



Operating Expense (OE) Budget Transfers

By Budget Planning & Analysis
October 2024

Agenda

- **Questica**
- **OE Budget Transfer Requirements**
- **OE Budget Transfer Principles**
- **Budget Transfer User Interface**
 - **Input into Questica Screen**
 - **Import Spreadsheet**
- **Budget Transfer Workflow Process**
- **Q & A**

Questica

- **What is Questica?**
 - Position-based budgeting system
- **Why are we using Questica?**
 - Current
 - Process budget transfers
 - Attaching documents to budget transfers
 - Future
 - Precise Budget Planning
 - Personnel Reports
- **Who should use Questica?**
 - Those who prepare budget transfers
- **When do we use Questica?**
 - FY24/25 – Option to submit Budget Transfers directly into Questica starting in November
 - Still have the option to submit the Budget Transfer Form via BP&A's Smartsheet portal.
 - FY25/26 – Budget Transfers to be submitted via Questica

Questica Cont.

- **Roll-Out Plan**



Training
Provide Position Budget Adjustment (PBS) form training. Optional O/E budget transfer (direct input) training for early adopters.

OE Transfers
Divisions & AVP/Dean levels can opt in to submit O/E transfers directly in Questica. Complete training as a prerequisite.

Training
Annual Budget Development Training. Divisions will learn how to prepare budget in Questica (distributed model).

Roll-Out
Divisions will prepare FY25-26 budget directly in Questica (distributed model).

Aux Enterprise
Parking, UHS, CPGE budget due end of June.

Budget Due
FY25-26 budget will be due in mid- to late-September.
Training
BP&A will provide O/E and PBA (direct input) training. Divisions can wait to adopt PBA direct input.

Questica Cont.

- **FY Timeline**



- Annual Budget Build
 - When Divisional Budget Officers and Divisional Analysts build the annual budget.
- Annual Budget Loads
 - July - Auxiliary Enterprises
 - September – State Operating Funds
- Budget Maintenance
 - July – June
 - Auxiliary Enterprises can process budget transfers once their budget has been loaded.
 - October – June
 - Starting in October, can process budget transfers once State Operating budgets have been loaded.

Questica Cont.

- **Terminology**

- Change Requests – What Questica calls a budget transfer
- Fund-Department – the cost center
- Stages – There are three stages in the process.
 - Stage 1 – Currently, in the draft stage; the level prior to promotion.
 - Stage 2 – 1st BP&A Approval
 - Stage 3 – 2nd and final BP&A Approval
- Promote – Advancing a budget transfer to the next stage.
- Demote – Returning a budget transfer to the previous stage for corrections.
- Test Site – Non-production site that allows an individual to practice/test processes.
- Production Site – Live site that will result in the transaction being processed.
- Ledger Group – Questica Ledger (STD_BUDGET)

OE Budget Transfers Requirements

- **User Access to Questica**
 - ServiceNow Request
- **PDF of Tableau Crosstab**
 - Backup Documentation
 - Confirm that there is sufficient available budget in the operating account codes to support the transfer.
 - Take into account pending expenses: POs, Travel, Direct Pays, Invoices, etc.
 - Filters
 - Select applicable Dept ID(s) and Fund Code(s)
 - Account Type: Select Expenditure
 - Account Summary: Deselect Benefits
 - Account: Deselect Staff, Faculty, and MPP Salary Account Codes
 - Column Set-Up
 - Fiscal Year - Dept ID – Fund – Class – Account

OE Budget Transfers Requirements Cont.

- PDF of Tableau Crosstab Cont.

View: ALL Metrics Share

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

Custom View

Fiscal Year: 2024 Quarter: (All) Period Month: (All) Fund: POM01 - OPERAT... Division: ADMIN AFFAIRS AVP/Dean: AVP BUDGET & P... Dept ID: 75000 - Budget Pl... Account Type: Expenditure Account: (Multiple values) Program: 0602 - Fiscal Oper... Class: (All) Project: None

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

Column 1	Column 2	Column 3	Column 4	Column 5	Original	Adjustment	Budget Total	Encumbrance	Pmt/Rev	Actual Total	Available Balance
2024	75000 - Budget Planning & Analysis	POM01 - OPERATING FUND	00000 - No Class Value	616002 - I/T Hardware					2,128.95	2,128.95	-2,128.95
				660003 - Supplies and Services	15,000.00	30,000.00	45,000.00			0.00	45,000.00
				Total	15,000.00	30,000.00	45,000.00		2,128.95	2,128.95	42,871.05
		Total			15,000.00	30,000.00	45,000.00		2,128.95	2,128.95	42,871.05
Grand Total					15,000.00	30,000.00	45,000.00		2,128.95	2,128.95	42,871.05

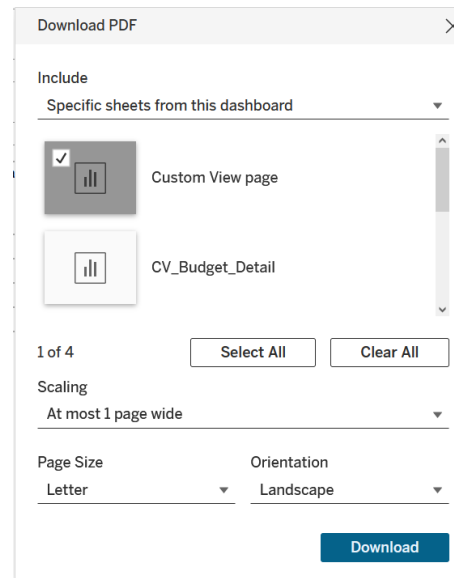
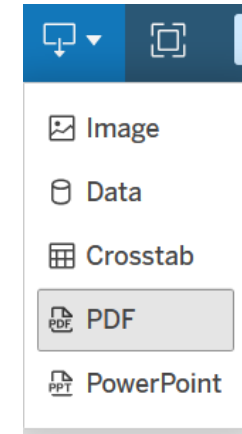
Custom View page

					Original	Adjustme..	Budget Total	Encumbr..	Pmt/Rev	Actual Total	Available Balance
2024	75000 - Budget Planning & Analysis	POM01 - OPERATING FUND	00000 - No Class Value	616002 - I/T Hardware					2,128.95	2,128.95	-2,128.95
				660003 - Supplies and Services	15,000.00	30,000.00	45,000.00			0.00	45,000.00
				Total	15,000.00	30,000.00	45,000.00		2,128.95	2,128.95	42,871.05
		Total			15,000.00	30,000.00	45,000.00		2,128.95	2,128.95	42,871.05
	Total				15,000.00	30,000.00	45,000.00		2,128.95	2,128.95	42,871.05
Grand Total					15,000.00	30,000.00	45,000.00		2,128.95	2,128.95	42,871.05

OE Budget Transfers Requirements Cont.

- **PDF of Tableau Crosstab Cont.**

- Make your selections by Filtering the applicable Fields
- Select the Download Drop Down
- Select Crosstab
 - Select Specific Sheets from this Dashboard: “Custom View page”
 - Scaling: 1 Page Wide
 - Orientation: Landscape



OE Budget Transfers Requirements Cont.

- **Monthly Deadlines**

- Submissions received by the last business day of the month will be processed in the corresponding month.
- Submissions that are demoted due to errors, lack of supporting documentation, etc. may not post in the accounting period that it was submitted if the corrections are not resolved in a timely manner.

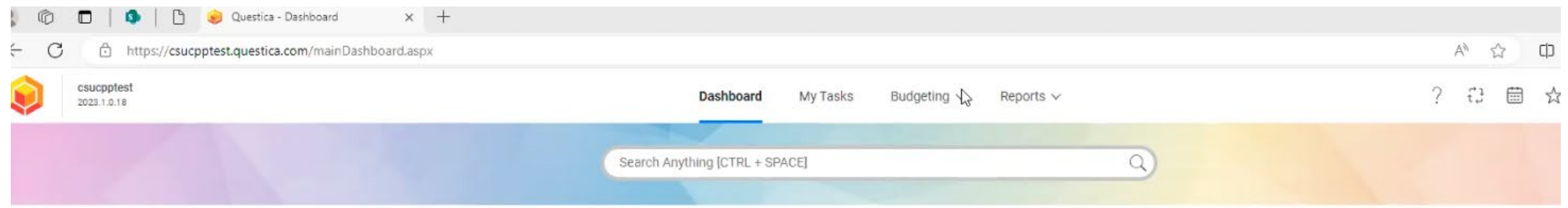
OE Budget Transfer Principles

- **Do not Zero-Out Available Budget Deficits at the Account Code Level.**
- **Cross Fund Transfers are NOT Allowed**
 - The Transfer by Fund Code must Net to Zero
- **POM01 Funding Designation and Sub-Designation Must Match**
 - Examples:
 - Designated>GI2025 funding can only go to GI2025 class codes
 - Fees>Student Success Fee funding can only go to SSF class codes
 - Undesignated Funds can only be transferred into Undesignated class codes
 - Note: All PCR funds are considered undesignated
- **Cannot Transfer between Revenue Account Codes**
- **Salary Account Codes are Prohibited except for the following accounts**
 - Overtime, Stipends, and Student Assistants
 - Please note that Position Budget Adjustments are used to adjust Salary Budgets.
- **Once annual operating budget has been received, transfer into applicable account codes at the beginning of the Fiscal Year.**

OE Budget Transfer User Interface

Questica Interface

- **Questica Link : <https://csucpp.questica.com/mainDashboard.aspx>**
- **Questica Home Page**



