# Questica Personnel Module

## CONTENTS

## OVERVIEW

There are four interdependent modules Questica Budget uses to calculate salary and benefit costs and allocate them to cost centers (chartfield strings): Positions, Employee, Modifiers, and Position Allocations. This training guide focuses on the two modules users have access to – Positions and Position Allocations – but for successful budget planning it is helpful to have a basic understanding of the key inputs contained within each module and the way they interact to eventually derive the salary and benefit budget to each cost center.

The Position module contains important data serving the foundation of salary and benefit budget planning. Positions in general define the role within an organization and are more permanent than the employee(s) that occupy the position.  Thus, as it pertains to financial planning, positions are what we are planning for. The following are the key data fields in this module that Cal Poly currently utilizes to prepare a salary and benefit budget: FTE (time basis), wage, salary account, position start date, employee assigned to the position, and job class (which defines the bargaining unit the position belongs to).  Other fields described later are also used and can be useful for reporting.

The Employee module contains the descriptive information one would expect, such as name and ID, but the most important data as it relates to budget calculations are the health and dental plan elections, including size (individual, +1, family).

Modifiers are used to calculate costs other than the wage contained within Position – Cal Poly currently uses Modifiers to calculate benefit costs and GSIs (when applicable).  Questica Modifiers use Conditions and Cost Calculations to derive these amounts.  Conditions specify in what instance the Modifier is applied, such as the type and size of a benefit plan and/or bargaining unit. Cost Calculations specify the type (such as a flat cost for a health plan or percentage of salary for retirement), frequency, and amount(s).  Finally, each modifier interacts with the information contained within the Position and Employee modules to calculate the cost specified for a position by that Modifier.  There are over 100 individual Modifiers in effect due to the number of benefit types and differing conditions.

While Positions, Employees, and Modifiers are used to calculate the total salary and benefit cost for a position, the Position Allocation module is used to specify what Cost Center(s) (chartfield string(s)) those costs are allocated to and, if split funded, in what proportions.

Each fiscal year, University Budget & Fiscal Planning loads data from PeopleSoft to the Position, Employee, and Position Allocation tables, and updates Modifiers per information from Human Resources, prior to opening Questica for user planning.  This creates a starting point with current data, that can then be modified during the budget cycle before arriving at a final budget.  Users have access to edit/create Positions and Position Allocations, but University Budget & Fiscal Planning maintains the Employee and Modifier modules.  Please contact Position Budget if you have questions about data in the Employee or Modifier modules.
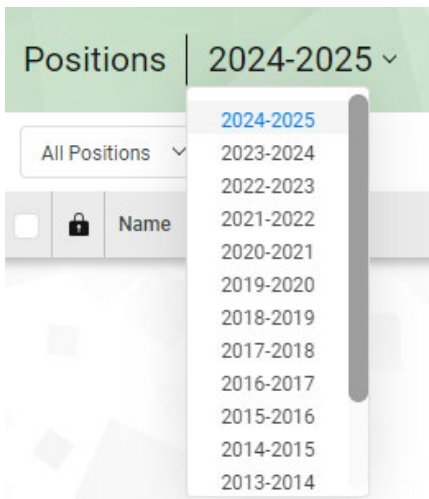
CSU Salary Schedule Structure
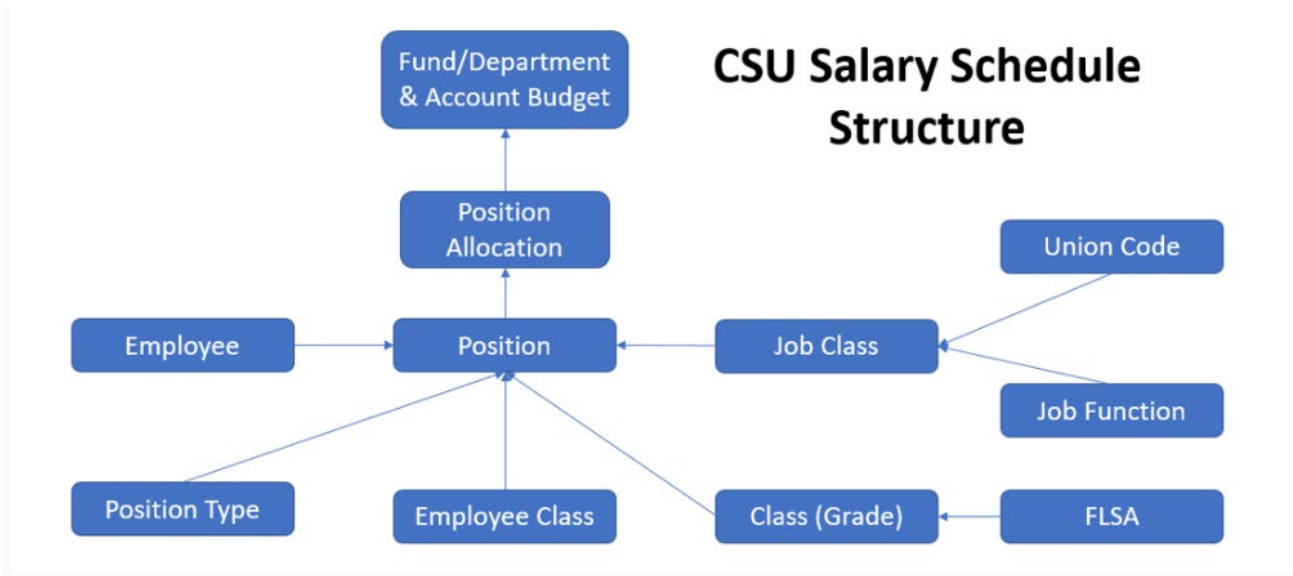
# POSITIONS

