osition Budget Adjustment Form

Cal Poly Pomona

Agenda

I. Position Management Terms

II. Position Components

III. PBA Prep & Position Principles

IV. Tableau Position Budget & Custom View Reports

V. PBA Form Overview & Input

   I. Wage Adjustment & Operating

   II. Position Allocation

      I. How to Use the Calculator

VI. Demo

Position Management Terms

Annual Budget by CFS : Total Position Budget $$

CFS Distr : Position Allocation % by Scenario & CFS

- Single Funded – 100% CFS Distr
- Split Funded –100% CFS Distr with different Budget Scenarios

Budget Scenario : Position's Funding Type

- Original
- Adjustment

Original

BASE Funding
PERM Funding
Permanent Funding

Budget Scenario	Designation	Sub-Designation	Account Code	Fund Code	CFS Dept ID	Pgm	Class	CFS Distr
ORIGINAL	UNDESIGNA..	UNDESIGNA..	601300	POM01	67700 - Ac..	0602	00000	100.00000

Adjustment

One Time Funding
TEMP Funding
Temporary Funding

Budget Scenario	Designation	Sub-Designation	Account Code	Fund Code	CFS Dept ID	Pgm	Class	CFS Distr
ADJUSTMENT	UNDESIGNA..	UNDESIGNA..	601201	POM01	73730 - Co..	0605	00000	100.00000

Split

Combination of Original &/Or Adjustment Funding

Budget Scenario	Designation	Sub-Designation	Account Code	Fund Code	CFS Dept ID	Pgm	Class	CFS Distr
ORIGINAL	UNDESIGNA..	UNDESIGNA..	601300	POM01	72100 - Pr..	0708	00000	25.00000
ADJUSTMENT	UNDESIGNA..	UNDESIGNA..	601300	PCR01	72100 - Pr..	0708	00000	75.00000

Position Components

Annual Budget (WAGE)

- Dollars

CFS Distribution (Position Allocation)

- % Allocation & CFS Charged

Budget Scenario (Position Allocation)

- Original
- Adjustment

Designation

- Undesignated
- Designated
- Fee

****

Position Data in Tableau

Questica Position Budget Report

***If the position is not on the report, it is not funded

PBA Prep & Position Principles

PREP for PBA Input

Position Principles

Total Position Budget & Position Allocation % by CFS are required to fund a position

- Wage Adjustment changes position's budget ($$)
- Position Allocation defines how a position should be funded (% &/or CFS)

Review of Budget Scenario Field in Tableau Reports

- A separate line needs to be entered for each position's Budget Scenario
- If more than one Budget Scenario per position, the Total Budget amount is entered for each Budget Scenario line & must be identical $$ amounts

III. PBA Prep & Position Principles

Each position needs a separate line for each of it's Budget Scenarios

1-Tableau Position Report

Budget Scenario	Designation	Sub-Designation	Account Code	Fund Code	CFS Dept ID	Pgm	Class		CFS Distr	Annual Budget by CFS
ORIGINAL	UNDESIGNA..								100.00000	94,680.00

1 A -PBA Form

B	C	D	E	K	L	M
Position Number	Current Total Pos Budget $	New Total Pos Budget $	Total Pos Budget Change $	Budget Scenario	Designation	Current Pos Allocation %
000000ZZ	94,680.00	-	(94,680.00)	ORIGINAL	UNDESIGNATED	100.00000%

If ***split funded***, the Total Budget amount needs to be input in Column C (PBA Form)

2-Tableau Position Report

Budget Scenario	Designation	Sub-Designation	Account Code	Fund Code	CFS Dept ID	Pgm	Class		CFS Distr	Annual Budget by CFS
ADJUSTMENT	UNDESIGNA..								50.00000	25,842.00
ORIGINAL	UNDESIGNA..								50.00000	25,842.00

2 A -PBA Form

B	C	D	E	K	L	M
Position Number	Current Total Pos Budget $	New Total Pos Budget $	Total Pos Budget Change $	Budget Scenario	Designation	Current Pos Allocation %
000000XX	51,684.00	-	(51,684.00)	ORIGINAL	UNDESIGNATED	50.00000%
000000XX	51,684.00	-	(51,684.00)	ADJUSTMENT	UNDESIGNATED	50.00000%