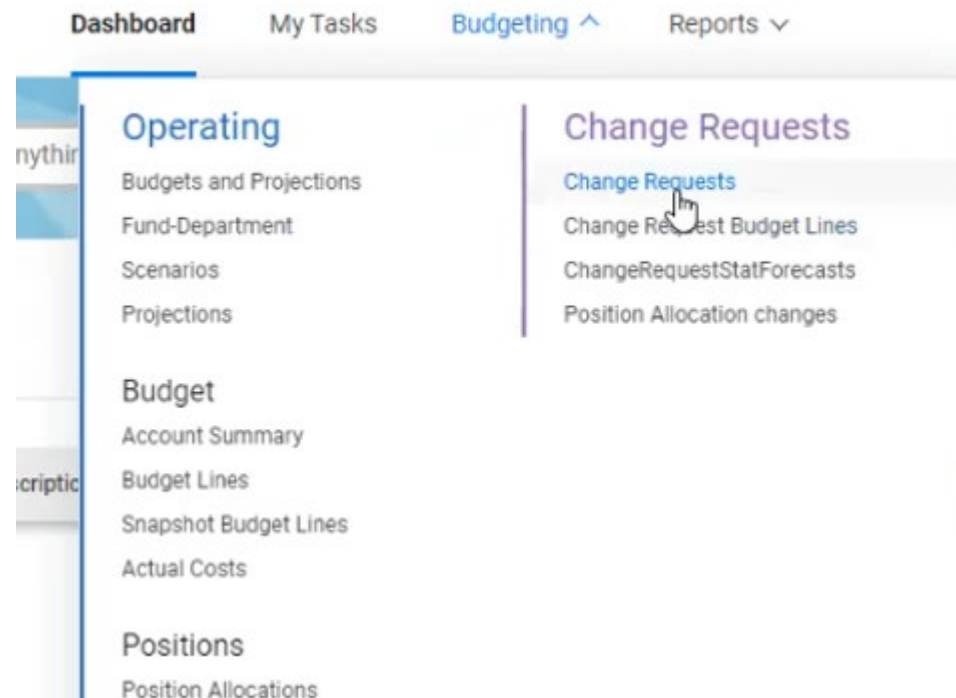
Change Request Status ▾

Snapshot Change R...	Change Request Type	Change Request Stage Output Description	Change Request Journal Line Ref (ex: ALB18-00...	Change Request Journal Line (Title)	Change Request Pu...	
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OE Budget Transfer User Interface

Two Options : Enter In Questica or Import/Export Data into Questica

Budgeting > Change Requests > Change Requests



OE Budget Transfer User Interface

Change Request Home Screen

Ensure FY is current

Select the Green + sign in right hand corner of screen to add a new request

The screenshot displays the 'Change Request Home Screen' within a web application. The top navigation bar includes 'Dashboard', 'My Tasks', 'Budgeting' (selected), and 'Reports'. The main header shows 'Change Requests | 2024 - 2025' and a search bar labeled 'Search Change Requests'. Below the header, there are two filter dropdowns: 'All Change Request Types' and 'Any Status'. A table with columns 'Budget Year', 'Change Re...', 'Journal LI...', 'Journal Line (Title)', 'Brief Description', and 'Change Request Stage' is visible. A green '+ Add' button is located in the top right corner. At the bottom, a 'Let's Get Started' section contains a 'Load Data' button with a mouse cursor pointing to it.

Budget Year	Change Re...	Journal LI...	Journal Line (Title)	Brief Description	Change Request Stage
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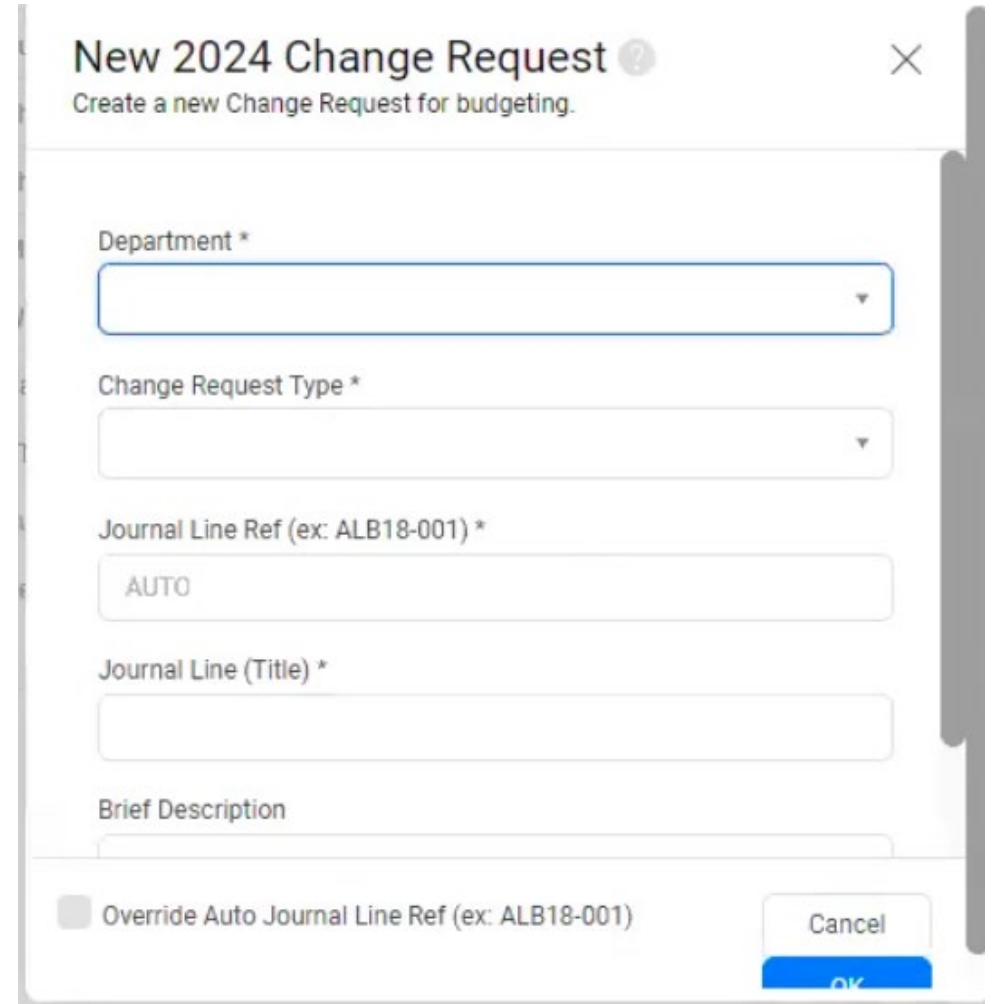
Let's Get Started

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

Load Data

OE Budget Transfer User Interface

- **Enter Fields listed below**
 - Department
 - Requestor's Dept ID
 - Change Request Type
 - Budget Transfer
 - Journal Line Ref
 - Auto populated field
 - This field will be reflected in Tableau
 - Journal Line (Title)
 - Identifies the Budget Transfer



The screenshot shows a web form titled "New 2024 Change Request" with a subtitle "Create a new Change Request for budgeting." The form contains several input fields and a checkbox:

- Department ***: A dropdown menu.
- Change Request Type ***: A dropdown menu.
- Journal Line Ref (ex: ALB18-001) ***: A text input field containing the value "AUTO".
- Journal Line (Title) ***: A text input field.
- Brief Description**: A text input field.
- Override Auto Journal Line Ref (ex: ALB18-001)**: A checkbox that is currently unchecked.
- Buttons**: "Cancel" and "OK" buttons are located at the bottom right of the form.

OE Budget Transfer User Interface

- **Journal Line Title (Naming Convention)**

- BT – Accounting Period – Division - Dept ID – Description of the Budget Transfer
 - BT – Identifies that it is an OE Budget Transfer
 - Accounting Period – Identifies the period the transfer was submitted and ultimately processed.
 - Division – Identifies the requestor's division
 - Dept ID – Identifies the requestor's department
 - Description of the Budget Transfer – Brief description of the transfer
- Example
 - BT – 04 – ADMN – 75000 – Annual Budget Distribution

OE Budget Transfer User Interface

- **Journal Line Title Cont.**

- *Division Abbreviations*

- ACAD - Academic Affairs
- ADMN – Administrative Affairs
- ITIP – Info Tech & Inst Planning
- PRES – Office of the President
- PCIA – People, Cltr, & Inst Affairs
- STAF – Student Affairs
- UADV – University Advancement
- UNIV – University Level

- *Accounting Periods*

- 01 – July
- 02 – August
- 03 – September
- 04 – October
- 05 – November
- 06 – December
- 07 – January
- 08 – February
- 09 – March
- 10 – April
- 11 – May
- 12 – June

OE Budget Transfer User Interface

- **Budget Transfer Documents Screen**

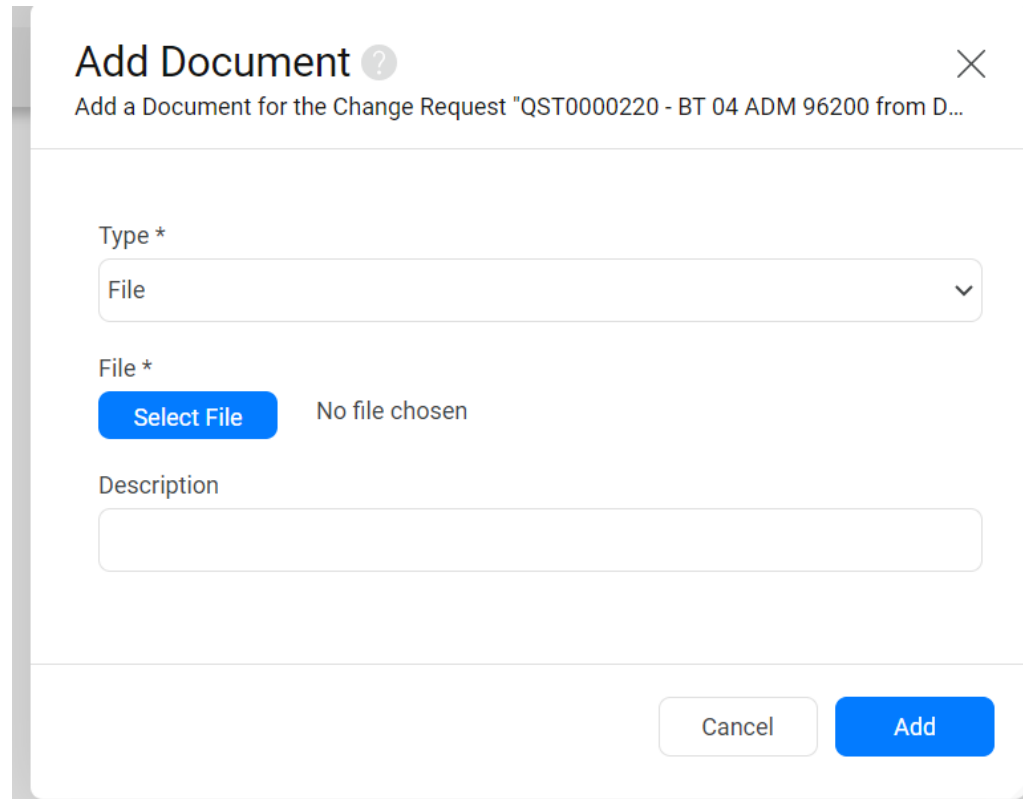
- Select the General menu option
- Select Documents
- Select the Green + sign to add backup documentation related to the Budget Transfer

The screenshot displays the OE Budget Transfer User Interface. The browser address bar shows the URL: `csucpptest.questica.com/changerequest_documents.aspx?ID=239&ScenarioID=239`. The page header includes the text "1-PROPOSED TRANSFER" and navigation options for "2024 - 2025", "QST0000220 - BT 04 ADM 96200 from DM078 to DM050", and "Main (Active)". A "Promote" button is visible in the top right corner. The main content area is titled "Documents" and features a menu with options: "Change Request", "Security", "Documents", "History", and "Scenario". The "Documents" option is currently selected. An "Add Document" dialog box is open, prompting the user to "Add a Document for the Change Request 'QST0000220 - BT 04 ADM 96200 from D...". The dialog includes a "Type *" dropdown menu set to "File", a "File *" section with a "Select File" button and the text "No file chosen", and a "Description" text input field. At the bottom of the dialog are "Cancel" and "Add" buttons. The bottom right corner of the page features the "PolyPomona" logo and the page number "19".