Positions can be viewed and/or created/edited by going to **Budgeting>Personnel>Positions**
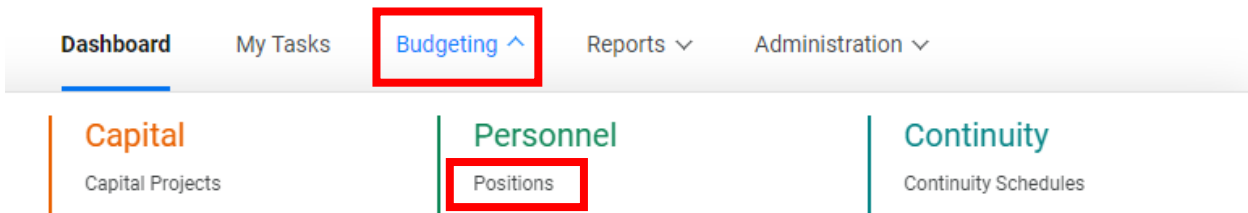


Ensure the correct Budget Year is selected, and adjust if necessary via the drop-down menu:

Press the magnifying glass (with the search box empty) to see all positions available to you.  Or use the search function to locate specific position records: enter text, such as a position #, in the keyword Search box (does not have to be an exact phrase match), or use Advanced Search to search for specific field-based criteria, such as all positions within a job code.
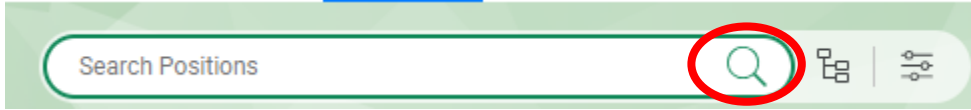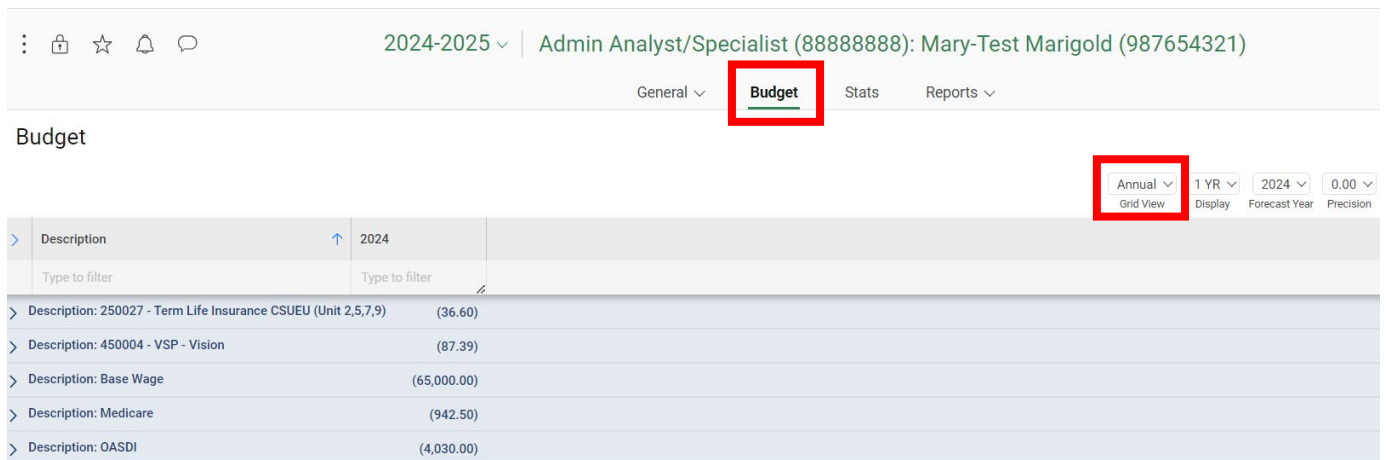