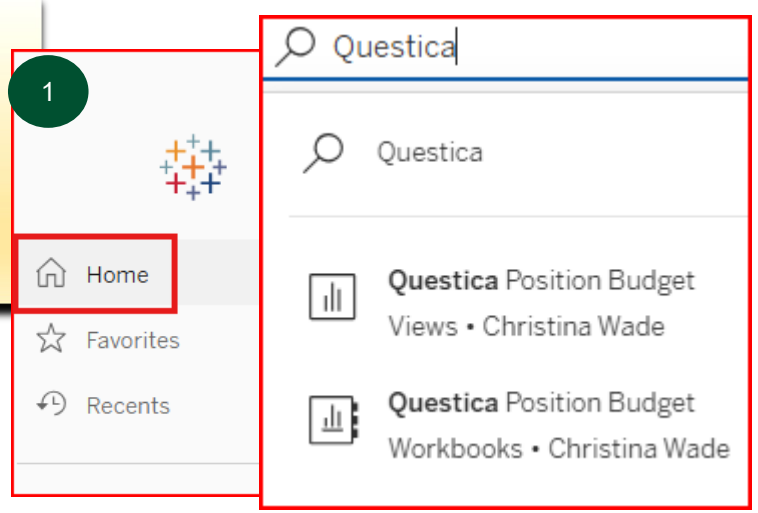
Cal Poly Pomona

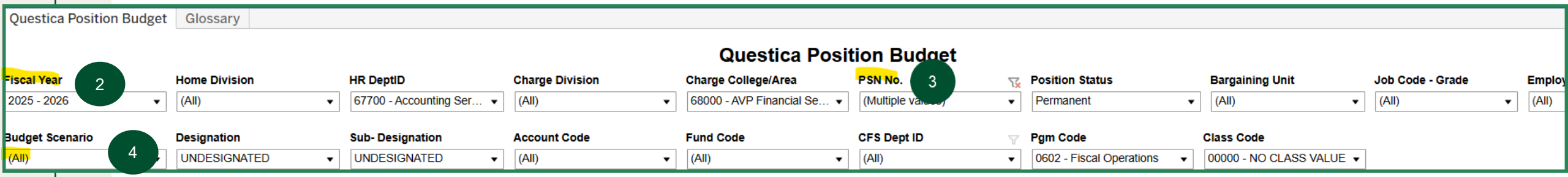
TABLEAU REPORTS
Reference

IV. Tableau Questica Position Budget

STEPS to Filter for Position PBA Data

1. Log into Tableau Questica Position Budget View
2. Check Fiscal Year (Current)
3. Filter for Position(s)
4. Ensure Budget Scenario is set to ALL





IV. Tableau Questica Position Budget

Filter for Position Data

Summary Section: Top Portion of Screen
Provides high-level totals for FTE & Annual Budgets by DeptID & Budget Scenario

Detail Section: Bottom Portion of Screen
Provides Information for a position's budget
All column headers outlined in Green will be entered into the PBA form

Data Sources

Questica Position Budget

harge College/Area: 8000 - AVP Financial S...
PSN No.: (All) — 402 — 00001402, 00004020, 00004022, 00004023 — Cancel, Apply
Position Status: Permanent
Bargaining Unit: (All)
Job Code - Grade: (All)
Employee / Bronco ID: (All)
nd Code: All)
Pgm Code: 0602 - Fiscal Operations
Class Code: 00000 - NO CLASS VALUE

Summary

Updated: 12/8/2025 7:00:33 AM
click to filter

Charge Division	Charge College/Area	CFS Dept ID	Budget Scenario	Effective FTE	CFS Distr	Annual Budget by CFS
67400 - VP Administrative Affs Office	68000 - AVP Financial Services	67700 - Accounting Services	ORIGINAL	2.00	200.00000	169,668.00
			Total	2.00	200.00000	169,668.00
		Total		2.00	200.00000	169,668.00
	Total			2.00	200.00000	169,668.00
Grand Total				2.00	200.00000	169,668.00

Detail

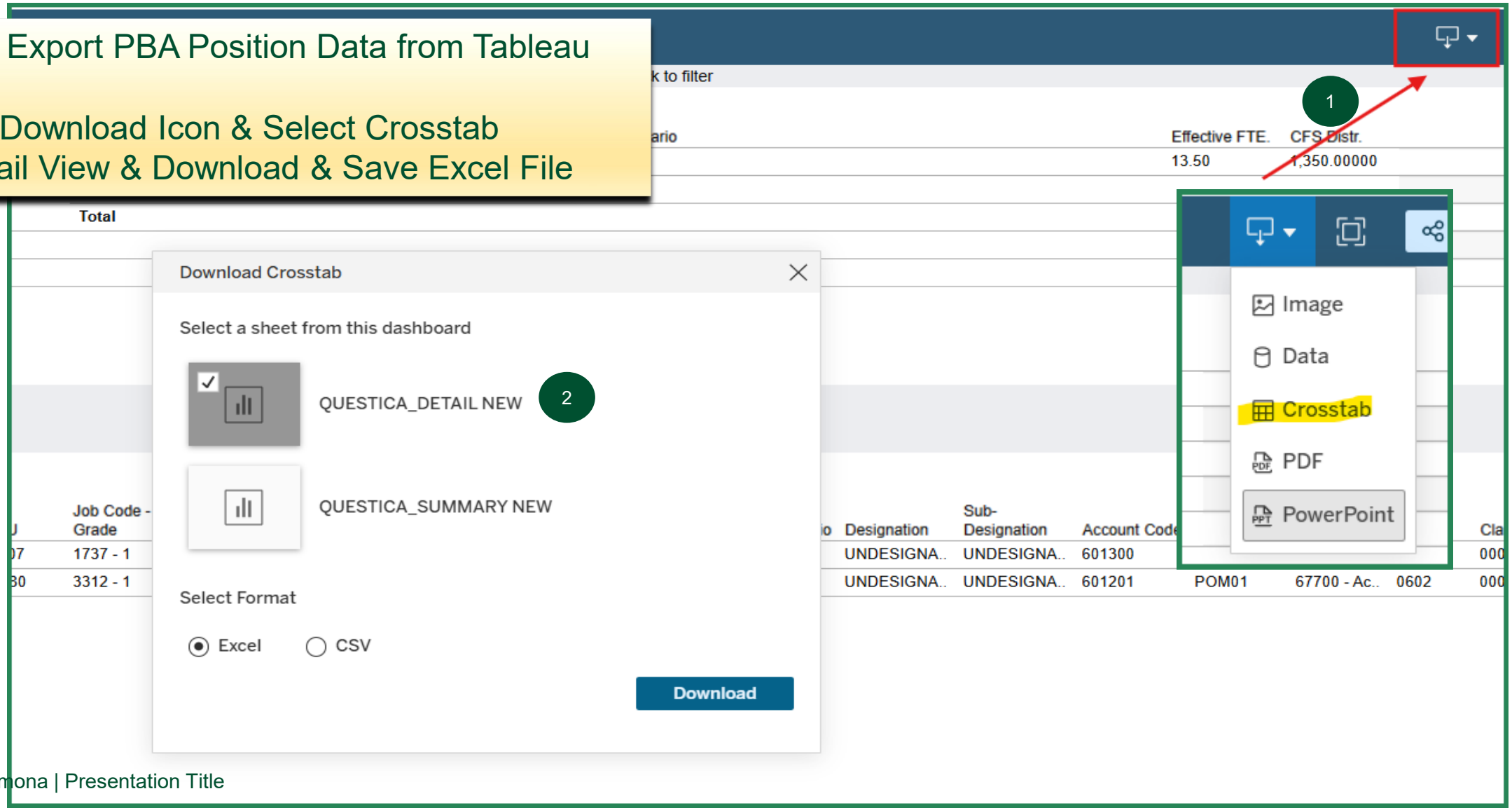
Updated: 12/8/2025 7:00:33 AM
click to filter