OE Budget Transfer User Interface

- **General > Documents**

- A pop-up screen will appear.
- Select the Blue Select File button to add documents.
- Select the Blue Add button to add them to Qestica.



The screenshot shows a pop-up window titled "Add Document" with a close button (X) in the top right corner. Below the title is a subtitle: "Add a Document for the Change Request 'QST0000220 - BT 04 ADM 96200 from D...". The form contains three main sections: 1. "Type *" with a dropdown menu currently set to "File". 2. "File *" with a blue "Select File" button and the text "No file chosen". 3. "Description" with an empty text input field. At the bottom of the form are two buttons: a light gray "Cancel" button and a blue "Add" button.

OE Budget Transfer User Interface

- **General > Documents**
 - Successful document upload.

1-PROPOSED TRANSFER

2024 - 2025 | QST0000220 - BT 04 ADM 96200 from DM078 to DM050 | Main (Active) Promote

General | Operating | Capital | Reports

Documents

+ Add | T Value Bar | ⌵ Filter | 📄 Layout

[T] Select a cell to view its value.

Description	Resource
<input type="checkbox"/> pbapresentation1022.pdf	pbapresentation1022.pdf

OE Budget Transfer User Interface

- **Budget Transfer Operating Budget Screen**
 - Select the Operating menu option
 - Select Change Request Budget Lines

The screenshot displays a web browser window with the URL `csucpp.questica.com/changerequest_documents.aspx?Load=true&ID=216`. The page header includes "2-MANAGEMENT REVIEW" and navigation information: "2024 - 2025 | QST0000196 - BT 04 OoP 73700 to Various 1576 | Main (Active)". A dropdown menu is open under "Operating", with "Change Request Budget Lines" highlighted. Below the menu, a "Documents" section contains a table with two rows:

Description	Resource
<input type="checkbox"/> OOP_Transfers_202410 (1).xlsx	OOP_Transfers_202410 (1).xlsx
<input type="checkbox"/> OOP_Transfers_202410_backup (PDF).pdf	OOP_Transfers_202410_backup (PDF).pdf

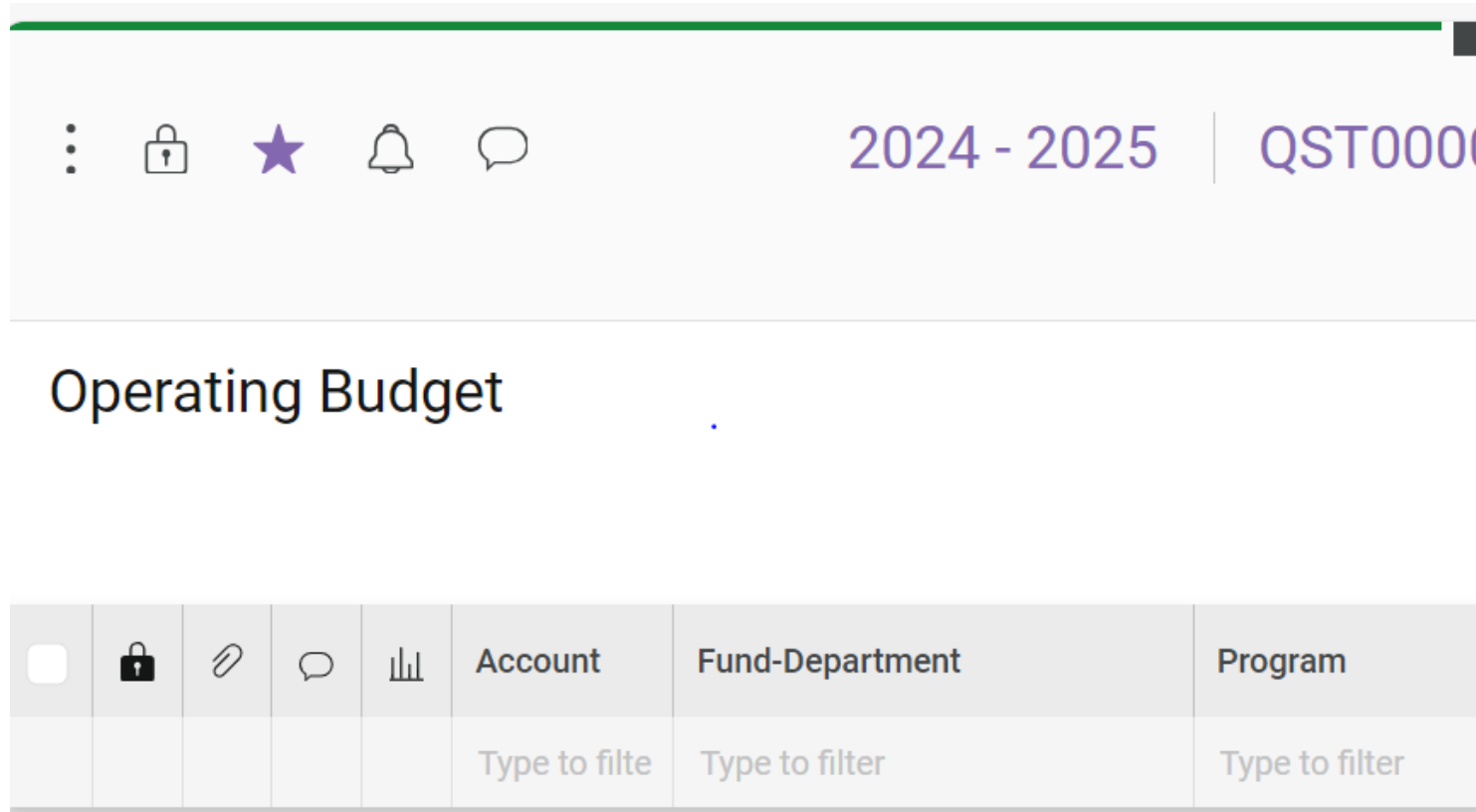
OE Budget Transfer User Interface

- **Budget Transfer Operating Budget Screen**
 - Select the Green + sign to begin entering the transfer
 - Select the Star Icon to add this to your Favorites

The screenshot displays a web browser window with the URL https://csucpptest.questica.com/changerequest_budget.aspx?Load=true&ID=228. The page title is "1-PROPOSED TRANSFER". The breadcrumb navigation shows "2024 - 2025 | QST0000209 - Testing Library 55800 | Main (Active) ▾". Below this, there are tabs for "General ▾" and "Operating ▾". The main heading is "Operating Budget". On the right side, there are several dropdown menus: "Annual ▾", "1 YR ▾", "2024 ▾", and "0.00 ▾". To the right of these is a green "+" icon labeled "Add" and a "Value Bar" icon. At the bottom, there is a table with the following columns: Account, Fund-Department, Program, Class, Budget Scenario, Document Line Description, Ledger Group, and 2024. The table is currently empty.

OE Budget Transfer User Interface

- **Budget Transfer Operating Budget Screen**
 - Select the Star to add to your Favorites/Bookmark



OE Budget Transfer User Interface

- **Questica Home Screen**
 - Select the Star to access Bookmarks

The screenshot displays the Questica Home Screen. At the top left is the logo and version information: "csucpp 2023.1.0.18". The navigation menu includes "Dashboard", "My Tasks", "Budgeting", "Reports", and "Administration". A search bar in the center contains the text "Search Anything [CTRL + SPACE]". On the right, there are icons for help, refresh, calendar, star (bookmarks), and a notification bell with a red "10" badge. A user profile picture is also visible.

A "Bookmarks" dropdown menu is open, listing the following items:

- Change Requests
 - Change Request | 2023 | QST0000008 - PBA Perm BP&A Redistribution (Published)
 - Change Request | 2024 | QST0000196 - BT 04 OoP 73700 to Various 1576
- Reporting
 - Smart Report | BPA PBA Review
 - Smart Report | PBA Position Budget Details dcc
 - Smart Report | Position Budget Details dcc

Below the search bar, there is a "BP&A" dropdown menu. Underneath, a table titled "BPA PBA Form Review" is displayed with the following data:

Budget Year	Position No	Annual Budget	Account	Fund	CFS De
2024 - 2025	00000001	58,596.00	601300	POCMP - TW001	73500
2024 - 2025	00000002	32,778.00	601300	POCMP - TW002	63100

OE Budget Transfer User Interface

- **Budget Transfer Operating Budget Screen**
 - Input all fields shown on Grid
 - Column heading 2024 is the Dollar Amount field
 - Document Line Description is limited to 30 characters.