## VIEWING A POSITION'S COSTING DETAILS

To look at costing details click on the hyperlinked record or, right click and select Open Position
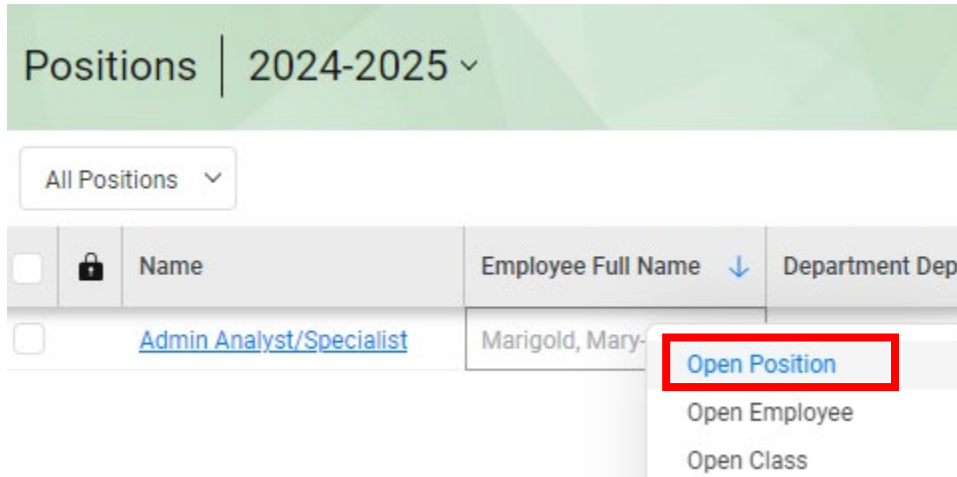


In the menu bar, you can choose **Budget** to review **Annual** (annual costs summarized), **Trimester**, **Quarterly**, or **Monthly Costing** (month by month breakdown of all costs associated with the position).

# BUDGET DISPLAY YEARS

In the upper right you can choose how many years of Budget to view.

1. Choose the amount of years via the drop-down:
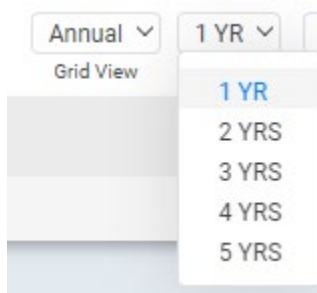


# EDITING AND SAVING A GRID LAYOUT

Select the layout icon in the upper right corner:
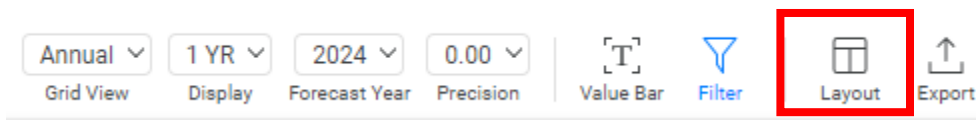


