Director, Development, CoE	FULL	Permanent	601201 - Management and Supervisory	2,080	115,500.00	
<input checked="" type="checkbox"/>	00001494	UADV	Salary	2,080	Jan 1901	Pub Affairs/Comm Spec I-12 Mo	PART	Temporary	601302 - Temporary Help	1,040	58,344.00	
<input checked="" type="checkbox"/>	00001496	UADV	Salary	2,080	Jul 2023	Admin Analyst/Soclst EII-12Mo	FULL	Temporary	601302 - Temporary Help			
<input checked="" type="checkbox"/>	00001502	UADV	Salary	2,080	Jan 1901	Cnfrntl Admin Support II-12 Mo	FULL	Permanent	601300 - Support Staff Salaries	2,080	99,036.00	

Publish Position
Unpublish Position
Lock
Copy Row to Clipboard
Clear Notes
Delete



Building Annual Operating Budget in Questica

- Position Entity Continued
 - Position Publishing Continued
 - Click “OK”
 - Click Close once the status is Complete

Publish To Operating ✕

Publish Positions To Operating

You are about to publish the following Salaries data to the Operating budget:

Number of Positions 9 [See Details](#)

Fund-Department Affected 5 [See Details](#)

Are you sure you want to continue?

Cancel OK

Positions | 2025 - 2026 Search Positions

All Positions

+ Add
T Value Bar
F Filter
L Layout
I Import
E Export

<input type="checkbox"/>	Position Num...	Position Security G...	Cost Position Usi...	FTE Definiti...	Start Date	Name	Position Ty...	Position Status	Account	Paid Ho...	Annual Budget per ...	Published Date
	Type to filter	Type to filter	Type to filter	Type to filter	▼	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter
<input type="checkbox"/>	00000434	UADV	Salary	2,080	Jan 1901	Sr Dir of Dev. Business	FULL	Permanent	601201 - Management and Supervisory	2,080	137,680.00	2025-02-24 5:19:19 PM
<input type="checkbox"/>	00000682	UADV	Salary	2,080	Jan 1901	Sr Dir. Develop. Engineering	FULL	Permanent	601201 - Management and Supervisory			2025-02-24 5:19:19 PM
<input type="checkbox"/>	00000693	UADV	Salary	2,080	Jan 1901	Sr Dir. Develop. Env Design	FULL	Permanent	601201 - Management and Supervisory	2,080	137,277.00	2025-02-24 5:19:19 PM
<input type="checkbox"/>	00000760	UADV	Salary	2,080	Jan 1901	Director of Develop. Science	FULL	Permanent	601201 - Management and Supervisory	2,080	121,275.00	2025-02-24 5:19:19 PM
<input type="checkbox"/>	00001479	UADV	Salary	2,080	Jul 2024	Dir Gov't & Ext Affairs	FULL		601201 - Management and Supervisory			2025-02-24 5:19:19 PM
<input type="checkbox"/>	00001493	UADV	Salary	2,080	Jan 1901	Director, Development, CoE	FULL	Permanent	601201 - Management and Supervisory	2,080	115,500.00	2025-02-24 5:19:19 PM
<input type="checkbox"/>	00001494	UADV	Salary	2,080	Jan 1901	Pub Affairs/Comm Spec I-12 Mo	PART	Temporary	601302 - Temporary Help	1,040	58,344.00	2025-02-24 5:19:19 PM
<input type="checkbox"/>	00001496	UADV	Salary	2,080	Jul 2023	Admin Analyst/Spclst EI-12Mo	FULL	Temporary	601302 - Temporary Help			2025-02-24 5:19:19 PM
<input type="checkbox"/>	00001502	UADV	Salary	2,080	Jan 1901	Cnfdntl Admin Support II-12 Mo	FULL	Permanent	601300 - Support Staff Salaries	2,080	99,036.00	2025-02-24 5:19:19 PM



Building Annual Operating Budget in Questica

- Position Entity Continued
 - Position Publishing Continued
 - Once positions have been published, budget lines are established for the budgets tied to the positions.
 - The link image (on the left side under the lock) indicates that the budget is tied to positions.

Budget Lines | 2025 - 2026

Search Budget Lines

Annual | 1 YR | 2025 | 0 | + | Value Bar | Filter | Layout | Import | Export

Select a cell to view its value.

<input type="checkbox"/>					Ledger Group	Fund-Department	Account	Program	Class	Budget Scenario	2025
					Type to filter	74300	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter
<input type="checkbox"/>					STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74300 - OPERATING FUND - VP Univ Advancement Office	601201 - Management and Supervisory	0601 - Executive Management	00000 - NO CLASS VALUE	ORIGINAL - ORIGINAL	467,335
<input type="checkbox"/>					STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74300 - OPERATING FUND - VP Univ Advancement Office	601201 - Management and Supervisory	0601 - Executive Management	00000 - NO CLASS VALUE	ADJUSTMENT - ADJUSTMENT	24,834
<input type="checkbox"/>					STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74300 - OPERATING FUND - VP Univ Advancement Office	601300 - Support Staff Salaries	0601 - Executive Management	00000 - NO CLASS VALUE	ORIGINAL - ORIGINAL	191,838
<input type="checkbox"/>					STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74300 - OPERATING FUND - VP Univ Advancement Office	601809 - Temporary Mgmt and Supervisory	0601 - Executive Management	00000 - NO CLASS VALUE	ADJUSTMENT - ADJUSTMENT	2,892
<input type="checkbox"/>					STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74300 - OPERATING FUND - VP Univ Advancement Office	603001 - OASDI	0601 - Executive Management	00000 - NO CLASS VALUE	ORIGINAL - ORIGINAL	16,499
<input type="checkbox"/>					STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74300 - OPERATING FUND - VP Univ Advancement Office	603001 - OASDI	0601 - Executive Management	00000 - NO CLASS VALUE	ADJUSTMENT - ADJUSTMENT	1,068