PROPOSED TRANSFER

⋮ 🔒 ☆ 🔔 💬
2024 - 2025 | QST0000219 - BT 02 ADM 96200 from DM078 to DM050 | Main (Active) ▾
Promote

General ▾ • Operating ▾ Capital ▾ Reports ▾

Operating Budget

Annual ▾ 1 YR ▾ 2024 ▾ 0.00 ▾
+ 📏 🔍
📄 📥 📤

	Account	Fund-Department	Program	Class	Project	Budget Scenario	Document Line Description	Ledger Group	2024
	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"/>	607002 - Acquisit...	POCMP - EDE17 - 96...	0706 - Maj...	C2204 - CEOP E...		ADJUSTMENT - AD...	transfer to DM050	STD_BUDGET - S...	(50,000.00)
<input type="checkbox"/>	607022 - Capital...	POCMP - EDE17 - 96...	0706 - Maj...	C2204 - CEOP E...		ADJUSTMENT - AD...	transfer from DM078	STD_BUDGET - S...	50,000.00

OE Budget Transfer User Interface

- **Export and Import Spreadsheet Option**

- **Export Grid Lines from Qestica to Update in Excel using the Export Feature**
- **Import Updated Excel file into Qestica**



1-PROPOSED TRANSFER

2024 - 2025 | QST0000220 - BT 04 ADM 96200 from DM078 to DM050 | Main (Active) Promote

General Operating Capital Reports

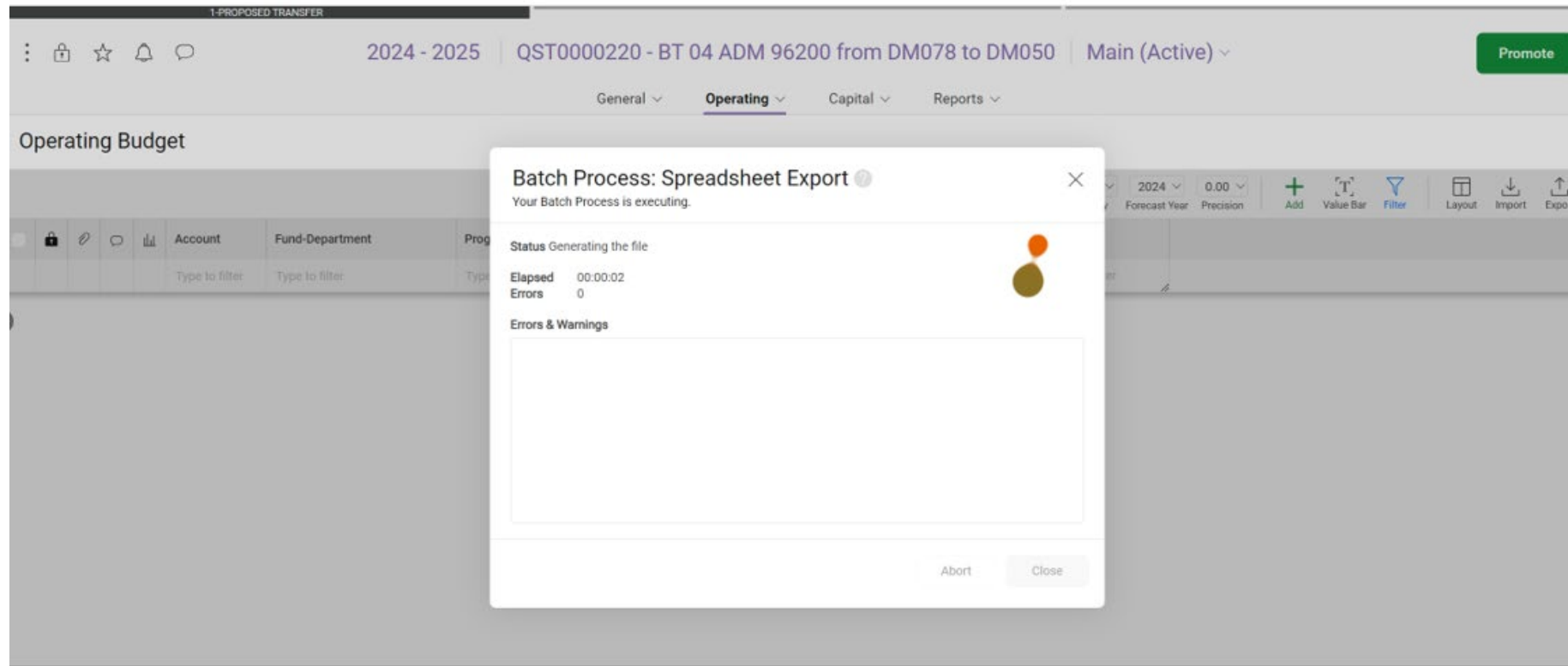
Operating Budget

Annual Grid View | 1 YR Display | 2024 Forecast Year | 0.00 Precision | + Add | Value Bar | Filter | Layout | Import | Export

Account	Fund-Department	Progr...	Class	Budget Sc...	Document Line Descr...	Ledger Group	2024
Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter

OE Budget Transfer User Interface

- **Export Operating Budget Grid**



OE Budget Transfer User Interface

[questica import export excel spreadsheets tips.pdf](#)

- Retrieve the exported file from your Download Folder

	B	C	D	E	F	G	H	I	J
1									
2	Account *	Fund-Department *	Program	Class	Budget Scenario *	Document Line Descript	Ledger Group	2024	2025
3								-	-
4	Data below this row will not be imported.								
5									
6									
7									

OE Budget Transfer User Interface

- Except for Columns G & I from the exported file, all other columns will have drop down boxes.
- Fill in all Columns except for column 2025
- Columns 2024 & 2025 are dollar amount fields

	B	C	D	E	F	G	H	I	J
1									
2	Account *	Fund-Department *	Program	Class	Budget Scenario *	Document Line Descript	Ledger Group	2024	2025
3								-	-
4	<input type="text"/>								
5									
6	Data below this row will not be imported.								
7									

	B	C	D	E	F	G	H	I
1								
2	Account *	Fund-Department *	Program	Class	Budget Scenario *	Document Line Descript	Ledger Group	2024
3	6070	<input type="text"/>						-
4	607002	<input type="text"/>						
5	607008							
6	607009	Data below this row will not be imported.						
7	607010							
8	607011							
9	607022							
10	607031							
11	607032							
12	607033							
13	607034							
14	607041							
15	607042							

OE Budget Transfer User Interface

- Reformat column I to Number with the negative sign “-” instead of ()
- Ensure the Use 1000 Separator is checked

The screenshot shows an Excel spreadsheet with columns B through N. The data is as follows:

Account *	Fund-Department *	Program	Class	Budget Scenario *	Document Line Descript	Ledger Group	2024	2025
607002	POCMP - EDE17 - 96000	0706	C2204	ADJUSTMENT	transfer to DM050	STD_BUDGET	(50,000.00)	-
607022	POCMP - EDE17 - 96200	0706	C2204	ADJUSTMENT	transfer from DM078	STD_BUDGET	50,000.00	

Row 6 contains the text: "Data below this row will not be imported."

The 'Format Cells' dialog box is open, showing the 'Number' category selected. The 'Sample' field displays '-50,000.00'. The 'Decimal places' are set to 2. The 'Use 1000 Separator (,)' checkbox is checked. The 'Negative numbers' list shows '-1,234.10' selected, with other options including '1,234.10', '(1,234.10)', and '(1,234.10)'. The dialog also includes 'OK' and 'Cancel' buttons.

OE Budget Transfer User Interface

- **Run Data Validation in the Export File (Excel) once the Export File has been Completed.**
 - Go to the “Data” Ribbon in Excel > Data Tools Section > Data Validation
 - Select Circle Invalid Data

The screenshot displays the Microsoft Excel interface with the 'Data' ribbon selected. The ribbon includes sections for 'Get & Transform Data', 'Queries & Connections', 'Data Types', 'Sort & Filter', and 'Data Tools'. The 'Data Validation' button in the 'Data Tools' section is highlighted in yellow. Below the ribbon, three data tables are shown, representing the state of an Excel file before and after data validation.

Account *	Fund-Department *	Program	Class	Project	Document Line Descript	Budget Scenario *	Ledger Group	2024
607002	POCMP - EDE17 - 96000	0706	C2204	DM078	transfer to DM050	ADJUSTMENT	STD_BUDGET	-50000.00
607022	POCMP - EDE17 - 96200	0760	C2204	DM050	transfer from DM078	ADJUSTMENT	STD_BUDGET	50000.00
Data below this row will not be imported.								

Account *	Fund-Department *	Program	Class	Project	Document Line Descript	Budget Scenario *	Ledger Group	2024
607002	POCMP - EDE17 - 96000	0706	C2204	DM078	transfer to DM050	ADJUSTMENT	STD_BUDGET	-50000.00
607022	POCMP - EDE17 - 96200	0760	C2204	DM050	transfer from DM078	ADJUSTMENT	STD_BUDGET	50000.00
Data below this row will not be imported.								

Account *	Fund-Department *	Program	Class	Project	Document Line Descript	Budget Scenario *	Ledger Group	2024
607002	POCMP - EDE17 - 96000	0706	C2204	DM078	transfer to DM050	ADJUSTMENT	STD_BUDGET	-50000.00
607022	POCMP - EDE17 - 96200	0706	C2204	DM050	transfer from DM078	ADJUSTMENT	STD_BUDGET	50000.00
Data below this row will not be imported.								