A menu will appear on the right, displaying your current layout selections. Add columns and groupings by selecting the "+" symbol next to each section and selecting the desired field(s). Columns identify what fields are visible in the grid and their sequence. Groupings sort like data in the chosen field(s) next to each other, can be opened and closed (similar to a grouping in Excel), and displays subtotals for the group(s).
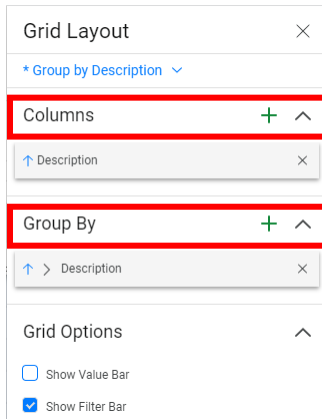
To save your layout, select the drop down under the Grid Layout header and select Save As…  Enter a name, select the check box if you want it as your default layout, followed by Save.  This same dropdown contains all the saved layouts available to you.
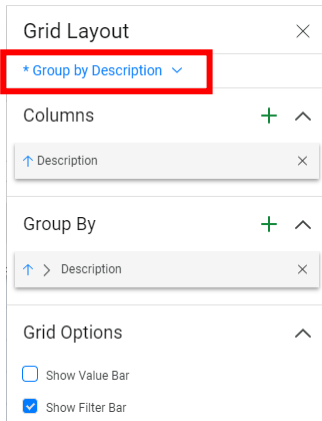


Saving a grid will allow you to set it as a default, and/or to have readily available for future use.
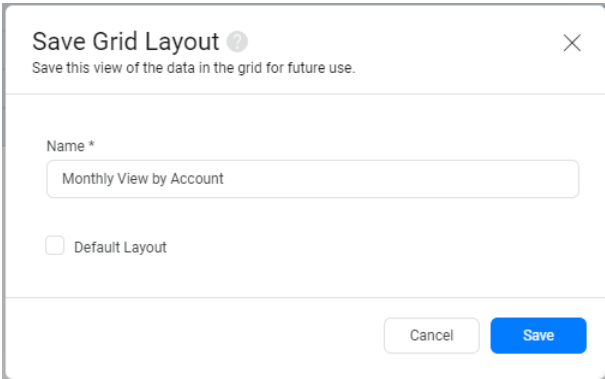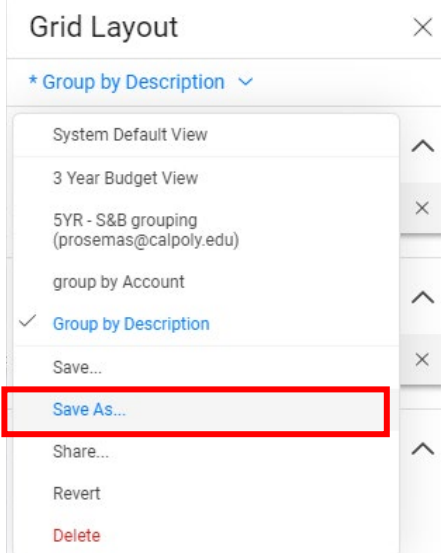
Viewing a position's budget with benefits subtotaled and grouped separately from salary is a common layout choice. University Budget & Fiscal Planning has created a layout with this grouping and shared it with every user ("5YR - S&B grouping"):