Building Annual Operating Budget in Questica

- Position Funding Validation (Published Positions)
 - “Position Budget Details V2 – Tableau Web API” file
 - File is located in the SharePoint “Division” Folder
 - Divisions>2025-26>Annual Budget Dev>PSN Mgmt
 - Data is linked to Questica. DO NOT CHANGE ANYTHING IN THE TABLE
 - Can save a version of the file in your own Division SharePoint folder.
 - Click “Refresh All” to sync the data.

Column1.BudgetYearDisplay	Column1.HomeDivision	Column1.College/AreaDisplay	Column1.HomeDepartment	Column1.ChargeDivision	Column1.Scenario
2024 - 2025	63000 - VP Student Affairs Office	62000 - AVP Health & Wellbeing	64700 - Health Services-Mandatory	63000 - VP Student Affairs Office	ORIGINAL - ORIGINAL
2024 - 2025	67400 - VP Administrative Affs Office	70900 - AVP Facilities Planning & Mgt	71400 - Custodial Services	67400 - VP Administrative Affs Office	ORIGINAL - ORIGINAL
2024 - 2025	20000 - VP Academic Affairs Office	29600 - Dean College Ltrs Arts Soc Sci	31900 - Political Science	20000 - VP Academic Affairs Office	ADJUSTMENT - ADJUSTMENT
2024 - 2025	20000 - VP Academic Affairs Office	22200 - Dean College of Agriculture	22301 - Agric Dean's Office Instruction	20000 - VP Academic Affairs Office	ADJUSTMENT - ADJUSTMENT
2024 - 2025	20000 - VP Academic Affairs Office	16900 - Academic Programs	20001 - VP Academic Affs Instructional	20000 - VP Academic Affairs Office	ADJUSTMENT - ADJUSTMENT
2024 - 2025	20000 - VP Academic Affairs Office	29600 - Dean College Ltrs Arts Soc Sci	55400 - Ethnic & Women's Studies	20000 - VP Academic Affairs Office	ADJUSTMENT - ADJUSTMENT
2025 - 2026	74300 - VP Univ Advancement Office	74600 - Development	74600 - Development	74300 - VP Univ Advancement Office	ORIGINAL - ORIGINAL
2024 - 2025	20000 - VP Academic Affairs Office	29600 - Dean College Ltrs Arts Soc Sci	55400 - Ethnic & Women's Studies	20000 - VP Academic Affairs Office	ADJUSTMENT - ADJUSTMENT
2025 - 2026	20000 - VP Academic Affairs Office	20000 - VP Academic Affairs Office	21700 - Academic Resources	20000 - VP Academic Affairs Office	ORIGINAL - ORIGINAL
2025 - 2026	20000 - VP Academic Affairs Office	22200 - Dean College of Agriculture	23300 - Plant Sciences	20000 - VP Academic Affairs Office	ORIGINAL - ORIGINAL
2025 - 2026	20000 - VP Academic Affairs Office	49700 - Dean College of Science	50000 - Chemistry	20000 - VP Academic Affairs Office	ORIGINAL - ORIGINAL
2025 - 2026	20000 - VP Academic Affairs Office	49700 - Dean College of Science	50000 - Chemistry	20000 - VP Academic Affairs Office	ORIGINAL - ORIGINAL
2025 - 2026	20000 - VP Academic Affairs Office	54200 - Dean College of Education	54400 - Education	20000 - VP Academic Affairs Office	ADJUSTMENT - ADJUSTMENT



Building Annual Operating Budget in Questica

- Position Funding Validation Continued
 - Tab 1 – Totals by Position regardless of Funding or Designation

Column1.PositionNo	Column1.PositionTitle	Column1.EmployeeName	Column1.AccountCode	Column1.FundDisplay	Column1.ChargeDepartment	Column1.PgmCode	Column1.ClassCode	Column1.PaidHours	Column1.CFSDistr	ORIGINAL - ORIGINAL	ADJUSTMENT - ADJUSTMENT	Grand Total		
Pivot Totals												\$ 4,760,411	\$ 913,672	\$ 5,674,084
00000434			601201	POCMP - POM01	74600	0605	00000	2080	100	137,680		137,680		
00000434 Total										137,680		137,680		
00000682			601201	POCMP - POM01	74600	0605	00000	2080	100	144,736		144,736		
00000682 Total										144,736		144,736		
00000693			601201	POCMP - POM01	74600	0605	00000	2080	100	137,277		137,277		
00000693 Total										137,277		137,277		
00000760			601201	POCMP - POM01	74600	0605	00000	2080	100	121,275		121,275		
00000760 Total										121,275		121,275		
00001493			601201	POCMP - POM01	74600	0605	00000	2080	100	115,500		115,500		
00001493 Total										115,500		115,500		
00001494			601300	POCMP - POM01	73200	0605	00000	2080	100	58,344		58,344		
00001494 Total										58,344		58,344		
00001502			601300	POCMP - POM01	74210	0605	00000	2080	91.007318	90,130		90,130		
00001502 Total										8,906		8,906		
										99,036		99,036		