- **Make Corrections and Save Completed File in your Documents.**

OE Budget Transfer User Interface

- Close the File prior to importing back into Questica.
- Go back into the same screen you exported from Questica and Select the Import Feature

csucpptest.questica.com/changerequest_budget.aspx?Load=true&ID=239

1-PROPOSED TRANSFER

2024 - 2025 | QST0000220 - BT 04 ADM 96200 from DM078 to DM050 | Main (Active) Promote

General Operating Capital Reports

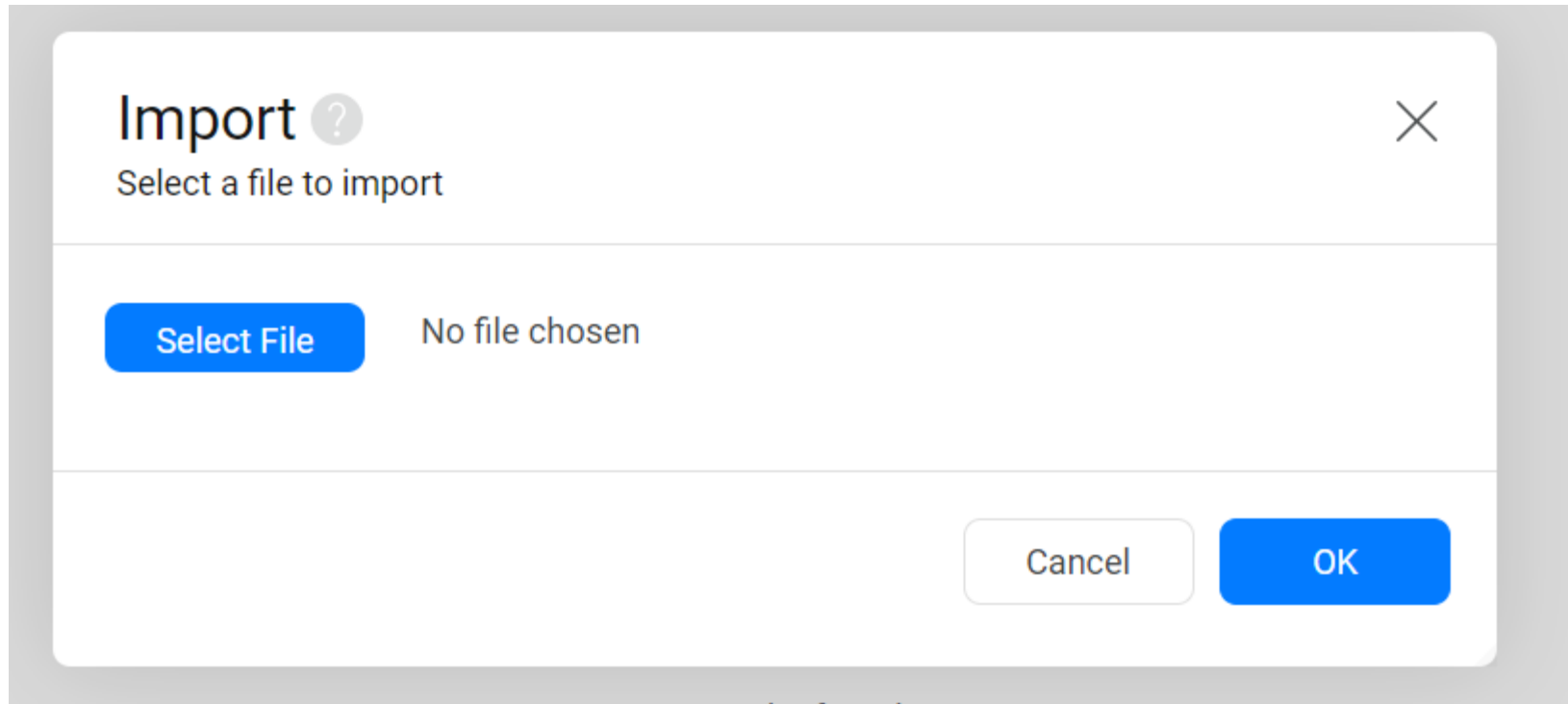
Operating Budget

Account	Fund-Department	Progr...	Class	Budget Sc...	Document Line Descr...	Ledger Group	2024
Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter

Annual Grid View | 1 YR Display | 2024 Forecast Year | 0.00 Precision | Add Value Bar Filter | Layout Import Export

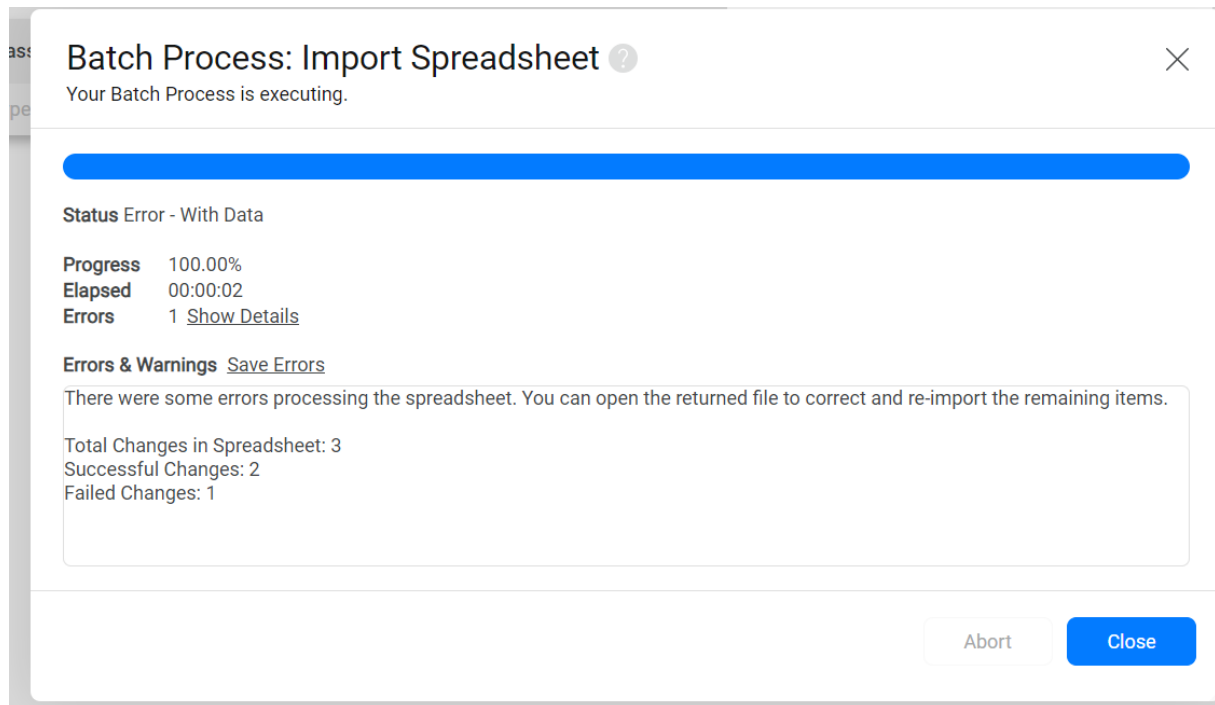
OE Budget Transfer User Interface

- A pop-up screen will appear
- Select the File to import and select OK



OE Budget Transfer User Interface

- A pop-up screen will appear once the import is complete.
- The screen is stating 2 records updated while one failed.
- Select the Show Details screen to see what failed.
- Select the Save Errors link to download the errors to forward to the BP&A team for research if needed.
 - eMail to budget@cpp.edu



OE Budget Transfer User Interface

- The error is stating it is in row 5 of the spreadsheet.
- Row 5 was a blank row. This does not affect the change request; it is recommended to delete any blank rows before saving and importing the file into Questica.

Batch Process Results ?

The following results occurred during execution of the batch process

Process	Import Spreadsheet	Start Time	Oct 23, 2024 1:25:14 PM (PDT)
Status	Error - With Data	Finish Time	Oct 23, 2024 1:25:17 PM (PDT)
Operations	3	Elapsed Time	00:00:02

Failures: 1 Successes: 2 Unprocessed: 0

- Failure: Error on Row 5: Object reference not set to an instance of an object. ([Details](#))

	B	C	D	E	F	G	H	I	
1									
2	Account *	Fund-Department *	Program	Class	Budget Scenario *	Document Line Descrip	Ledger Group	2024	202
3	607002	POCMP - EDE17 - 96000	0706	C2204	ADJUSTMENT	transfer to DM050	STD_BUDGET	-50,000.00	
4	607022	POCMP - EDE17 - 96200	0706	C2204	ADJUSTMENT	transfer from DM078	STD_BUDGET	50,000.00	
5									
6	Data below this row will not be imported.								
7									

OE Budget Transfer User Interface

- Select the Green Promote button on the upper right-hand side of the screen.
- This action will send the Budget Transfer over to the respective Budget Analyst for review.

1-PROPOSED TRANSFER

2024 - 2025 | QST0000220 - BT 04 ADM 96200 from DM078 to DM050 | Main (Active) Promote

General ▾ Operating ▾ Capital ▾ Reports ▾

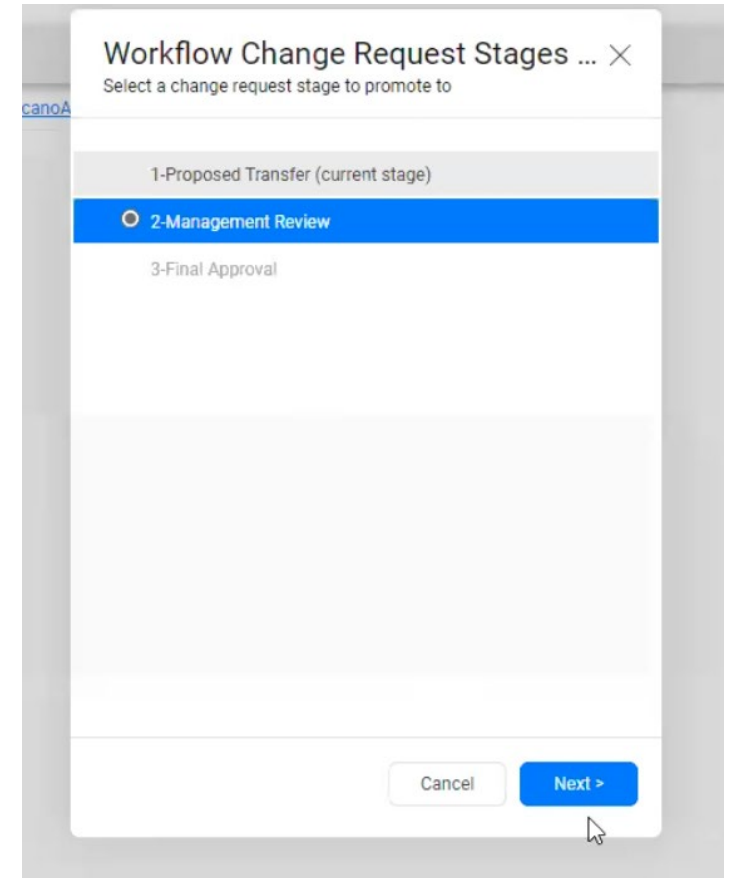
Operating Budget

Annual ▾ | 1 YR ▾ | 2024 ▾ | 0.00 ▾ | + Add | [T] Value Bar | Filter | Layout | Import | Export

	Account	Fund-Department	Progr...	Class	Budget Sc...	Document Line Descr...	Ledger Group	2024
	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"/>	607002 - Acq...	POCMP - EDE17 - 96000 - SRB...	0706 - M...	C2204 - CEOP...	ADJUSTMEN...	transfer to DM050	STD_BUDGET - STD_...	(50,000.00)
<input type="checkbox"/>	607022 - Capi...	POCMP - EDE17 - 96200 - SRB...	0706 - M...	C2204 - CEOP...	ADJUSTMEN...	transfer from DM078	STD_BUDGET - STD_...	50,000.00

OE Budget Transfer User Interface

- **When Promote is selected a pop-up screen will appear.**
- **Select option 2-Management Review and select the Next button.**
- **Selecting option 2 forwards the request to BP&A for review & approval.**



OE Budget Transfer User Interface

- A second pop-up box will appear to allow for input of comments (Current Date Required).
- Enter date of promotion & comments into the pink highlighted section.
- Press the Save button to Finalize.