| Account | Earning Type ↓ | Description | 2024 | 2025 | 2026 | 2027 | 2028 |
|---|---|---|---|---|---|---|---|
| Type to filter | Type to filter | Type to filter | Type to filter | Type to filter | Type to filter | Type to filter | Type to filter |
| Earning Type: WRK - Productive | | | (100,000.00) | (110,000.00) | (121,000.00) | (133,100.00) | (146,410.00) |
| 601300 - Support Staff Salaries | WRK - Productive | Base Wage | 100,000.00 | 110,000.00 | 121,000.00 | 133,100.00 | 146,410.00 |
| Earning Type: BUC - Uncategorized Benefit | | | (51,455.46) | (55,773.49) | (60,498.63) | (65,670.90) | (69,576.45) |
| 603001 - OASDI | BUC - Uncategorized Benefit | OASDI | 6,200.00 | 6,820.00 | 7,502.00 | 8,252.20 | 9,077.42 |
| 603012 - Medicare | BUC - Uncategorized Benefit | Medicare | 1,450.00 | 1,595.00 | 1,754.50 | 1,929.95 | 2,122.95 |
| 603013 - Vision Care | BUC - Uncategorized Benefit | 450004 - VSP - Vision | 87.39 | 89.98 | 92.69 | 95.52 | 96.72 |
| 603011 - Life Insurance | BUC - Uncategorized Benefit | 250027 - Term Life Insurance CSUEU (Unit 2,5,7,9) | 36.60 | 36.60 | 36.60 | 36.60 | 36.60 |
| 603005 - Retirement | BUC - Uncategorized Benefit | Retirement - All except R08 - emp hired 2013 and af… | 32,000.00 | 35,200.00 | 38,720.00 | 42,592.00 | 45,321.28 |
| 603003 - Dental Insurance | BUC - Uncategorized Benefit | Dental | 576.63 | 593.90 | 611.70 | 630.05 | 637.80 |
| 603004 - Health and Welfare | BUC - Uncategorized Benefit | Health | 11,104.84 | 11,438.01 | 11,781.14 | 12,134.58 | 12,283.68 |

## ADDING A POSITION

In the upper right-hand corner, click on **+ Add**.



A form template will open. Enter the required information referencing the field definitions below. The HR Administration system or HR Dashboard may need to be used to gather the correct information about the position (such as job code, etc.). Select the blue OK button when finished.

The position will open in a new tab.

Review that general position and wage attributes were completed correctly within the **General -> Position** and **General -> Wage** menus. Future adjustments to the salary can be made within the Wage menu.

Navigate to the **General -> Position Allocation** menu and add the CFS (or multiple CFSs and their proportion) the position budget is allocated to. When finished, press the blue **Save** button followed by the **Publish** button in the upper right corner, then **OK** in the next window.

Publishing is a required step for the budget data within a position to flow to the Fund-Department(s) budgets. If a new position is created (or edited) and only Save is selected, the details will be saved within the Position record, but the Fund-Department budget will not be affected. Refer to your division budget lead if you do not have the ability to publish, as they may have requested unique security that would permit their users to stage new positions and position changes, but require their approval to publish those changes to budget.

## Create Position ⍰

Create a new Position.                                                    ✕

Name *

Administrator III

Position Number *

00000092

Employee

Dolly-Test Parton (987654322)                              ▼    ⧉

Position Type *

FULL                                                              ▼

Class

3306 - 1                                                   ▼    ⧉

Home Department

145000 - President                                                ▼

Account *

601201 - Management and Supervisory                               ▼

| FTE Definition * | Paid Hours * | FTE |
|---|---|---|
| 2080 | 2080 | 1 |

Current Salary per FTE

225000

Start Date *

| 2024 | April ▾ |
|---|---|

End Date

|  | ▾ |
|---|---|

Cost Position Using *

Salary                                                            ▼

EMPL Record



Retirement Plan

▼

Position Security Group *

President ▾

Employee Class

Regular ▾

Working Title

Associate Vice President of Musical Affairs

Job Class *

3306 - Administrator III ▾

Notes

Cancel **OK**

Administrator III (00000092): Dolly-Test Parton (987654322)

Unpublish **Publish**

**General** ∨    Budget    Stats    Reports ∨

Published 2023-12-12 2:28 PM

**Save**

## Publish To Operating ?

Publish Positions To Operating                                    ✕

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

Budgets Affected          0    See Details
Number of Positions       1    See Details
Fund-Department Affected  0    See Details

Are you sure you want to continue?