Charge Division	Charge College/Area	PSN No.	Position Status	BU	Job Code - Grade	Title	Employee / Bronco ID	Effective FTE	Budget Scenario	Designation	Sub-Designation	Account Code	Fund Code	CFS Dept ID	Pgm	Class	CFS Distr	Annual Budget by CFS
67400 - VP Administrative Affs Office	68000 - AVP Financial Services	00004022	Permanent	R07	1741 - 1	Acc	[redacted]	1.00	ORIGINAL	UNDESIGNA..	UNDESIGNA..	601300	POM01	67700 - Ac..	0602	00000	100.00000	54,324.00
		00004023	Permanent	M80	3312 - 1	Man	[redacted]	1.00	ORIGINAL	UNDESIGNA..	UNDESIGNA..	601201	POM01	67700 - Ac..	0602	00000	100.00000	115,344.00

IV. Tableau Questica Position Budget

STEPS to Export PBA Position Data from Tableau

1. Select the Download Icon & Select Crosstab
2. Select Detail View & Download & Save Excel File



IV. Tableau Questica Position Documentation

Tableau Questica Position Budget Report **Detail** Section:
Bottom Portion of Screen - Provides Information for a position's budget

1. All column headers outlined in Green will be entered into the PBA form
2. Excel download from Tableau – Enter Column C & Columns J, K & M - S

1

Detail
Updated: 12/18/2025 7:00:35 AM
click to filter

Tableau Position Report

PSN No.	Position Status	BU	Job Code - Grade	Title	Employee / Bronco ID	Effective FTE	Budget Scenario	Designation	Sub-Designation	Account Code	Fund Code	CFS Dept ID	Pgm	Class	CFS Distr	Annual Budget by CFS
00004022	Permanent	R07	1741 - 1	[redacted]		1.00	ORIGINAL	UNDESIGNA..	UNDESIGNA..	601300	POM01	67700 - Ac..	0602	00000	100.00000	54,324.00
00004023	Permanent	M80	3312 - 1	[redacted]		1.00	ORIGINAL	UNDESIGNA..	UNDESIGNA..	601201	POM01	67700 - Ac..	0602	00000	100.00000	115,344.00

2

	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
le	PSN No.	Positio	BU	Job	Title	Emp	Effe	Budget Scenario	Designation	Sub- Designation	Account Code	Fund Code	CFS Dept ID	Pgm	Class	CFS Distr	Annual Budget by CFS	
P	00004022	Perma	R07	174	[redacted]		1.0(	ORIGINAL	UNDESIGNA	UNDESIGNATED	601300	POM01	67700 - Acc	0602	00000	100.00000	54,324.00	ⓘ
	00004023	Perma	M80	331	[redacted]		1.0(	ORIGINAL	UNDESIGNA	UNDESIGNATED	601201	POM01	67700 - Acc	0602	00000	100.00000	115,344.00	ⓘ

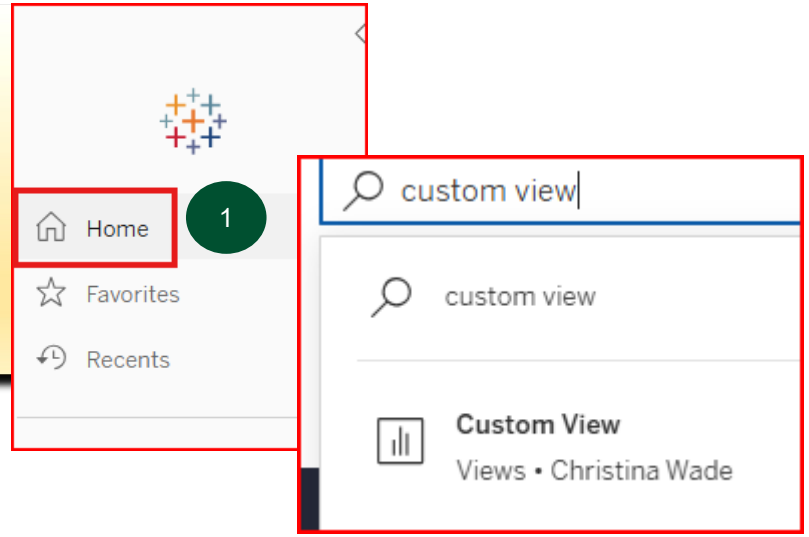
Export to Excel from Tableau Questica Position Budget Report