Notes ?

Flagged notes and notes that were added in the current stage

No Notes

Enter promote comment here

Cancel < Previous Save

OE Budget Transfer User Interface

- Comments entered in the Notes section will appear in the Purple Comments Bubble

⋮ 🔒 ☆ 🔔 💬 2024 - 2025 QST0000196 - BT 04 OoP 73700 to Various 1576 Main (Active) ▾													
General ▾ Operating ▾ Capital ▾ Reports ▾													
Operating Budget													
<input type="checkbox"/>	🔒	🔗	💬	📊	Account	Fund-Department	Program	Class	Project	Document Line Description	Budget Sc...	Ledger Group	2024
					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"/>		🔗	💬	📊	660003 - ...	POCMP - POM01 - 73700 - OP...	0601 - Executive Management	C3458 - WELCOME CENTER		from 73700 to 48300	ADJUSTMEN...	STD_BUDGET - STD_...	(24,800.00)
<input type="checkbox"/>		🔗	💬	📊	601810 - ...	POCMP - POM01 - 48300 - OP...	0406 - Academic Administration	00000 - NO CLASS VALUE		Transfer from 660003-73700	ADJUSTMEN...	STD_BUDGET - STD_...	5,000.00
<input type="checkbox"/>		🔗	💬	📊	601303 - ...	POCMP - POM01 - 48300 - OP...	0406 - Academic Administration	00000 - NO CLASS VALUE		Transfer from 660003-73700	ADJUSTMEN...	STD_BUDGET - STD_...	19,800.00
<input type="checkbox"/>		🔗	💬	📊	660003 - ...	POCMP - POM01 - 73700 - OP...	0601 - Executive Management	00000 - NO CLASS VALUE		Transfer to 660003-61600	ADJUSTMEN...	STD_BUDGET - STD_...	(5,237.00)
<input type="checkbox"/>		🔗	💬	📊	660003 - ...	POCMP - POM01 - 61600 - OP...	0501 - Student Services Admin	00000 - NO CLASS VALUE		Transfer from 660003-73700	ADJUSTMEN...	STD_BUDGET - STD_...	5,237.00
<input type="checkbox"/>		🔗	💬	📊	660003 - ...	POCMP - POM01 - 73900 - OP...	0601 - Executive Management	C3469 - BLACK STUDENT SUCCESS		Transfer to 660003-65100	ADJUSTMEN...	STD_BUDGET - STD_...	(88,174.00)
<input type="checkbox"/>		🔗	💬	📊	606001 - ...	POCMP - POM01 - 73900 - OP...	0601 - Executive Management	C3469 - BLACK STUDENT SUCCESS		Transfer to 660003-65100	ADJUSTMEN...	STD_BUDGET - STD_...	(363.00)
<input type="checkbox"/>		🔗	💬	📊	660003 - ...	POCMP - POM01 - 61500 - OP...	0601 - Executive Management	C3469 - BLACK STUDENT SUCCESS		Transfer from Various-73900	ADJUSTMEN...	STD_BUDGET - STD_...	88,537.00

OE Budget Transfer User Interface

- Select the Purple Comments Bubble to view the Comments.

The screenshot displays a web browser window with multiple tabs open, including Timesheet, Mail, OOP_Transfers, Launch Meeting, IFTRrequest, Budget Service, IFT_Q4_Smarts, Finance: Custom, and ChatGPT. The active tab is csucpp.questica.com/changerequest_documents.aspx?Load=true&ID=216. The page title is "2-MANAGEMENT REVIEW". The main content area shows a document titled "2024 - 2025 | QST0000196 - BT 04 OoP 73700 to Various 1576 | Main (Active)". Below the title, there are tabs for "Change Request" and "Scenario: Main". The "Change Request" tab is active, showing a list of comments. The first comment is from Debra Chavez, dated 23 minutes ago, with the text "HI sorry demoted". The second comment is from Me, dated 18 minutes ago, with the text "Hi". The third comment is from Debra Chavez, dated 15 minutes ago, with the text "demoted". Below the comments, there is a "Resource" section with two links: "OOP_Transfers_202410(1).xlsx" and "OOP_Transfers_202410_backup_(PDF).pdf".

OE Budget Transfer Workflow Process

- Change Request Stages
 - 1- Proposed Transfer (input stage)
 - 2- BP&A 1st Review
 - 3- Final Approval: Pending Publishing

Workflow Change Request Stages ... ✕

Select a change request stage to promote to

1-Proposed Transfer (current stage)

2-Management Review

3-Final Approval

OE Budget Transfer Workflow Process

[Questica Campus User Budget Transfer Process Map.pdf](#)

- **BP&A Receives, Reviews and Promotes or Demotes the BT.**
- **Promotion moves to Publishing**
 - Requestor will receive an **email** from Questica that a **modification** has been made to the Budget Transfer submission.
 - Log into Questica for updates
 - Bookmarks- Star Icon
 - Change Request Home Screen
 - Purple Comments Bubble
 - Change Request Menu option : General > History
 - Once published in Questica, the request will post in CFS before or on the 3rd business day from the date the request was promoted by the requestor.
 - **Publish Date** in Questica is noted on **Change Request Home Screen**

OE Budget Transfer Workflow Process

[Questica Campus User Budget Transfer Process Map.pdf](#)

- **BP&A Receives, Reviews and Promotes or Demotes the BT.**
 - **Demotion moves the request back to Stage 1-Proposed Transfer (initial input)**
 - Requestor will receive an **email** from Questica that a **modification** has been made to the Budget Transfer submission.
 - Log into Questica for updates
 - Bookmarks- Star Icon
 - Change Request Home Screen
 - Purple Comments Bubble
 - Change Request Menu option : General > History
 - If demoted, the requestor can make edits to the original budget transfer directly in the Change Request Screen or revise the information using the Import/Export feature and re-submit by selecting the Promote button again.
 - Once published in Questica, the request will post in CFS before or on the 3rd business day from the date the request was **re-promoted** by the requestor.
 - **Publish Date** in Questica is noted on **Change Request Home Screen**

OE Budget Transfer Workflow Process

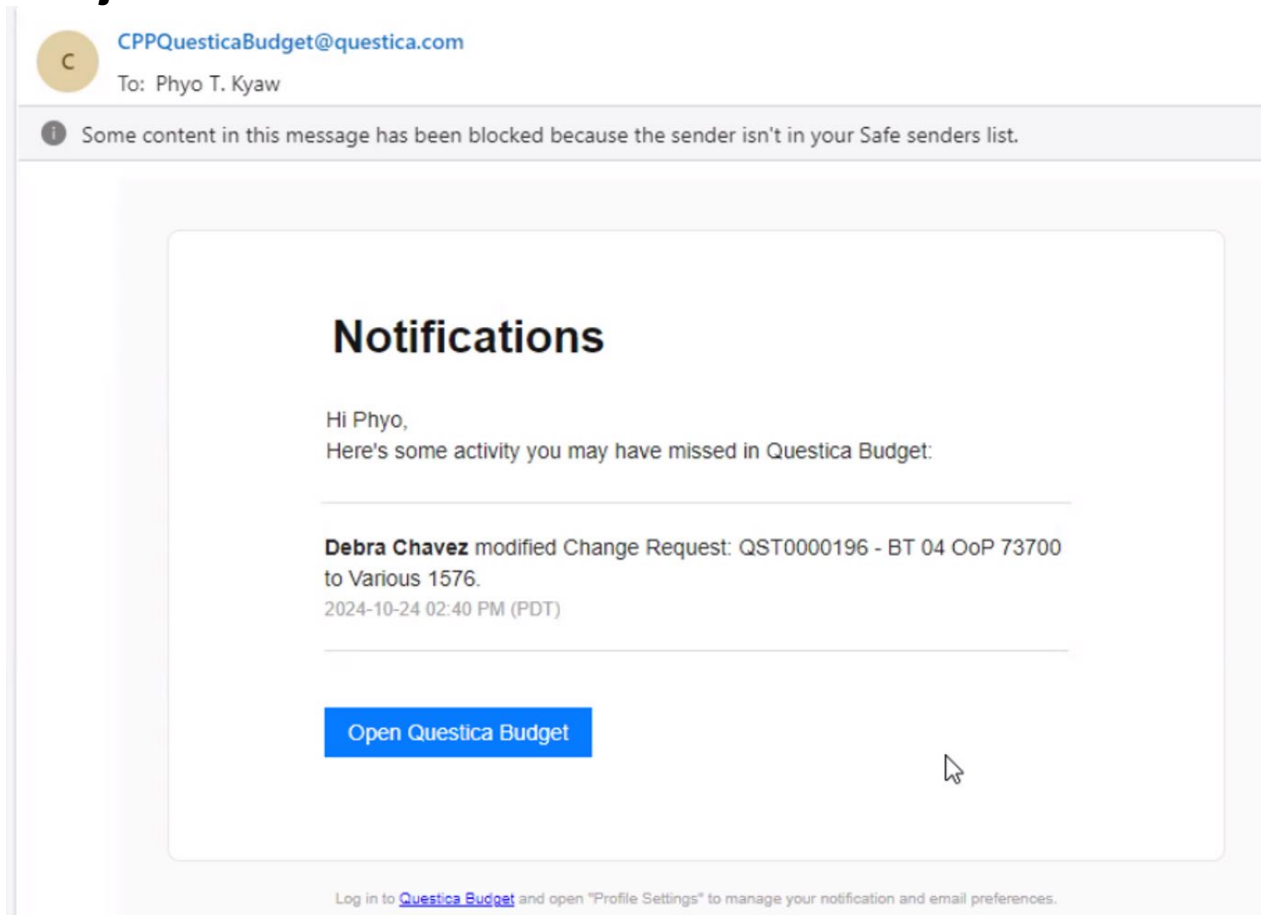
Change Request Home Screen Publish Date Field

The screenshot displays the 'Change Requests' home screen for the 2024-2025 fiscal year. The interface includes a navigation menu at the top with 'Budgeting' selected, a search bar, and various utility icons. Below the search bar, there are filters for 'All Change Request Types' and 'Any Status'. The main content is a table of budget transfer requests.