By PSN

By Fund POM01 Base By Designation POM01 ADJ By Designation Position Budget Details v2_Tab1



Building Annual Operating Budget in Questica

- Position Funding Validation Continued
 - Tab 2 – By Fund

Column1.PositionNo	Column1.PositionTitle	Column1.EmployeeName	Column1.AccountCode	Column1.ChargeDepartment	Column1.PgmCode	Column1.ClassCode	Column1.PaidHours	Column1.CFSDistr	ORIGINAL - ORIGINAL	ADJUSTMENT - ADJUSTMENT	Grand Total
00000434			601201	74600	0605	00000	2080	100	137,680		137,680
00000434 Total									137,680		137,680
00000682			601201	74600	0605	00000	2080	100	144,736		144,736
00000682 Total									144,736		144,736
00000693			601201	74600	0605	00000	2080	100	137,277		137,277
00000693 Total									137,277		137,277
00000760			601201	74600	0605	00000	2080	100	121,275		121,275
00000760 Total									121,275		121,275
00001493			601201	74600	0605	00000	2080	100	115,500		115,500
00001493 Total									115,500		115,500
00001494			601300	73200	0605	00000	2080	100	58,344		58,344

By PSN **By Fund** POM01 Base By Designation POM01 ADJ By Designation Position Budget Details v2_Tab1



Building Annual Operating Budget in Questica

- Position Funding Validation Continued
 - Tab 3 – Totals for POM01 Base Funding by Designation

Column1.PositionNo	Column1.PositionTitle	Column1.EmployeeName	Column1.AccountCode	Column1.ChargeDepartment	Column1.PgmCode	Column1.ClassCode	Column1.PaidHours	Column1.CFSDistr	UNDESIGNATED	FEE	Grand Total
00000167			601201	74600	0605	00000	2080	100	135,059		135,059
00000167 Total									135,059		135,059
00000195			601201	74600	0605	00000	2080	100	136,500		136,500
00000195 Total									136,500		136,500
00000414			601201	74600	0605	00000	2080	100	139,205		139,205
00000414 Total									139,205		139,205
00000434			601201	74600	0605	00000	2080	100	137,680		137,680
00000434 Total									137,680		137,680
00000682			601201	74600	0605	00000	2080	100	144,736		144,736
00000682 Total									144,736		144,736

Pivot Totals \$ 4,751,505 \$ 8,906 \$4,760,411

By PSN By Fund **POM01 Base By Designation** POM01 ADJ By Designation Position Budget Details v2_Tab1



Building Annual Operating Budget in Questica

- Position Funding Validation Continued
 - Tab 4 – Totals for POM01 One-Time Funding By Designation

Column1.AccountCode	Column1.ChargeDepartment	Column1.PgmCode	Column1.ClassCode	Column1.PaidHours	Column1.CFSDistr	UNDESIGNATED	Grand Total
00001528					100	53,000	53,000
00001528 Total						53,000	53,000
00004655					-100	-83,004	-83,004
					100	83,004	83,004
					100	83,004	83,004
00004655 Total						83,004	83,004
00004911					100	120,000	120,000
00004911 Total						120,000	120,000
00005099					100	121,275	121,275
00005099 Total						121,275	121,275



Building Annual Operating Budget in Questica

- Budget Lines
 - The Screenshot below only reflects budgets tied to positions.
 - The next step is to add operation budgets

Budget Lines | 2025 - 2026 Search Budget Lines

Grid View Display Forecast Year Precision

[T] Select a cell to view its value.

<input type="checkbox"/>					Ledger Group	Fund-Department	Acc...	Pr...	Cla...	Budget Scenario	2025
					Type to filter	Type to filter	Type to f	Type to	Type to f	Type to filter	Type to filter
<input type="checkbox"/>					STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74800...	60300...	0605 ...	00000 ...	ORIGINAL - ORIGINAL	14,434
<input type="checkbox"/>					STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74800...	60300...	0605 ...	00000 ...	ORIGINAL - ORIGINAL	125,198
<input type="checkbox"/>					STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74800...	60301...	0605 ...	00000 ...	ORIGINAL - ORIGINAL	146
<input type="checkbox"/>					STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74800...	60130...	0605 ...	00000 ...	ORIGINAL - ORIGINAL	232,812
<input type="checkbox"/>					STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74800...	60300...	0605 ...	00000 ...	ORIGINAL - ORIGINAL	9,702
<input type="checkbox"/>					STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74800...	60300...	0605 ...	00000 ...	ORIGINAL - ORIGINAL	189,593
<input type="checkbox"/>					STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74800...	60301...	0605 ...	00000 ...	ORIGINAL - ORIGINAL	6,900



