# 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.

 $( \mathbf{n} )$ 



# **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

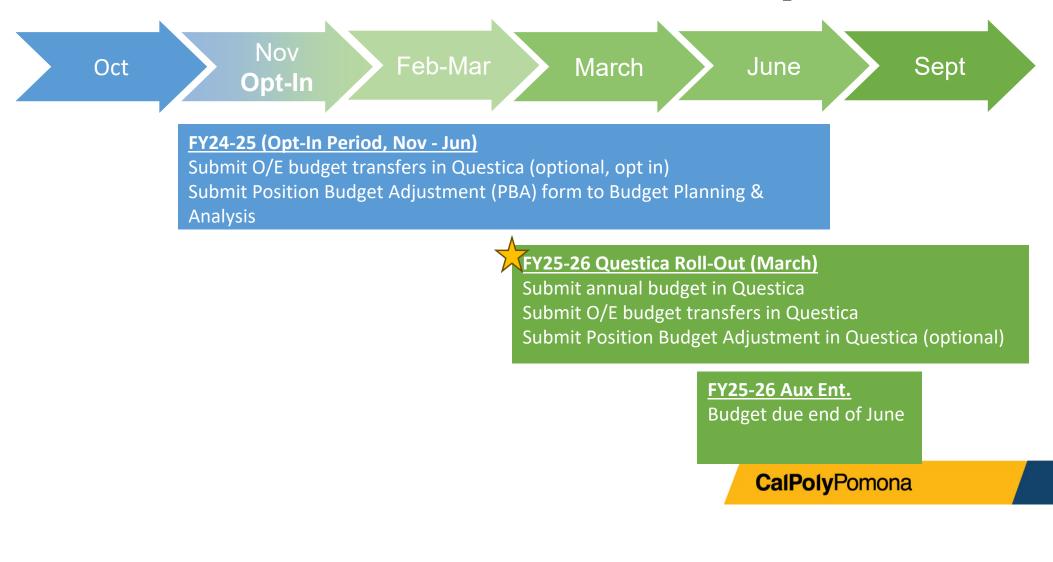


- Developed position management ops detail.
- Established Position Budget Adjustment process.
- Established benefits allocation automation.
- Created over 130 pages of documented

administrative procedures



### **Roll-Out Plan Summary**



## **Roll-Out** Plan

Training Provide Position Budget Adjustment (PBA) form training.O/E Transfers Divisions & AVP/Dean levels can opt in to submit O/E transfers Divisions will training.Training Budget Development Training.Roll-OutAux Enterprise Parking, UHS, CPGE budget due end of June.Budget Due FY25-26 budget directly in Questica (direct input) training for early adopters.Budget Divisions will Divisions will Parking, UHS, Divisions will Divisions will Questica (distributed model).Aux Enterprise Parking, UHS, CPGE budget due end of June.Budget Due FY25-26 budget directly in Questica (distributed model).Training for early adopters.O/E transfers Questica. prerequisite.Divisions will Uevelopment Training.Roll-OutAux Enterprise Parking, UHS, CPGE budget due end of June.Budget Due FY25-26 budget directly in Questica (distributed model).Training for early adopters.O/E transfers Questica. prerequisite.Divisions can udistributed model).Roll-OutAux Enterprise Parking, UHS, CPGE budget due end of June.Budget Due FY25-26 budget directly in Questica (distributed model).	Oct	Nov Opt-In	Feb-Mar	March	June	Sept
	Provide Position Budget Adjustment (PBA) form training. Optional O/E budget transfer (direct input) training for	Divisions & AVP/Dean levels can opt in to submit O/E transfers directly in Questica. Complete training as a	Annual Budget Development Training. Divisions will learn how to prepare budget in Questica (distributed	Divisions will prepare FY25-26 budget directly in Questica (distributed	Parking, UHS, CPGE budget due	FY25-26 budget will be due in mid- to late- September. <b>Training</b> BP&A will provide O/E and PBA (direct input) training. Divisions can wait to adopt