Cancel    **OK**

FIELD DEFINITIONS

**Name**: Name of the Position
**Position Number**: predetermined and managed in PeopleSoft
This is the primary key value meaning that there can only be one Position record with this Position Number.
**Position Type**: *Full Time* or *Part Time*
**Class**: an HR code used to classify position types
**Home Department**: Home Department Id (as opposed to Charge Department(s))
**Account**: Account the salary will be paid from
**FTE Definition**: The number of annual hours that defines 1 FTE
Most regular full-time staff will be at 1 FTE, the equivalent to 2080 hours worked on an annual basis

**Paid Hours/FTE**: amount of hours the employee will work and be paid for on an annual basis
If you manipulate Paid Hours, the FTE will automatically adjust, and vice versa.

| FTE Definition | 2080 | Paid Hours | 1040 | FTE | .5 |
|---|---|---|---|---|---|

**Current Salary per FTE**: annual salary assuming full time basis (1 FTE)
**Start Date**: date the position was created/approved
In the initial position load process, January 1<sup>st</sup> preceding the start of the fiscal year is populated in this field as a placeholder
**Position Security Group**: the security group that the position belongs to
You will only be able to select from options that have been assigned to you; in most cases there will only be one option. Select the appropriate security group based on the description.
**Employee Class:** should <u>always</u> be set to *Regular* and can effect other modules if changed.
**Working Title:** should match the Working Title of the Position
**Job Class:** Matches the first four numbers of the *Class* (see above)

## EDIT A POSITION

You may need to edit a position in order to adjust the position type, FTE, wage, etc…

Use the drop down to select the Budget Year (that you are planning for) and use the search functionality described previously to locate the position, or alternatively press Search (without any criteria) to see all of the available positions to you.

Select the Position by left clicking the blue hyperlink or right clicking and selecting Open Position.



A new browser window will open with access to all applicable menus and fields for the position. Adjust general position attributes and time basis within the **General -> Position** menu and salary in the **General -> Wage** menu. Adjust the CFS (or multiple CFSs and their proportions) the position budget is allocated to in **General -> Position Allocation**. Budget costing can be viewed in the **Budget** menu as described previously.

Make sure to save and publish after all adjustments have been made.

General ⌃    Budget    Stats    Reports ⌄

✓ Position
Position Revisions
Wage
Earning Breakdown
Position Allocations
Documents

History

## Position Information

Name *

Administrator III

Position Number *

00000092

Position Security Group *

President    ▾

Position Type *

FULL    ▾

FTE Definition *          Paid Hours *          FTE

2080                      2080                  1

Start Date *              End Date              Year 1 Paid Hours

2024    April  ▾                      ▾        2080

Class                                           Cost Position Using *

3306 - 1    ▾    ⧉                               Salary    ▾

Account *

601201 - Management and Supervisory    ▾

---

General ⌃    Budg

Position
Position Revisions
✓ Wage
Earning Breakdown
Position Allocations
Documents

History

## Position Wage Details

Cost Position Using *

Salary    ▾

Current Salary per FTE *        Anniversary Month *        Increase Rate *

225,000.00                         ▾

## DELETE A POSITION

At this time, UBFP maintains deletion privileges to positions. If you think that you need a position deleted, please consult with us. Deleting a position usually means you do not plan to rehire the position. It likely also entails making the position Inactive in PeopleSoft.

# POSITION WAGE DETAILS

Wages (salary), including planned increases (IRP's, reclassifications) can be entered to assist with budget planning. Navigate to Position Wage Details within a position via **General -> Wage:**

## Position Wage Details

Cost Position Using *

Salary

Current Salary per FTE *

60,000.00

Anniversary Month *

Increase Rate *

| ☐ | 🔒 | Effective Date | ↑ | Entry | Amount Type | Amount | FTE Salary |
|---|---|---|---|---|---|---|---|

## ENTERING A MANUAL WAGE ADJUSTMENT

**Anniversary Month** can be used if this month qualifies an annual salary increase; should be used in conjunction with the *Increase Rate* field

**Increase Rate** percentage of the increase (based on the Current Salary per FTE) on the *Anniversary Month*

**Effective Date** should capture the date & year that you want the revision to begin (specific date will automatically default to a month/year combination)

> *Selecting a month/year combination outside of the Fiscal Year will cause an error message*
>
> ⊘  The changes you requested would cause the PositionWageAmount to fall outside the Position's effective costing period.

**Entry** will populate as Manual after entry is made

**Amount Type** the measurement you want to use for the increase

| Amount Type | Amou |
|---|---|
|  |  |

🔍

Percent
Dollar
New Wage

**Amount** the value of the increase (needs to match the Amount Type that you selected)

**FTE Salary** will populate with the revised salary

Click **+ Add** in the middle right section of the screen.