Building Annual Operating Budget in Questica

- Budget Lines
 - Types of Accounts
 - Revenues (5XXXXX account codes)
 - Credits are reflected as a positive number in Questica (negative number in Tableau)
 - Expenses (6XXXXX account codes)
 - Debits are reflected as a positive number in Questica (positive number in Tableau)
 - Add Budget Lines
 - Click “+ Add” to directly add or use the Export/Import option for mass updates

csucpp 2023.1.0.18

Dashboard My Tasks **Budgeting** Reports Administration

Budget Lines | 2025 - 2026

Search Budget Lines

Annual 1 YR 2025 0 + Add Value Bar Filter Layout Import Export

	Ledger Group	Fund-Department	Acc...	Pr...	Cla...	Budget Scenario	2025
	Type to filter	Type to filter	Type to f	Type to	Type to l	Type to filter	Type to filter
<input type="checkbox"/>	STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74800...	60300...	0605 ...	00000 ...	ORIGINAL - ORIGINAL	14,434
<input type="checkbox"/>	STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74800...	60300...	0605 ...	00000 ...	ORIGINAL - ORIGINAL	125,198
<input type="checkbox"/>	STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74800...	60301...	0605 ...	00000 ...	ORIGINAL - ORIGINAL	146
<input type="checkbox"/>	STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74800...	60130...	0605 ...	00000 ...	ORIGINAL - ORIGINAL	232,812
<input type="checkbox"/>	STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74800...	60300...	0605 ...	00000 ...	ORIGINAL - ORIGINAL	9,702



Building Annual Operating Budget in Questica

- Budget Lines

Add Budget Lines

Budget Lines | 2025 - 2026

Annual | 1 YR | 2025 | 0 | + | [T] | [F]

Grid View | Display | Forecast Year | Precision | Add | Value Bar | F

[T] Select a cell to view its value.

	Ledger Group	Fund-Department	Account	Progra...	Class	Budget Scenario	2025
	Type to filter	Type to filter	Type to filter	Type to filte	Type to filter	Type to filter	Type to filter
<input type="checkbox"/>	STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74300 - ...	660003 - ...	0605 - ...	00000 - ...	ADJUSTMENT - ADJUSTM...	10000
<input type="checkbox"/>	STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74800 - OP...	603001 - OA...	0605 - Pu...	00000 - NO...	ORIGINAL - ORIGINAL	14,434
<input type="checkbox"/>	STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74800 - OP...	603005 - Ret...	0605 - Pu...	00000 - NO...	ORIGINAL - ORIGINAL	125,198

Budget Lines | 2025 - 2026

Annual | 1 YR | 2025 | 0 | + | [T] | [F]

Grid View | Display | Forecast Year | Precision | Add | Value Bar | Filter

[T] 10000

	Ledger Group	Fund-Department	Account	Progra...	Class	Budget Scenario	2025
	Type to filter	Type to filter	Type to filter	Type to filte	Type to filter	Type to filter	Type to filter
<input type="checkbox"/>	STD_BUDGET - STD_BUDGET	POCMP - PCR01 - 74400 - COS...	603012 - Me...	0601 - Ex...	00000 - NO...	ADJUSTMENT - ADJUSTMENT	1,454
<input type="checkbox"/>	STD_BUDGET - STD_BUDGET	POCMP - POM01 - 74300 - OP...	660003 - Su...	0605 - Pu...	00000 - NO...	ADJUSTMENT - ADJUSTMENT	10,000

269 of 269 (5,714,612)



Building Annual Operating Budget in Questica

- Budget Lines
 - Adding Supporting Documents
 - Individual Budget Line
 - Click on the paperclip cell

	Ledger Group	Fund-Department	Account	Progra...	Class	Budget Scenario	2025
<input type="checkbox"/>	Type to filter	7500	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter
<input type="checkbox"/>	STD_BUDGET - STD_BUDGET	POCMP - POM01 - 75000 - OPERATING...	601300 - Su...	0602 - Fis...	00000 - NO...	ORIGINAL - ORIGINAL	95,868
<input type="checkbox"/>	STD_BUDGET - STD_BUDGET	POCMP - POM01 - 75000 - OPERATING...	603003 - De...	0602 - Fis...	00000 - NO...	ORIGINAL - ORIGINAL	4,105
<input type="checkbox"/>	STD_BUDGET - STD_BUDGET	POCMP - POM01 - 75000 - OPERATING...	603001 - OA...	0602 - Fis...	00000 - NO...	ORIGINAL - ORIGINAL	26,492
<input type="checkbox"/>	STD_BUDGET - STD_BUDGET	POCMP - POM01 - 75000 - OPERATING...	603004 - He...	0602 - Fis...	00000 - NO...	ORIGINAL - ORIGINAL	24,468

- Select “+Add” and then select your files(s)

Budget Lines Documents

Edit Documents for the Budget Lines "COST RECOVERY-INTERNAL SOUR... > POCMP - PCR01 - 75000 - ..."