<input type="checkbox"/>		Budget Ye...	Change R...	Journal Lin... ↓	Journal Line (Title)	Brief Description	Change Request Stage	Export Batch Number	A...	Publish Date
<input type="checkbox"/>		2024 - 2025	Budget Trans...	QST0000199	BT - 04 - ITIP - 34000 - Post Budget Load Adj		1-Proposed Transfer [Budget Tr...			
<input type="checkbox"/>		2024 - 2025	Position Bud...	QST0000198	PBA - 04 - PRES - POM01 - 73700 - Budget Upload Adj	Corrections to positions based upo...	1-Proposed Transfer [Position ...			
<input type="checkbox"/>		2024 - 2025	Budget Trans...	QST0000197	BT - 04 - UNIV - POM01 - AO #24-019 Correction	Signs reversed in the original submi...	2-BP&A Review [Budget Transfer]			
<input type="checkbox"/>		2024 - 2025	Budget Trans...	QST0000196	BT 04 OoP 73700 to Various 1576		3-Final Approval [Budget Transf...			
<input type="checkbox"/>		2024 - 2025	Position Bud...	QST0000194	PBA 04 OoP 4843 5736 to 1225		3-Final Approval [Position Budg...			
<input type="checkbox"/>		2024 - 2025	One-Sided: B...	QST0000193	BT - 04 - ADM - PCRxx - 72010 - Cost Recovery Allocations	Cost recovery allocations.	3-Final Approval [One-Sided: Bu...	XBA20241024232853		2024-10-24 2:43:39 PM
<input type="checkbox"/>		2024 - 2025	Budget Trans...	QST0000192	BT - 04 - ACA - POM01 - 20800 - Re-Distribute Budget	Re-distribute budget to student assi...	2-BP&A Review [Budget Transfer]			
<input type="checkbox"/>		2024 - 2025	Budget Trans...	QST0000190	BT - 04 - ACA - POM01 - 16900 - Rubric Scoring Event	Rubric Scoring Event	3-Final Approval [Budget Transf...	XBA20241023225529		2024-10-22 6:49:52 PM
<input type="checkbox"/>		2024 - 2025	Budget Trans...	QST0000188	BT - 04 - ACA - POM01 - 16900 - STS AI Support 24-25 AY	STS AI Support	3-Final Approval [Budget Transf...	XBA20241023225529		2024-10-22 6:46:18 PM
<input type="checkbox"/>		2024 - 2025	Budget Trans...	QST0000187	BT - 04 - ACA - POM01 - 16910 - Cafe & Andre G. Sy with...	Cafe & Andre G. Sy Allocation	3-Final Approval [Budget Transf...	XBA20241023225529		2024-10-22 6:47:01 PM
<input type="checkbox"/>		2024 - 2025	Budget Trans...	QST0000186	BT - 04 - ACA - POM01 - 16900 - Fall 2024 6 WTU Writing I...	WTU Writing in the Disciplines	2-BP&A Review [Budget Transfer]			

OE Budget Transfer Email Notification

- Email Notification from Questica
- Sender of Email : CPPQuesticaBudget@questica.com
- Subject Line of Email : Questica Notifications



OE Budget Transfer Workflow Notifications

- **Location of Qwestica Workflow Notifications**

- Star Icon on Qwestica Home Page –
 - Select the appropriate Change Request to view the Change Request screen with Comments

The screenshot shows the Qwestica dashboard interface. At the top left is the CSUCPP logo and version information (2023.1.0.18). The navigation menu includes Dashboard, My Tasks, Budgeting, Reports, and Administration. A search bar is prominently displayed with the text "Search Anything [CTRL + SPACE]". A "Bookmarks" dropdown menu is open, listing items under "Change Requests" and "Reporting". Below the search bar, there is a "BP&A" dropdown and a table titled "BPA PBA Form Review".

Budget Year	Position No	Annual Budget	Account	Fund	CFS De
2024 - 2025	00000001	58,596.00	601300	POCMP - TW001	73500
2024 - 2025	00000002	27,778.00	601300	POCMP - TW002	63100

OE Budget Transfer Workflow Notifications

- Location of Questica Workflow Notifications
 - Bell Icon on Questica Home Page –
 - Lists Modified Change Requests

The screenshot displays the Questica Budgeting interface. At the top, there is a navigation bar with the Questica logo, version information (csucpp 2023.1.0.18), and menu items: Dashboard, My Tasks, Budgeting (selected), Reports, Administration, and a search icon. A user profile for Debra Chavez is visible in the top right corner.

The main content area is titled "Change Requests | 2024 - 2025" and includes a search bar for "Change Requests". Below the search bar are filters for "All Change Request Types" and "Any Status".

A table of change requests is shown with the following columns: Budget Year, Change Request, Journal Line, Journal Line (Title), Brief Description, and Character. The table contains several rows, with the first row highlighted:

Budget Year	Change Request	Journal Line	Journal Line (Title)	Brief Description	Character
2024 - 2025	Budget Trans...	QST0000196	BT 04 OoP 73700 to Various 1576		3-Fin
2024 - 2025	Position Bud...	QST0000194	PBA 04 OoP 4843 5736 to 1225		2-Ma
2024 - 2025	One-Sided: B...	QST0000193	BT - 04 - ADM - PCRxx - 72010 - Cost Recovery Allocations	Cost recovery allocations.	3-Fin
2024 - 2025	Budget Trans...	QST0000192	BT - 04 - ACA - POM01 - 20800 - Re-Distribute Budget	Re-distribute budget to student assi...	2-Ma
2024 - 2025	Budget Trans...	QST0000190	BT - 04 - ACA - POM01 - 16900 - Rubric Scoring Event	Rubric Scoring Event	3-Fin
2024 - 2025	Budget Trans...	QST0000188	BT - 04 - ACA - POM01 - 16900 - STS AI Support 24-25 AY	STS AI Support	3-Fin
2024 - 2025	Budget Trans...	QST0000187	BT - 04 - ACA - POM01 - 16910 - Cafe & Andre G. Sy with...	Cafe & Andre G. Sy Allocation	3-Fin
2024 - 2025	Budget Trans...	QST0000186	BT - 04 - ACA - POM01 - 16900 - Fall 2024 6 WTU Writing i...	WTU Writing in the Disciplines	2-Ma

A notifications dropdown menu is open on the right side of the interface, showing a list of notifications:

- AL Anne-Marie Larrabure modified Change Request: QST0000193 - BT - 04 - ADM - PCRxx - 72010 - Cost Recovery Allocations. 3 days ago
- PK Phyo Kyaw modified Change Request: QST0000196 - BT 04 OoP 73700 to Various 1576. 3 days ago
- PK Phyo Kyaw created Change Request: QST0000195 - BT 04 OoP 73700 to Various 1576. 3 days ago
- AL Anne-Marie Larrabure modified Change Request: QST0000180 - BT - 03 - ADM - PDM01 - 96200 - Allocate Funding for CPP Letters Removal. 5 days ago
- AL Anne-Marie Larrabure modified Change Request: QST0000190 - BT - 04 - ACA - POM01 - 16900 - Rubric Scoring Event. 5 days ago
- AL Anne-Marie Larrabure modified Change Request: QST0000190 - BT - 04 - ACA - POM01 - 16900 - Rubric Scoring Event. 5 days ago
- AL Anne-Marie Larrabure modified Change Request: QST0000190 - BT - 04 - ACA - POM01 - 16900 - Rubric Scoring Event. 5 days ago

OE Budget Transfer Workflow Notifications

- **Location of Questica Workflow Notifications**

- Change Request Home Screen –
 - Budgeting > Change Requests > Change Requests
- Change Request Stage
 - 1- Proposed Transfer (input stage)
 - 2- Budget Dept Review
 - 3- Final Approval : Pending Publishing

	Budget Ye...	Change R...	Journal Lin...	Journal Line (Title)	Brief Description	Change Request Stage	Export Batch Number	A...	Publish Date
	2024 - 2025	Budget Trans...	QST0000199	BT - 04 - ITIP - 34000 - Post Budget Load Adj		1-Proposed Transfer [Budget Tr...			
	2024 - 2025	Position Bud...	QST0000198	PBA - 04 - PRES - POM01 - 73700 - Budget Upload Adj	Corrections to positions based upo...	1-Proposed Transfer [Position ...			
	2024 - 2025	Budget Trans...	QST0000197	BT - 04 - UNIV - POM01 - AO #24-019 Correction	Signs reversed in the original submi...	2-BP&A Review [Budget Transfer]			
	2024 - 2025	Budget Trans...	QST0000196	BT 04 OoP 73700 to Various 1576		3-Final Approval [Budget Transf...			
	2024 - 2025	Position Bud...	QST0000194	PBA 04 OoP 4843 5736 to 1225		3-Final Approval [Position Budg...			
	2024 - 2025	One-Sided: B...	QST0000193	BT - 04 - ADM - PCRxx - 72010 - Cost Recovery Allocations	Cost recovery allocations.	3-Final Approval [One-Sided: Bu...	XBA20241024232853		2024-10-24 2:43:39 PM
	2024 - 2025	Budget Trans...	QST0000192	BT - 04 - ACA - POM01 - 20800 - Re-Distribute Budget	Re-distribute budget to student assi...	2-BP&A Review [Budget Transfer]			
	2024 - 2025	Budget Trans...	QST0000190	BT - 04 - ACA - POM01 - 16900 - Rubric Scoring Event	Rubric Scoring Event	3-Final Approval [Budget Transf...	XBA20241023225529		2024-10-22 6:49:52 PM
	2024 - 2025	Budget Trans...	QST0000188	BT - 04 - ACA - POM01 - 16900 - STS AI Support 24-25 AY	STS AI Support	3-Final Approval [Budget Transf...	XBA20241023225529		2024-10-22 6:46:18 PM
	2024 - 2025	Budget Trans...	QST0000187	BT - 04 - ACA - POM01 - 16910 - Cafe & Andre G. Sy with ...	Cafe & Andre G. Sy Allocation	3-Final Approval [Budget Transf...	XBA20241023225529		2024-10-22 6:47:01 PM
	2024 - 2025	Budget Trans...	QST0000186	BT - 04 - ACA - POM01 - 16900 - Fall 2024 6 WTU Writing i...	WTU Writing in the Disciplines	2-BP&A Review [Budget Transfer]			

OE Budget Transfer Workflow Notifications

- **Location of Questica Workflow Notifications**

- Change Request Home Page –

- Select the link in blue under the Journal Line (Title) column to access the Change Request Operating Budget screen shown below

- Select the Purple Comments Bubble to view the Notes/Comments/Updates

The screenshot shows the 'Change Requests' page for the 2024-2025 fiscal year. The interface includes a search bar, filters for request types and status, and a table of requests. The table columns are: Budget Year, Change Re..., Journal Line Ref (ex: ALB18-001), Journal Line (Title), Brief Description, Change Request Stage, and Export Batch Number. The selected request is 'BT 04 OoP 73700 to Various 1576'.