1.  Select an **Effective Date, Amount Type, and Amount** as defined above.
2.  When your entry is complete Publish the record.

## EXAMPLE OF AN ANNUAL SALARY INCREASE

This position has a current annual salary of $60,000. Each year, on the set Anniversary Month, the position will receive a 3% increase. This view shows us the increased salary for the next five years:

Position Wage Details

Cost Position Using *

| Salary | ∨ |

| Current Salary per FTE * | Anniversary Month * | Increase Rate * |
|---|---|---|
| 60,000.00 | March ∨ | 3.000000 |

| | 🔒 | Effective Date ↑ | Entry | Amount Type | Amount | FTE Salary |
|---|---|---|---|---|---|---|
| ☐ | ⊖ | Mar 2025 | Auto | Percent | 3.00 | 61,800.00 |
| ☐ | ⊖ | Mar 2026 | Auto | Percent | 3.00 | 63,654.00 |
| ☐ | ⊖ | Mar 2027 | Auto | Percent | 3.00 | 65,563.62 |
| ☐ | ⊖ | Mar 2028 | Auto | Percent | 3.00 | 67,530.53 |
| ☐ | ⊖ | Mar 2029 | Auto | Percent | 3.00 | 69,556.44 |

In the current budget year, we can see the increase to the salary became effective on March 1st:

| Nov | Dec | Jan | Feb | Mar | Apr | May |
|---|---|---|---|---|---|---|
| Type to filter | Type to filter | Type to filter | Type to filter | Type to filter | Type to filter | Type to filter |
| (5,000.00) | (5,000.00) | (5,000.00) | (5,000.00) | (5,150.00) | (5,150.00) | (5,150.00) |

## EDIT OR DELETE A WAGE ADJUSTMENT

Right click and make your selection to edit or delete the record.

## Position Wage Details

**Cost Position Using ***

Salary

**Current Salary per FTE ***

60,000.00

**Anniversary Month ***

**Increase Rate ***

| | 🔒 | Effective Date ↑ | Entry | Amount Type | Amount |
|---|---|---|---|---|---|
| ☐ | | Oct 2024 | Manual | Percent | 5.00 |

Edit

Copy Row to Clipboard

Delete

Remember that any edits require Publishing affect the Fund-Department(s) budgets.
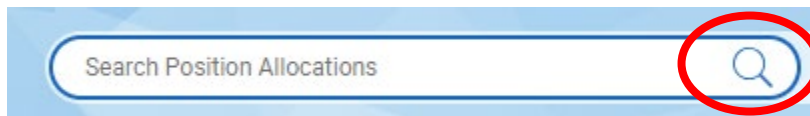
# POSITION ALLOCATIONS

Position allocations are also initially loaded into Questica prior to the budget planning process.
This drives the starting point for the anticipated allocation of salary and benefit costs to cost center(s) based on that position's actual allocations at the time of loading.  It is important to note that costs for a position without a position allocation (or allocations if split funded) will not be budgeted anywhere.