Add Document

Add a Document for the Fund-Department "POCMP - PCR01 - 75000 - COST RECOVE..."

Type*
File

File*
Select File No file chosen

Description

Cancel **Add**



Building Annual Operating Budget in Questica

- Budget Lines
 - Adding Supporting Documents Continued
 - Fund-Department Level
 - Go to applicable Fund-Department
 - Select the paperclip image

2025 - 2026 | POCMP - PCR01 - 75000 - COST RECOVERY-INTERNAL SOURCES - Budget Planning & Analysis | Main (Active) | Promote

Dashboard | General | Budget | Positions | Stats | Advanced | Reports

Budget Lines

Annual | 1 YR | 2025 | 0 | + | Value Bar | Filter | Layout | Import | Export

Select a cell to view its value.

Account	Document Line D...	Class	Program	Budget Scen...	Change Request	Sub-De...	Desi...	Export Bat...	Document Line Nu...	Post...	Ledger Oro...	Lock...	Fund	Gen...	Acco...	2025
Account Type: Expenses																
603005 - Retirement		00000 - NO C...	0602 - Fiscal Op...	ADJUSTMENT...		UNDESIGN...	UNDES...			mm / m	STD_BUDGET...	Unlocked	POCMP - PCR01 - COS...	✓	Expenses	54,045
603012 - Medicare		00000 - NO C...	0602 - Fiscal Op...	ADJUSTMENT...		UNDESIGN...	UNDES...				STD_BUDGET...	Unlocked	POCMP - PCR01 - COS...	✓	Expenses	3,616
603001 - OASDI		00000 - NO C...	0602 - Fiscal Op...	ADJUSTMENT...		UNDESIGN...	UNDES...				STD_BUDGET...	Unlocked	POCMP - PCR01 - COS...	✓	Expenses	12,736
601302 - Temporary H...		00000 - NO C...	0602 - Fiscal Op...	ADJUSTMENT...		UNDESIGN...	UNDES...				STD_BUDGET...	Unlocked	POCMP - PCR01 - COS...	✓	Expenses	43,965
															9	(367,752)

- Select “+ Add” and then select “Select File”

Fund-Department Documents ?
Edit Documents for the Fund-Department "POCMP - PCR01 - 75000 - COST RECOVERY-INTERNAL SOU..."

+ Add | Value Bar | Filter | Layout

Add Document
Add a Document for the Fund-Department "POCMP - PCR01 - 75000 - COST RECOVE..."

Type*
File

File
Select File | No file chosen

Description

Cancel | Add

Description | Resource



Building Annual Operating Budget in Questica

- Validate Budget Load – Create Web API File
 - Ad-Hoc Report: “CLL – Budget Load Validation”
 - Budget Services SharePoint>Divisions>2025-26>Annual Budget Dev> Budget Validation

Row Labels	ORIGINAL - ORIGINAL	ADJUSTMENT - ADJUSTMENT	Grand Total
73200	544,471	190,132	734,603
74210	328,262	125,717	453,979
74211		0	0
74300	669,327	692,890	1,362,217
74310	90,000	75,304	165,304
74400	280,330	133,228	413,558
74500	410,392	170,333	580,725
74600	1,676,785	543,083	2,219,868
74610	0	0	0
74800	348,488	474,153	822,641
74900	413,605	388,144	801,749
Grand Total	4,761,660	2,792,984	7,554,644



Building Annual Operating Budget in Questica

- Validate Budget Load – Create Web API File
 - Ad-Hoc Report: “CLL – Budget Load Validation”
 - Steps
 - Go to Questica > Reports > Ad hoc Views (Report)
 - Search for the Ad hoc report that you would like to connect to Excel
 - Right Click on the name of the Ad hoc report
 - Select “Connect to Excel”
 - The info you need to make the connection in Excel will be displayed in a pop-up window.

Connect to Excel ? ×

Use this Ad hoc View as "From Web" Data source in Excel.

To create the connection, open Microsoft Excel and click Data > From Web, switch to the Advanced view, and enter in all of the information seen below.

URL Parts

□

HTTP request header parameters

□ □

[Close](#)



Building Annual Operating Budget in Questica

- Validate Budget Load – Create Web API File Continued
 - Go to Excel>Data>”Get & Transform Data”>”From Web”
 - Enter the information from the “Connect to Excel” window into the Excel “From Web” window, then click “OK.”

From Web

Basic Advanced

URL parts ⓘ

...

URL preview

Command timeout (or, for web pages, wait time) in minutes (optional)