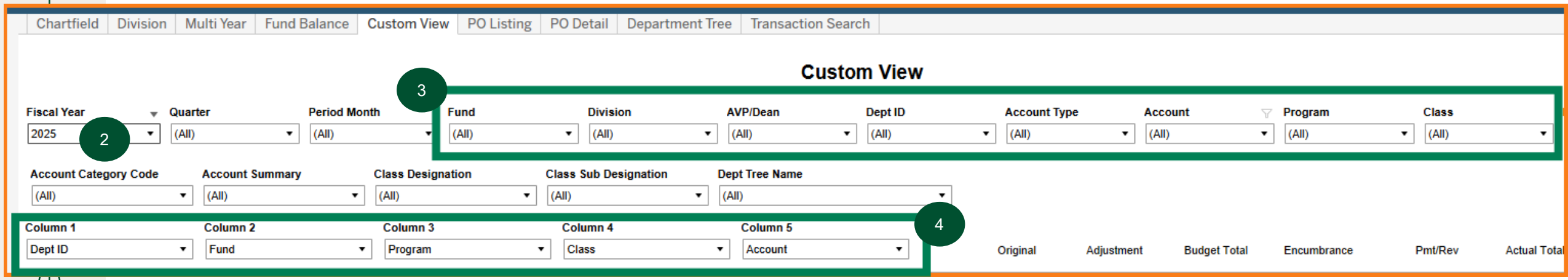
IV. Tableau Custom View Settings

STEPS for Transferring From an Operating Account

1. Log into Tableau Custom View to capture available balance
2. Check Fiscal Year (Current)
3. Select Fields to Filter
4. Set-up Column in the order noted below

   Fund – Dept ID – Program – Class - Account





IV. Tableau Custom View Settings

STEPS to Capture Operating Data from Custom View

Highlight the available balance. Take a screen shot of the results and save file.

Chartfield | Division | Multi Year | Fund Balance | Custom View | PO Listing | PO Detail | Department Tree | Transaction Search

Custom View

Fiscal Year	Quarter	Period Month	Fund	Division	AVP/Dean	Dept ID	Account Type	Account	Program	Class	Project
2025	(All)	(All)	TM001 - TF PaCE-...	ACADEMIC AFFAI...	PROF AND GLOB...	16616 - PaCE-Coll...	Expenditure	660003 - Supplies ...	0101 - General Ac...	(All)	None

Account Category Code	Account Summary	Class Designation	Class Sub Designation	Dept Tree Name
(All)	(All)	(All)	(All)	(All)

Column 1	Column 2	Column 3	Column 4	Column 5
Dept ID	Fund	Program	Class	Account

Column 1	Column 2	Column 3	Column 4	Column 5	Original	Adjustment	Budget Total	Encumbrance	Pmt/Rev	Actual Total	Available Balance
16616 - PaCE-College of Business	TM001 - TF PaCE-EXPENDITURE	0101 - General Academic Instruction	C3237 - MS in Accountancy	660003 - Supplies and Services		3,500.00	3,500.00			0.00	3,500.00
				Total		3,500.00	3,500.00			0.00	3,500.00
			C3397 - MS in Business Analytics	660003 - Supplies and Services		11,875.00	11,875.00			0.00	11,875.00
				Total		11,875.00	11,875.00			0.00	11,875.00
			C3422 - MS Digt Suppl Chn Mgmt	660003 - Supplies and Services		4,950.00	4,950.00			0.00	4,950.00
				Total		4,950.00	4,950.00			0.00	4,950.00
			C3445 - MS Digital Marketing	660003 - Supplies and Services		4,250.00	4,250.00			0.00	4,250.00
				Total		4,250.00	4,250.00			0.00	4,250.00
			Total			24,575.00	24,575.00			0.00	24,575.00
		Total				24,575.00	24,575.00			0.00	24,575.00
	Total					24,575.00	24,575.00			0.00	24,575.00

1

Cal Poly Pomona

FORM OVERVIEW & INPUT

V. PBA Form Overview

Cal Poly Pomona

APPLY VIS

- Budget Forms
- Questica Resources
- Resources & Guidelines
- Useful Links
- Glossary of Terms
- Contact Us

Submission Process

1. Select a form from the Budget Forms List
2. Select the proper SmartSheet link to submit your request
3. Submissions must be issued via SmartSheet Portals
4. Please direct questions to budget@cpp.edu

Forms

Budget Forms List

- Academic Personnel Position Request - Form 3769 (PDF)
- Capital Budget Transfer Form (XLSX)
- Dept. ID and Class Chartfield Request Form - Form 3814 (PDF)
- Dept. Reorganization Form (PDF)
- Payroll Expenditure Adjustment Request (XLSX)
- Student Assistant Position Number Request - Form 3813 (PDF)
- Position Budget Adjustment Template (XLSX)

Position Budget Adjustment Change Request

01/02/2025

Date*:

Division*:

Submitter's DeptID & Name*:

Journal Line (Name)*: PBA -

Brief Description:

Requested by*:

Approved by:

(the authorized signer of the dept. "losing" budget or VP's Office designee)

