

Questica OnePager

10/31/2024

Recently Completed

- OpenBook went live and added to Financial Transparency website
- Provided PBA training to end-users
- Provided O/E budget transfer (direct input) to end-users



Coming Soon

- Questica software upgrade (new reporting features)
- Questica demo
- Budget journal web API integration
- Tableau position budget – phase II with live update



In Progress

- Questica reports
- Testing new 2023 Questica Projection feature
- Upgrade to unlimited licenses



Risks

- Vendor service improved after CSU Procurement provided feedback. Will continue to observe.



Completed to Date

POSITION BUDGET



- Migrated all positions to Questica.
- Completed modifier setup for benefit calcs.
- Set up monthly personnel sync to update vacancies and position attributes.

OPERATING BUDGET



- FY23-24: Established position budget using Questica. Used PeopleSoft for O/E.
- FY24-25: BPA establish both position & O/E budgets in Questica.
- [FY25-26: Divisions establish position & O/E budgets in Questica.]

INTEGRATION & OPENBOOK



- Fully validated integration of actuals (PeopleSoft to Questica) and budget journal export.
- Set up OpenBook data visualization.

DOCUMENTATION & PROCESS



- Developed position management ops detail.
- Established Position Budget Adjustment process.
- Established benefits allocation automation.
- Created over 130 pages of documented administrative procedures

Roll-Out Plan Summary



FY24-25 (Opt-In Period, Nov - Jun)

Submit O/E budget transfers in Qestica (optional, opt in)
Submit Position Budget Adjustment (PBA) form to Budget Planning & Analysis



FY25-26 Qestica Roll-Out (March)

Submit annual budget in Qestica
Submit O/E budget transfers in Qestica
Submit Position Budget Adjustment in Qestica (optional)

FY25-26 Aux Ent.

Budget due end of June

Roll-Out Plan



<p>Training Provide Position Budget Adjustment (PBA) form training. Optional O/E budget transfer (direct input) training for early adopters.</p>	<p>O/E Transfers Divisions & AVP/Dean levels can opt in to submit O/E transfers directly in Questica. Complete training as a prerequisite.</p>	<p>Training Annual Budget Development Training. Divisions will learn how to prepare budget in Questica (distributed model).</p>	<p>Roll-Out ★ Divisions will prepare FY25-26 budget directly in Questica (distributed model).</p>	<p>Aux Enterprise Parking, UHS, CPGE budget due end of June.</p>	<p>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.</p>
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