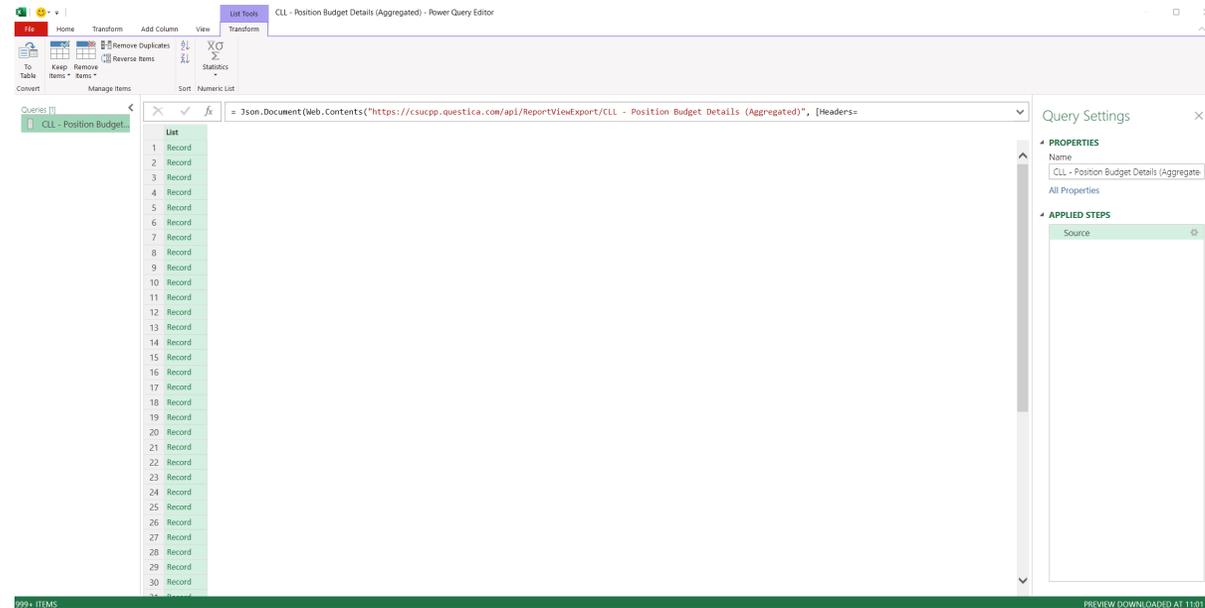
HTTP request header parameters (optional) ⓘ





Building Annual Operating Budget in Questica

- Validate Budget Load – Create Web API File Continued
 - A PowerQuery will pop up.



- Then click the upper left “To Table” button.





Building Annual Operating Budget in Questica

- Validate Budget Load – Create Web API File Continued
 - Accept the table by clicking OK.

To Table

Create a table from a list of values.

Select or enter delimiter
None

How to handle extra columns
Show as errors

OK Cancel

- Then click the expand button to load up all the columns then click “OK”.

Queries [1]

CLL - Position Budget...

ABC Column1

	ABC	Column1
1		Record
2		Record

= Table.FromList(

Position Budget Data...

ABC Column1

- (Select All Columns)
- BudgetYearDisplayName
- HomeDivision
- College/AreaDisplayName
- HomeDepartment
- ChargeDivision
- Scenario
- ChargeDepartment
- Fund-DepartmentDisplayName
- FundDisplayName
- PgmCode
- ClassCode
- ClassDesignation
- ClassSub-Designation
- AccountCode
- AccountSummary
- AccountCategory

Use original column name as prefix

⚠ List may be incomplete. Load more

OK Cancel



Building Annual Operating Budget in Questica

- Validate Budget Load – Create Web API File Continued
 - The data should populate the screen.

Table: ExpandRecordColumn(*Converted to Table*, "Column1", ("BudgetYear", "Fund", "Fund-Department", "HomeDepartment", "HomeDivision", "College/Area",

Column1.BudgetYear	Column1.Fund	Column1.Fund-Department	Column1.HomeDepartment	Column1.HomeDivision
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 22700 - COST RECOVERY-INTERNAL SOURCES - Mana...	22700 - Management/Agric Ed	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 22900 - COST RECOVERY-INTERNAL SOURCES - Appa...	22900 - Apparel Merchandising & Mgm't	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 23000 - COST RECOVERY-INTERNAL SOURCES - Anim...	23000 - Animal Sciences	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 23100 - COST RECOVERY-INTERNAL SOURCES - Hum...	23100 - Human Nutrition & Food Science	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 23300 - COST RECOVERY-INTERNAL SOURCES - Plant...	23300 - Plant Sciences	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 29100 - COST RECOVERY-INTERNAL SOURCES - Psych...	29100 - Psychology	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 29200 - COST RECOVERY-INTERNAL SOURCES - Sociol...	29200 - Sociology	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 30000 - COST RECOVERY-INTERNAL SOURCES - Comm...	30000 - Communication	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 30200 - COST RECOVERY-INTERNAL SOURCES - Theat...	30200 - Theatre and New Dance	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 30300 - COST RECOVERY-INTERNAL SOURCES - Econ...	30300 - Economics	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 30400 - COST RECOVERY-INTERNAL SOURCES - Englis...	30400 - English & Modern Languages	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 30600 - COST RECOVERY-INTERNAL SOURCES - History	30600 - History	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 30700 - COST RECOVERY-INTERNAL SOURCES - Music	30700 - Music	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 31000 - COST RECOVERY-INTERNAL SOURCES - Geog...	31000 - Geography & Anthropology	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 31600 - COST RECOVERY-INTERNAL SOURCES - Philo...	31600 - Philosophy	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 31900 - COST RECOVERY-INTERNAL SOURCES - Politi...	31900 - Political Science	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 34742 - COST RECOVERY-INTERNAL SOURCES - Admi...	34731 - Admin Services	34000 - ITIP VP/CIO
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 34742 - COST RECOVERY-INTERNAL SOURCES - Admi...	34731 - Admin Services	34000 - ITIP VP/CIO
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 34742 - COST RECOVERY-INTERNAL SOURCES - Admi...	34742 - Administrative Apps	34000 - ITIP VP/CIO
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 34742 - COST RECOVERY-INTERNAL SOURCES - Admi...	34742 - Administrative Apps	34000 - ITIP VP/CIO
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 34742 - COST RECOVERY-INTERNAL SOURCES - Admi...	34742 - Administrative Apps	34000 - ITIP VP/CIO
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 34742 - COST RECOVERY-INTERNAL SOURCES - Admi...	34742 - Administrative Apps	34000 - ITIP VP/CIO
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 36000 - COST RECOVERY-INTERNAL SOURCES - CCH...	36000 - CCHM Dean's Instructional Supp	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 41400 - COST RECOVERY-INTERNAL SOURCES - Acco...	41400 - Accounting	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 41500 - COST RECOVERY-INTERNAL SOURCES - Tech...	41500 - Technology & Operations Mgmt	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 41600 - COST RECOVERY-INTERNAL SOURCES - Mana...	41600 - Management & Human Resources	20000 - VP Academic Affairs Office
2023 - 2024	POCMP - PCR01 - COST RECOVERY-INTERNAL SOUR...	POCMP - PCR01 - 41700 - COST RECOVERY-INTERNAL SOURCES - Comp...	41700 - Computer Information Systems	20000 - VP Academic Affairs Office