ORIGINAL ADJUSTMENT

Position Budget Adjustment ("Wage Adjustment")									*CFS Distribution*	
*input**	*input**	*input**	*auto calc*	*input**	*input**	*input**	*input**	*input**	*input**	
Position Number	Current Total Pos Budget $	New Total Pos Budget $	Total Pos Budget Change $	Account	Fund	DeptId	Pgm	Class	Budget Scenario	D
			-							
			-							
			-							
			-							
			-							
			-							
			-							
			-							
			-							
			-							
			-							
			-							
			-							
			-							
			-							

PBA | PBA Examples | Guidelines

https://www.cpp.edu/fas/budget/forms.shtml

PBA | PBA Examples | Guidelines

V. PBA Form Overview

Position Budget Adjustment Change Request

01/02/2025

1 Q

Date*:
Division*:
Submitter's DeptID & Name*:
Journal Line (Name)*: PBA -
Brief Description:
Requested by*:
Approved by:
(the authorized signer of the dept. "losing" budget or VP's Office designee)

2

Budget Scenario & Designation Checks

ORIGINAL	-	UNDESIGNATED	-
ADJUSTMENT	-	DESIGNATED	-
		FEES	-

3

Tableau Questica Dashboard
Tableau PS (Actuals) Dashboard

4 Q

5 Q

6 Q

Position Budget Adjustment ("Wage Adjustment")									CFS Distribution Change ("Position Allocation")						Budget Journal Output ("Change Request Bu ...es")	
input*	input*	input*	auto calc	input*	input*	input*	input*	input*	input*	input*	input*	input*	auto calc	auto calc	input*	input
Position Number	Current Total Pos Budget $	New Total Pos Budget $	Total Pos Budget Change $	Account	Fund	DeptId	Pgm	Class	Budget Scenario	Designation	Current Pos Allocation %	New Pos Allocation %	Position Alloc Change %	Position Alloc Change (number format)	Total Transfer	Document Line Number Description (Transfer To / From) LIMITED TO 30 CHARACTERS	Reason Journal Description (purpose for the adjustment)
			-										0.00000%	0.00000	-		
			-										0.00000%	0.00000	-		
													0.00000%	0.00000	-		
													0.00000%	0.00000	-		

7

DO NOT CHANGE THE FORMULA IN THIS COLUMN

Position Allocation (CFS Distribution) Calculator

	Current	Current %	PBA	New	New %
			$0.00	$0.00	
CFS1	-		$ -	$ -	
CFS2	-		$ -	$ -	
CFS3	-		$ -	$ -	
CFS4	-		$ -	$ -	
CFS5	-		$ -	$ -	
CFS6	-		$ -	$ -	
Totals	$0.00	0.00000%	$0.00	$0.00	0.00000%

Enter applicable values in blue cells

Seven Parts of the PBA Form

Sections (1,4,5,6) of the form will be entered into Questica Q
Sections (4,5,***6***,***7***) of the form ***may*** need to be entered on Form
Section 2 ensures the form is in balance
Section 3 are links to Position data reports in Tableau
Section 7 is a calculator used to redistribute position allocation %s
Shaded Grey columns are auto calculated fields

V. PBA Form Overview

Position Budget Adjustment Change Request

01/02/2025

Date*:

Division*:

Submitter's DeptID & Name*:

Journal Line (Name)*: PBA -

Brief Description:

Requested by*:

Approved by:

(the authorized signer of the dept. "losing" budget or VP's Office designee)

1 Q

Budget Scenario & Designation Checks

ORIGINAL	-	UNDESIGNATED	-
ADJUSTMENT	-	DESIGNATED	-
		FEES	-

2

Tableau Questica Dashboard

Tableau PS (Actuals) Dashboard

3

4 Q

5 Q

6 Q

Position Budget Adjustment ("Wage Adjustment")									CFS Distribution Change ("Position Allocation")						Budget Journal Output ("Change Request Bu ss")		
input*	input*	input*	auto calc	input*	input*	input*	input*	input*	input*	input*	input*	input*	auto calc	auto calc	auto calc	input*	input
Position Number	Current Total Pos Budget $	New Total Pos Budget $	Total Pos Budget Change $	Account	Fund	DeptId	Pgm	Class	Budget Scenario	Designation	Current Pos Allocation %	New Pos Allocation %	Position Alloc Change %	Position Alloc Change (number format)	Total Transfer	Document Line Number Description (Transfer To / From) LIMITED TO 30 CHARACTERS	Reason Journal Description (purpose for the adjustment)
			-										0.00000%	0.00000	-		
			-										0.00000%	0.00000	-		
			-										0.00000%	0.00000	-		
			-										0.00000%	0.00000	-		

Position Budget Adjustment Change Request

01/02/2025

1

Date*:

Division*:

Submitter's DeptID & Name*:

Journal Line (Name)*: PBA -

Brief Description:

Requested by*:

Approved by:

(the authorized signer of the dept. "losing" budget or VP's Office

PBA Form & Questica

Section 1 will not need to be entered on the form

**Section 1 will be entered in Q when creating a new change request record.

V. PBA Form Overview

Position Budget Adjustment Change Request

01/02/2025

Date*:

Division*:

Submitter's DeptID & Name*:

Journal Line (Name)*: PBA -

Brief Description:

Requested by*:

Approved by:

(the authorized signer of the dept. "losing" budget or VP's Office designee)