Budget Year	Change Re...	Journal Line Ref (ex: ALB18-001)	Journal Line (Title)	Brief Description	Change Request Stage	Export Batch Number
2024 - 2025	Budget Transf...	QST0000196	BT 04 OoP 73700 to Various 1576		1-Proposed Transfer [Budget Tra...	
2024 - 2025	Position Budg...	QST0000194	PBA 04 OoP 4843 5736 to 1225		1-Proposed Transfer [Position Bu...	
2024 - 2025	One-Sided: Bu...	QST0000193	BT -04 - ADM - PCRxx - 72010 - Cost Recovery Allocations	Cost recovery allocations.	3-Final Approval [One-Sided: Bud...	
2024 - 2025	Budget Transf...	QST0000192	BT -04 - ACA - POM01 - 20800 - Re-Distribute Budget	Re-distribute budget to student assis...	2-Management Review [Budget T...	
2024 - 2025	Budget Transf...	QST0000190	BT -04 - ACA - POM01 - 16900 - Rubric Scoring Event	Rubric Scoring Event	3-Final Approval [Budget Transfer]	XBA20241023225529
2024 - 2025	Budget Transf...	QST0000188	BT -04 - ACA - POM01 - 16900 - STS AI Support 24-25 AY	STS AI Support	3-Final Approval [Budget Transfer]	XBA20241023225529
2024 - 2025	Budget Transf...	QST0000187	BT -04 - ACA - POM01 - 16910 - Cafe & Andre G. Sy with CA...	Cafe & Andre G. Sy Allocation	3-Final Approval [Budget Transfer]	XBA20241023225529

The screenshot shows the 'Operating Budget' screen for the selected request. It displays a table of budget lines with columns: Account, Fund-Department, Program, Class, Project, Document Line Description, Budget Sc..., Ledger Group, and 2024. The table shows various budget transfers and their amounts.

Account	Fund-Department	Program	Class	Project	Document Line Description	Budget Sc...	Ledger Group	2024
660003 - ...	POCMP - POM01 - 73700 - OP...	0601 - Executive Management	C3458 - WELCOME CENTER	0601 - Executive Management	from 73700 to 48300	ADJUSTMEN...	STD_BUDGET - STD...	(24,8
601810 - ...	POCMP - POM01 - 48300 - OP...	0406 - Academic Administration	00000 - NO CLASS VALUE		Transfer from 660003-73700	ADJUSTMEN...	STD_BUDGET - STD...	5,
601303 - ...	POCMP - POM01 - 48300 - OP...	0406 - Academic Administration	00000 - NO CLASS VALUE		Transfer from 660003-73700	ADJUSTMEN...	STD_BUDGET - STD...	19,
660003 - ...	POCMP - POM01 - 73700 - OP...	0601 - Executive Management	00000 - NO CLASS VALUE		Transfer to 660003-61600	ADJUSTMEN...	STD_BUDGET - STD...	(5,2
660003 - ...	POCMP - POM01 - 61600 - OP...	0501 - Student Services Admin	00000 - NO CLASS VALUE		Transfer from 660003-73700	ADJUSTMEN...	STD_BUDGET - STD...	5,
660003 - ...	POCMP - POM01 - 73900 - OP...	0601 - Executive Management	C3469 - BLACK STUDENT SUCCESS		Transfer to 660003-65100	ADJUSTMEN...	STD_BUDGET - STD...	(88,1
606001 - ...	POCMP - POM01 - 73900 - OP...	0601 - Executive Management	C3469 - BLACK STUDENT SUCCESS		Transfer to 660003-65100	ADJUSTMEN...	STD_BUDGET - STD...	(363.00)
660003 - ...	POCMP - POM01 - 61500 - OP...	0601 - Executive Management	C3469 - BLACK STUDENT SUCCESS		Transfer from Various-73900	ADJUSTMEN...	STD_BUDGET - STD...	88,537.00

The screenshot shows the 'Notes' section for the selected request. It displays a list of notifications with columns: Change Request, Scenario, and Admin. The notifications include:

- Demoted from 2-Management Review [Budget Transfer] to 1-Proposed Transfer [Budget Transfer]** by @ptkyaw@cpp.edu - HI sorry demoted (1 hour ago)
- Promoted from 1-Proposed Transfer [Budget Transfer] to 2-Management Review [Budget Transfer]** by Phyoy Kyaw (1 hour ago)
- Demoted from 2-Management Review [Budget Transfer] to 1-Proposed Transfer [Budget Transfer]** by @ptkyaw@cpp.edu demoted (1 hour ago)

OE Budget Transfer Workflow Notifications

- Location of Questica Workflow Notifications
 - Change Request Screen – General > History
 - Select the link in blue under the Journal Line (Title) column to access the Change Request
 - Select General > History to access the Log

The screenshot displays the Questica system interface. At the top, there is a navigation bar with tabs for Dashboard, My Tasks, Budgeting (selected), Reports, and Administration. A search bar and user profile (Debra Chavez) are also visible. Below the navigation bar, the 'Change Requests' section is active for the 2024-2025 period. A table lists various change requests with columns for Budget Year, Change Re..., Journal Line Ref, Journal Line (Title), Brief Description, Change Request Stage, Export Batch Number, and Addition.

The table contains the following data:

Budget Year	Change Re...	Journal Line Ref (ex: ALB18-001)	Journal Line (Title)	Brief Description	Change Request Stage	Export Batch Number	Addition
2024 - 2025	Budget Transf...	QST0000196	BT 04 OoP 73700 to Various 1576		1-Proposed Transfer [Budget Tra...		
2024 - 2025	Position Budg...	QST0000194	PBA 04 OoP 4843 5736 to 1225		1-Proposed Transfer [Position Bu...		
2024 - 2025	One-Sided: Bu...	QST0000193	BT - 04 - ADM - PCRxx - 72010 - Cost Recovery Allocations	Cost recovery allocations.	3-Final Approval [One-Sided: Bud...		
2024 - 2025	Budget Transf...	QST0000192	BT - 04 - ACA - POM01 - 20800 - Re-Distribute Budget	Re-distribute budget to student assis...	2-Management Review [Budget T...		
2024 - 2025	Budget Transf...	QST0000190	BT - 04 - ACA - POM01 - 16900 - Rubric Scoring Event	Rubric Scoring Event	3-Final Approval [Budget Transfer]	XBA20241023225529	
2024 - 2025	Budget Transf...	QST0000188	BT - 04 - ACA - POM01 - 16900 - STS AI Support 24-25 AY	STS AI Support	3-Final Approval [Budget Transfer]	XBA20241023225529	
2024 - 2025	Budget Transf...	QST0000187					

The detailed view of the selected request (2024 - 2025 | QST0000196 - BT 04 OoP 73700 to Various 1576) shows the 'Log History' section. It displays a sequence of actions performed by users:

- Debra Chavez (006883370) | October 24, 2024: Promoted to 3-Final Approval
- Debra Chavez (006883370) | October 24, 2024: Demoted to 2-Management Review
- Debra Chavez (006883370) | October 24, 2024: Demoted to 1-Proposed Transfer
- Phyo Kyaw (016759587) | October 24, 2024: Promoted to 2-Management Review
- Debra Chavez (006883370) | October 24, 2024: Promoted to 3-Final Approval

The 'Logs' section provides a detailed view of these actions, including the user's name, timestamp, and the specific operation performed (e.g., 'Updated Change Request', 'A promote or demote operation').

OE Budget Transfer Log History

3-FINAL APPROVAL



2024 - 2025

QST0000196 - BT 04 OoP 73700 to Various 1576

Main (Active) ▾

Demote

Publish

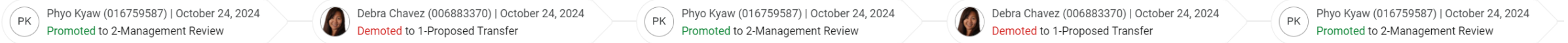
General ▾

• Operating ▾

Capital ▾

Reports ▾

Log History



Logs

- Debra Chavez (006883370) | October 24, 2024 at 4:37:17 PM
A promote or demote operation.
- Debra Chavez (006883370) | October 24, 2024 at 4:37:16 PM
Updated Change Request "QST0000196 - BT 04 OoP 73700 to Various 1576 (2024)"
- Debra Chavez (006883370) | October 24, 2024 at 4:37:15 PM
Updated Change Request "QST0000196 - BT 04 OoP 73700 to Various 1576 (2024)"
- Debra Chavez (006883370) | October 24, 2024 at 3:49:06 PM
A promote or demote operation.
- Debra Chavez (006883370) | October 24, 2024 at 3:49:05 PM
Updated Change Request "QST0000196 - BT 04 OoP 73700 to Various 1576 (2024)"
- Debra Chavez (006883370) | October 24, 2024 at 3:49:04 PM
Updated Change Request "QST0000196 - BT 04 OoP 73700 to Various 1576 (2024)"
- Debra Chavez (006883370) | October 24, 2024 at 2:40:24 PM
A promote or demote operation.
- Debra Chavez (006883370) | October 24, 2024 at 2:40:24 PM
Updated Change Request "QST0000196 - BT 04 OoP 73700 to Various 1576 (2024)"

Details

Log # 1345164

Updated Change Request "QST0000196 - BT 04 OoP 73700 to Various 1576 (2024)"

Changed Fields

Field Name	Previous Value	New Value
Change Request Stage	2-Management Review [Budget Transfer]	3-Final Approval [Budget Transfer]



Questions?

Please email us at budget@cpp.edu