Query Settings

PROPERTIES

Name

CLL - Position Budget Details (Aggregat

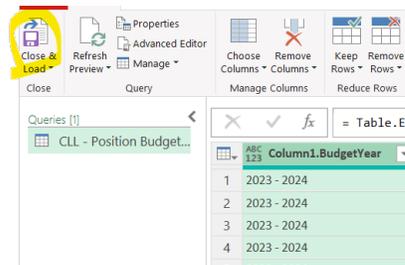
APPLIED STEPS

Source

Converted to Table

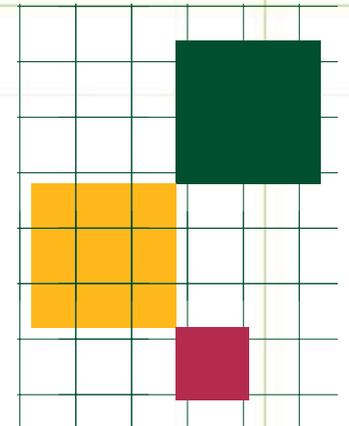
Expanded Column1

- Then choose “Close & Load” (top option)..





Submitting Operating Budget in Questica





Submitting Operating Budget in Questica

- Sample eMail Notifications

Ex: Questica Notifications



Hi Anne-Marie,
Here's some activity you may have missed in Questica Budget:



Submitting Operating Budget in Questica Cont.

- Position Budgets Hands-On Activity

Create a Notification for Budget Promotion/Demotion

The screenshot shows the user profile for Anne-Marie Larrabure (000038402). The profile includes a user card with a profile picture (AL), full name, and email address. Below the profile card, there are sections for Licenses and Notifications. The Licenses section shows four categories: Operating, Capital, Personnel, and Performance, each with a 'Full Access' dropdown menu. The Notifications section is a table with columns for Mute, In-app, and In-app + Email. The 'My Subscriptions' notification is highlighted in yellow.

Notifications	Mute	In-app	In-app + Email
Calendar Events	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
My Tasks	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
My Subscriptions	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Chat Mentions	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Overdue Measures	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>



Submitting Operating Budget in Questica Cont.

- Position Budgets Hands-On Activity

Create a Notification for Budget Promotion/Demotion Continued

Manage Subscriptions ? ×

Manage the events that will send you a notification or email.

My Alerts ▼ + Add ⌂ Value Bar ⌵ Filter ⌘ Layout

<input type="checkbox"/>	Created	Creator	Description	Enabled	Filters
--------------------------	---------	---------	-------------	---------	---------

Create an Alert ? ×

Create an email notification when a specific event occurs.

Title *
Budget Promotion

Events	Filters
Entity Fund-Department ▼	Fund <input type="text"/>
Type of Event Fund-Department Promoted/Demoted ▼	Department <input type="text"/>
By User Arah Parker (007687082) ▼	Stage <input type="text"/>
	Fund-Department ... <input type="text"/>
	Scenario <input type="text"/>

Cancel OK



Submitting Operating Budget in Questica Cont.