1 Q

Budget Scenario & Designation Checks

ORIGINAL	-	UNDESIGNATED	-
ADJUSTMENT	-	DESIGNATED	-
		FEES	-

2

Tableau Questica Dashboard

Tableau PS (Actuals) Dashboard 3

Position Budget Adjustment ("Wage Adjustment" 4 Q

CFS Distribution Change ("Position Allocation 5 Q

Budget Journal Output ("Change Reques 6 Q

input*	input*	input*	calc	input*	input*	input*	input*	input*	input*	input*	input*	input*	calc	auto calc	auto calc	input*	
Position Number	Current Total Pos Budget $	New Total Pos Budget $	Total Pos Budget Change $	Account	Fund	DeptId	Pgm	Class	Budget Scenario	Designation	Current Pos Allocation %	New Pos Allocation %	Position Alloc Change %	Position Alloc Change (number format)	Total Transfer	Document Line Number Description (Transfer To / From) LIMITED TO 30 CHARACTERS	Reason Journal Description (purpose for the adjustment)
			-										0.00000%	0.00000	-		
			-										0.00000%	0.00000	-		
			-										0.00000%	0.00000	-		
			-														

6

Budget Journal Output ("Change Request Budget Lines")

R	S	T	U
*input**	*input*		Line D
Document Line Description (Transfer To / From) LIMITED TO 30 CHARACTERS	Reason Journal Description (purpose for the adjustment)		*Column R is limited to 30 Character*
			-
			-
			-
			-
			-

PBA Form & Questica

Section 6 – Document Line Description

Column R has a limit of 30 characters
Column S is optional

**Column U on the PBA Form checks character count
**Column R appears in Tableau at the GL level

PBA Prep & Input Pointers

Tableau Reports

- Questica Position Budget Report
- Custom View

Input Pointers

- A separate line needs to be entered for each position's Budget Scenario
- If more than one Budget Scenario per position, the Total Budget amount (Column C) is entered for each Budget Scenario line & must be identical $$ amounts
- O/E line -
  - Position # (Column B) should reference 'Operating' 'Operations' etc.
  - Enter Transfer Amount in New Total Pos Budget (Column D)
  - Designation (Column L) should match the position(s) Designation
  - Current and New Position Allocation % (Column M&N) should be 100%

Vi. Input **Wage Adjustment** on PBA Form

Detail
Updated: 1/13/2026 7:00:52 AM
click to filter

Tableau Position Report

PSN No.	Position Status	BU	Job Code - Grade	Title	Employee / Bronco ID	Effective FTE	Budget Scenario	Designation	Sub-Designation	Account Code	Fund Code	CFS Dept ID	Pgm	Class	CFS Distr	Annual Budget by CFS
00003852	Permanent	R09	1038 - 4	Student Acco..		1.00	ADJUSTMENT	UNDESIGNA..	UNDESIGNA..	601300	PCR01	67900 - St..	0602	00000	100.00000	84,552.00

Tree | Transaction Search

Custom View

Tableau Custom View Report

AVP/Dean: AVP ADMIN SERV...
Dept ID: 67500 - AVP Admi...
Account Type: Expenditure
Account: 660003 - Supplies ...
0606 - General Ad...
(All)
Project: None
Dept Tree Name: (All)
Column 5: Account

	Original	Adjustment	Budget Total	Encumbrance	Pmt/Rev	Actual Total	Available Balance
660003 - Supplies and Services		20,000.00	20,000.00			0.00	20,000.00
Total		20,000.00	20,000.00			0.00	20,000.00

Position Budget Adjustment ("Wage Adjustment")

*input**	*input**	*input**	*auto calc*
Position Number	Current Total Pos Budget $	New Total Pos Budget $	Total Pos Budget Change $
00003852	84,552.00	94,552.00	10,000.00
from operating		(10,000.00)	(10,000.00)

PBA Form

*Wage Adjustment Section input from Tableau Questica Position & Custom View (O/E) Reports

1. PSN No from Tableau will be input in Column B on PBA Form
    1. When transferring from O/E input 'Operating' under column B
2. Annual Budget by CFS from Tableau will be input into Column C on PBA Form
3. Enter amount of Transfer from O/E in Column D
4. Enter New Total Pos Budget in Column D

Vii. Input **Position Allocation** on PBA Form

Detail
Updated: 1/13/2026 7:00:52 AM
click to filter

Tableau Position Report

PSN No.	Position Status	BU	Job Code - Grade	Title	Employee / Bronco ID	Effective FTE	Budget Scenario (1)	Designation (2)	Sub-Designation	Account Code (3)	Fund Code (3)	CFS Dept ID (3)	Pgm (3)	Class (3)	CFS Distr (4)	Annual Budget by CFS
00003852	Permanent	R09	1038 - 4	Student Acco..		1.00	ADJUSTMENT	UNDESIGNA..	UNDESIGNA..	601300	PCR01	67900 - St..	0602	00000	100.00000	84,552.00

Custom View

Tableau Custom View Report

Fiscal Year	Quarter	Period Month	Fund	Division	AVP/Dean	Dept ID	Account Type	Account	Program	Class	Project
2025	(All)	(All)	POM01 - OPERAT...	ADMIN AFFAIRS	AVP ADMIN SERV...	67500 - AVP Admi...	Expenditure				None

Account Category Code	Account Summary	Class Designation	Class Sub Designation	Dept Tree Name
(All)	(All)	(All)	(All)	(All)

Column 1	Column 2	Column 3	Column 4	Column 5	Original	Adjustment (1)	Budget Total	Encumbrance	Pmt/Rev	Actual Total	Available Balance
67500 - AVP Administrative Services	ID	0606 - General Administration	00000 - No Class Value	660003 - Supplies and Services		20,000.00	20,000.00			0.00	20,000.00
				Total		20,000.00	20,000.00			0.00	20,000.00
			Total			20,000.00	20,000.00			0.00	20,000.00
		Total				20,000.00	20,000.00			0.00	20,000.00
	Total					20,000.00	20,000.00			0.00	20,000.00
Grand Total						20,000.00	20,000.00			0.00	20,000.00

F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
						CFS Distribution Change ("Position Allocation")					udget Journal Output ("Change Request Budget Lines				
input*	input*	input*	input*	input*	input*	input*	input*	input*	auto calc	auto calc	auto calc	input*	input		Line
Account (3)	Fund (3)	Deptid (3)	Pgm (3)	Class (3)	Budget Scenario (1)	Designation (2)	Current Pos Allocation % (4)	New Pos Allocation %	Position Alloc Change %	Position Alloc Change (number format)	Total Transfer	Document Line Description (Transfer To / From) LIMITED TO 30 CHARACTERS	Reason Journal Desc		Column R is limited to 30 Character
601300	PCR01	67900	0602	00000	ADJUSTMENT	UNDESIGNATED	100.00000%	100.00000%	0.00000%	0.00000	10,000.00	TEMP FROM OE TO 3852			21
660003	PCR01	67500	0606	00000	ADJUSTMENT	UNDESIGNATED	100.00000%	100.00000%	0.00000%	0.00000	(10,000.00)	TEMP FROM OE TO 3852			21
									0.00000%	0.00000	-				-

Vii. Input **Position Allocation** on PBA Form

1. Current & New Pos Allocation (Column M & N) for O/E Transfers will always be 100%
   1. Column L for O/E transfers should match the Designation of the position affected
2. Doc Line Description (Column R) should summarize Type of Transfer
3. Count of characters (Column U) limited to 30
4. Scenario & Designation are in balance – totals should be $0

F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
CFS Distribution Change ("Position Allocation")											udget Journal Output ("Change Request Budget Lines				
input*	input*	input*	input*	input*	input*	input*	input*	input*	auto calc	auto calc	auto calc	input*	input		Line
Account	Fund	DeptId	Pgm	Class	Budget Scenario	Designation	Current Pos Allocation %	New Pos Allocation %	Position Alloc Change %	Position Alloc Change (number format)	Total Transfer	Document Line Description (Transfer To / From) LIMITED TO 30 CHARACTERS	Reason Journal Desc		Column R is limited to 30 Character
601300	PCR01	67900	0602	00000	ADJUSTMENT	UNDESIGNATED	100.00000%	100.00000%	0.00000%	0.00000	10,000.00	TEMP FROM OE TO 3852			21
660003	PCR01	67500	0606	00000	ADJUSTMENT	UNDESIGNATED	100.00000%	100.00000%	0.00000%	0.00000	(10,000.00)	TEMP FROM OE TO 3852			21

1

2

3

K	L	M	N	O
Budget Scenario & Designation Checks				
ORIGINAL	-		UNDESIGNATED	
ADJUSTMENT	-		DESIGNATED	
			FEES	

4

When position(s) & OE have the same budget scenario, and the position is single funded, one line per position & one line per OE account is input

Vii_i. How to Use the Calculator

When to Use the Calculator

- When a Position has a Change in Position Allocation %

Indicators

- Split Funded Positions
- Position(s) &/or OE have different Budget Scenarios

- **One Position Per Calculator-input only in Blue Shaded Cells**

1. Enter Position's Total Budget
2. Enter Current % amounts for Budget Scenarios
   1. Original First Row (Green)
   2. Adjustment Second Row (Red)
3. Enter the amount to be transferred in column AF
   1. If the transfer is temporary, enter the $ on the Adjustment row
   2. If the transfer is permanent, enter the $ on the Original row
4. Copy the new %s from Column AH and paste them as text into Column N, New Position Allocation

AC	AD	AE	AF	AG	AH	AI
Position Allocation (CFS Distribution) Calculator						
	Total Budget	**Current %**	**PBA**	**New**	**New %**	**Budget Scenario**
	1		**$0.00**	**$0.00**		
CFS1	-	2	$ -	$ -	4	ORIGINAL
CFS2	-		$ 3 -	$ -		ADJUSTMENT
CFS3	-		$ -	$ -		
CFS4	-		$ -	$ -		
CFS5	-		$ -	$ -		
CFS6	-		$ -	$ -		
Totals	$0.00	0.00000%	$0.00	$0.00	**0.00000%**	
Enter applicable values in blue cells						

Vii_i. How to Use the Calculator

Example

Move one time funding from an O/E account to increase a position's budget

When to Use the Calculator

- When a Position has a Change in Position Allocation %

Indicators

- Split Funded Positions
- Position(s) &/or OE have different Budget Scenarios

Detail

Updated: 1/13/2026 7:00:52 AM

click to filter

Tableau Position Report

Effective FTE	Budget Scenario	Designation	Sub-Designation	Account Code	Fund Code	CFS Dept ID	Pgm	Class	CFS Distr	Annual Budget by CFS
1.00	ORIGINAL	UNDESIGNA..	UNDESIGNA..	601300	POM01	67700 - Ac..	0602	00000	100.00000	54,552.00

Tree | Transaction Search

Custom View

Tableau Custom View Report

AVP/Dean	Dept ID	Account Type	Account	Program	Class	Project
AVP ADMIN SERV...	67500 - AVP Admi...	Expenditure	660003 - Supplies ...	0606 - General Ad...	(All)	None