- Promoting Validated Budget to the Next Level
 - Go to Fund-Department
 - Click on the boxes of the Fund-Department(s) that you would like to promote (or demote)

Fund-Department | 2025 - 2026 ▾

Search Fund-Department

+ Add T Value Bar Filter Layout Import Export

<input type="checkbox"/>	<input type="checkbox"/>	Fund	Department	Name	Acct. Reference	Stage	Status	Approved	Lock...	Comments
		Type to filter	74300	Type to filter	Type to filter	Type to filter	Type to filter	<input checked="" type="checkbox"/>	Type to fil	Type to filter
<input type="checkbox"/>		POCMP - TX139 - Microwave Exchange	74300 - VP Univ Advancement Office	Microwave Exchange - VP Univ Advancement Office	POCMP - TX139 - 74300	1-Budget Entry	Active	✓	Unlocked	
<input type="checkbox"/>		POCMP - PCR01 - COST RECOVERY-IN...	74300 - VP Univ Advancement Office	COST RECOVERY-INTERNAL SOURCES - VP Univ Advancement...	POCMP - PCR01 - 74300	1-Budget Entry	Active	✓	Unlocked	
<input type="checkbox"/>		POCMP - PCR02 - COST RECOVERY-EX...	74300 - VP Univ Advancement Office	COST RECOVERY-EXTERNAL SOURCES - VP Univ Advancement...	POCMP - PCR02 - 74300	1-Budget Entry	Active	✓	Unlocked	
<input type="checkbox"/>		POCMP - POM01 - OPERATING FUND	74300 - VP Univ Advancement Office	OPERATING FUND - VP Univ Advancement Office	POCMP - POM01 - 74300	1-Budget Entry	Active	✓	Unlocked	

- Right click and select Promote/Demote
- Make any notations in the comment box and then click okay



Submitting Operating Budget in Questica Cont.

- Promotion/Demotion of Budget Continued
 - Budget Promotion Options
 - Budget Preparer selects Management Review (Stage 2) for the Division Budget Officer to Approve.
 - Division Budget Officer to select Final Approval (Stage 3) if budget is approved for BP&A Approval.

Workflow Stages



Select a stage to promote to

1-Budget Entry (current stage)

2-Management Review

3-Final Approval



Submitting Operating Budget in Questica Cont.

- Promotion/Demotion of Budget Continued
 - When promoting to BP&A (Stage 3), please note that the VP has approved the budget and that a PDF of the signed budget has been emailed to BP&A.
 - eMail VP approved PDF of the budget to the applicable .
 - Click Save
- Deadlines
 - Preliminary Submission: July 10th
 - Summary of the Budget Validation Ad Hoc View (report)
 - *Tentative* Final Submission: August 15th
 - *VP Signed PDF of a summary of the Budget Validation Ad Hoc View (report)*
 - *Promotion of the Operating Budget via Questica*
 - Please email all of the submissions to the applicable BP&A Analyst that supports your area.

Notes ? ×
Flagged notes and notes that were added in the current stage

POCMP - POM01 - 73200 - OPERATING FUND - Alumni

SU Promoted from Base Budget (System) to 1-Budget Entry
Service User Apr-22
Base Budget Promotion Snapshot

Enter promote comment here

Cancel < Previous Save



Submitting Operating Budget in Questica Cont.

- Promotion/Demotion of Budget Continued
 - Management Review: Promote or Demote
 - Promote – Follow previous steps
 - Demote – Follow upcoming steps

2-MANAGEMENT REVIEW

2024 - 2025 | POCMP - POM01 - 73200 - OPERATING FUND - Alumni | Main (Active) | Demote Promote

Dashboard General Budget Positions Stats Advanced Reports

Budget Lines

Annual 2 YRS 2024-2025 0 + Value Bar Filter Layout Import Export

Select a cell to view its value.

Fund	Account	Program	Class	Budget Scenario	Document Line Description	Forecast Type	2024
Account Type: Expenses							(50,000)
POCMP - POM01 - OPERATING F...	660003 - Supplies and Services	0601 - Executive Management	C4402 - COMMENCEMENT	ORIGINAL - ORIGINAL	PERM BUDGET - FEES	Operating	50,000



Submitting Operating Budget in Questica Cont.

- Promotion/Demotion of Budget Continued
 - Demotion of Budget
 - Select “1-Budget Entry” to return the budget back to the preparer.
 - Add comments for the preparer in the Notes
 - Click Save

Workflow Stages ?

Select a stage to demote to

1-Budget Entry

2-Management Review (current stage)

3-Final Approval



Notes ?

Flagged notes and notes that were added in the current stage

POCMP - POM01 - 73200 - OPERATING FUND - Alumni

SU

Promoted from Base Budget (System) to 1-Budget Entry

Service User Apr-22

Base Budget Promotion Snapshot

Enter promote comment here

Cancel

< Previous

Save



Submitting Operating Budget in Questica Cont.

- Once PB&A approves the Fund-Department Budget, the option to promote is no longer available.

3-FINAL APPROVAL

2024 - 2025 | POCMP - POM01 - 73200 - OPERATING FUND - Alumni | Main (Active) Demote

Dashboard | General | **Budget** | Positions | Stats | Advanced | Reports

Budget Lines

Annual | 2 YRS | 2024-2025 | 0 | + | Value Bar | Filter | Layout | Import | Export

POCMP - POM01 - OPERATING FUND

Fund	Account	Program	Class	Budget Scenario	Document Line Description	Forecast Type	2024
Account Type: Expenses							(50,000)
POCMP - POM01 - OPERATING F...	660003 - Supplies and Services	0601 - Executive Management	C4402 - COMMENCEMENT	ORIGINAL - ORIGINAL	PERM BUDGET - FEES	Operating	50,000



Questions?