Dept Tree Name: (All)

Column 5: Account

	Original	Adjustment	Budget Total	Encumbrance	Pmt/Rev	Actual Total	Available Balance
660003 - Supplies and Services		20,000.00	20,000.00			0.00	20,000.00
Total		20,000.00	20,000.00			0.00	20,000.00

B	C	D	E	F	G	H	I	J	K	L	M	N
Position Budget Adjustment ("Wage Adjustment")				CFS Distribution Change ("Position Allocation")								
input*	input*	input*	auto calc	input*	input*	input*	input*	input*	input*	input*	input*	input*
Position Number	Current Total Pos Budget $	New Total Pos Budget $	Total Pos Budget Change $	Account	Fund	DeptId	Pgm	Class	Budget Scenario	Designation	Current Pos Allocation %	New Pos Allocation %
00004022	54,552.00	64,552.00	10,000.00	601300	pom01	67700	0602	00000	ORIGINAL	UNDESIGNATED	100.00000%	0.00000%
from operating	-	(10,000.00)	(10,000.00)	660003	pom01	67500	0606	00000	ADJUSTMENT	UNDESIGNATED	100.00000%	100.00000%

Vii_i. How to Use the Calculator

1. Enter Position's Total Budget
2. Enter Current % amounts for Budget Scenarios
   1. Original First Row (Green)
   2. Adjustment Second Row (Red)
3. Enter the amount to be transferred in column AF
   1. If the transfer is temporary, enter the $ on the Adjustment row
   2. If the transfer is permanent, enter the $ on the Original row
4. Copy the new %s from Column AH and paste them as text into Column N, New Position Allocation %

AC	AD	AE	AF	AG	AH	AI
Position Allocation (CFS Distribution) Calculator						
	Total Budget	**Current %**	**PBA**	**New**	**New %**	**Budget Scenario**
	$54,552.00		**$10,000.00**	**$64,552.00**		
CFS1	54,552.00	100.00000%	$ -	$ 54,552.00	**84.50861%**	ORIGINAL
CFS2	-		10,000.00	$ 10,000.00	**15.49139%**	ADJUSTMENT
CFS3	-		$ -	$ -	**0.00000%**	
CFS4	-		$ -	$ -	**0.00000%**	
CFS5	-		$ -	$ -	**0.00000%**	
CFS6	-		$ -	$ -	**0.00000%**	
Totals	$54,552.00	100.00000%	$10,000.00	$64,552.00	**100.00000%**	
Enter applicable values in blue cells						

1 2 3.1 4

B	C	D	E	F	G	H	I	J	K	L	M	N
Position Budget Adjustment ("Wage Adjustment")				*CFS Distribution Change ("Position Allocation")*								
*input**	*input**	*input**	*auto calc*	*input**	*input**	*input**	*input**	*input**	*input**	*input**	*input**	*input**
Position Number	Current Total Pos Budget $	New Total Pos Budget $	Total Pos Budget Change $	Account	Fund	DeptId	Pgm	Class	Budget Scenario	Designation	Current Pos Allocation %	New Pos Allocation %
00004022	54,552.00	64,552.00	10,000.00	601300	pom01	67700	0602	00000	ORIGINAL	UNDESIGNATED	100.00000%	0.00000%
from operating	-	(10,000.00)	(10,000.00)	660003	pom01	67500	0606	00000	ADJUSTMENT	UNDESIGNATED	100.00000%	100.00000%

B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Position Budget Adjustment ("Wage Adjustment")				*CFS Distribution Change ("Position Allocation")*											*dget Journal Outp*
*input**	*input**	*input**	*auto calc*	*input**	*input**	*input**	*input**	*input**	*input**	*input**	*input**	*input**	*auto calc*	*auto calc*	*auto calc*
Position Number	Current Total Pos Budget $	New Total Pos Budget $	Total Pos Budget Change $	Account	Fund	Deptl	Pgm	Class	Budget Scenario	Designation	Current Pos Allocation %	New Pos Allocation %	Position Alloc Change %	Position Alloc Change (number)	Total Transfer
00004022	54,552.00	64,552.00	10,000.00	601300	pom01	67700	0602	00000	ORIGINAL	UNDESIGNATED	100.00000%	84.50861%	-15.49139%	-15.49139	-
from operating	-	(10,000.00)	(10,000.00)	660003	pom01	67500	0606	00000	ADJUSTMENT	UNDESIGNATED	100.00000%	100.00000%	0.00000%	0.00000	(10,000.00)
00004022	54,552.00	64,552.00	10,000.00	601300	pom01	67700	0602	00000	ADJUSTMENT	UNDESIGNATED	0.00000%	15.49139%	15.49139%	15.49139	10,000.00
													0.00000%	0.00000	

1 2 3.1 4

Budget Analysts : Divisions & Colleges

- Amy Cher
  - Student Affairs
  - IT&IP
  - President's Office & PCIA
  - Academic Affairs
    - Academic Programs
    - Student Success
    - Academic Innovation
    - AVP Research
    - Enrollment Services
    - Colleges
    - CoB, AG, CEIS, ENV, ENGR & CLASS

- Naysia Caldwell
  - Administrative Affairs
  - University Advancement
  - Academic Affairs
    - Provost's Office
    - Academic Resources
    - Academic Planning
    - Faculty Affairs
    - Colleges
    - SCI, CPGE, Collins & Library

Cal Poly Pomona

DEMO