Verify that all active positions planned for the current/upcoming fiscal year were uploaded to each Fund-Department by navigating to the menu bar and selecting **Positions>Position Allocations**:
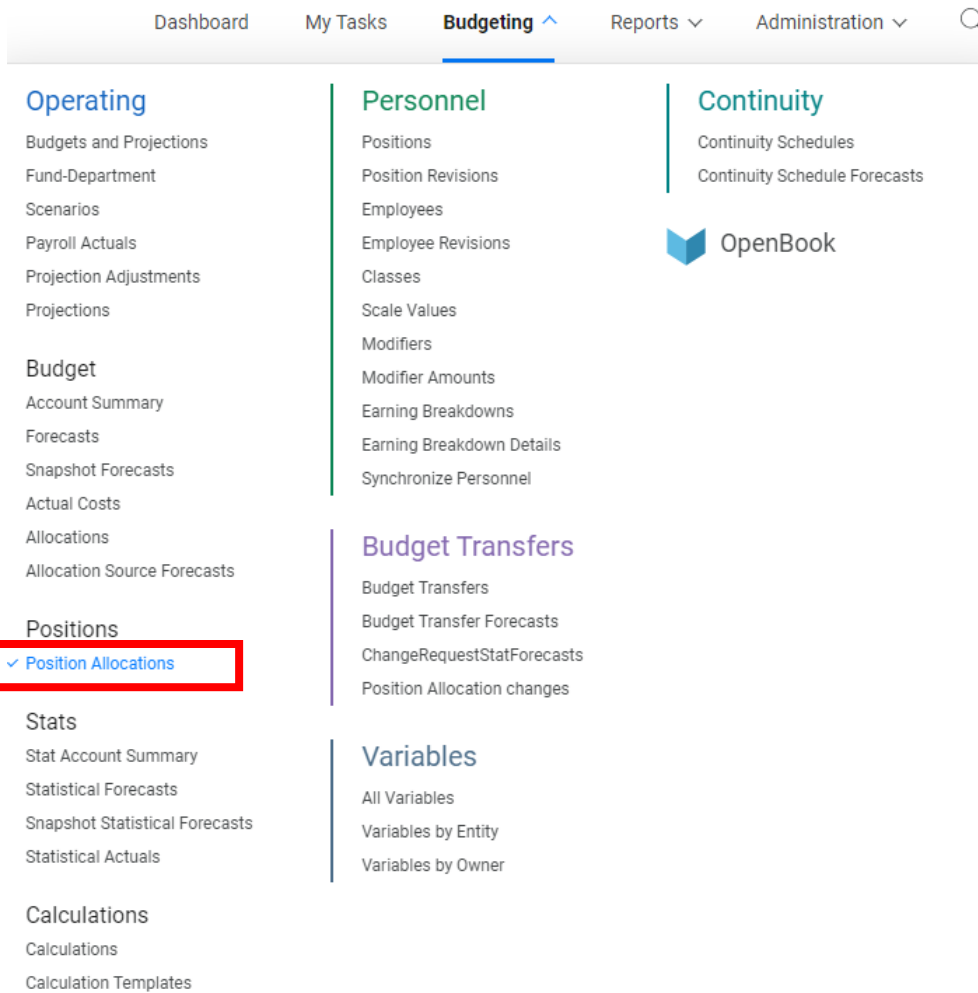
Use the drop down to select appropriate Budget Year.

You can type a Dept Id, Employee Name, Fund, or Position in the keyword Search box (does not have to be an exact phrase match), use Advanced Search for specific criteria, or press Search (magnifying glass icon) to see all of the position allocations available to you.



## FIELD DEFINITIONS

**Position**: Title, combination of position number and employee id, employee name
Select from the dropdown menu options
**Amount**: The amount of total (annual) position costs that will be allocated to the chartfield string
1 is equal to 100%, decimals are used for anything under 100%; example .50 would be 50%
This number will be equivalent to the Allocation Percentage.

Please note Amount* is not the FTE; rather, it is the percentage of the position's total salary and benefits that will be allocated to the chartfield(s) specified by the allocation(s). FTE is part of the Position attributes.

**Position Allocation Type**: determines how a position's costs are allocated to a chartfield
Should <u>always</u> be set to *Quantity*.
**Fund Department**: Chartfield combining the Fund and Department that position costs will be allocated to
**Program**: if applicable, the Program that the position's costs will be allocated to
**Project**: if applicable, the Project that the position's costs will be allocated to
**Class:** if applicable, the Class that the position's cost will be allocated to
**Ledger Group:** select *OPER_BUDG*
**Budget Scenario:** select *INI*

## ADDING POSITION ALLOCATIONS

Position allocations can be added (and edited) either by navigating to **Budgeting>Positions>Position Allocations** which provides access to all your allocations, or from within an individual position via **Budgeting>Personnel>Positions>General>Position Allocations**. Allocations can be added (and edited) directly within the application or via the export/import process. We recommend working directly within the application if you have one or two additions/edits, and export/import if you have multiple.

To add within the application, click on **+ Add** in the upper right-hand corner.
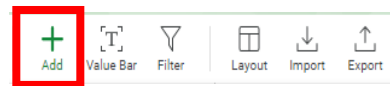
## Create New Position Allocation
Enter the details for a new Position Allocation

×

Scenario *
SLCMP - SLF03 - 100800 - 948-485 Cal Poly Opportunity - CAFES-Natural Res Mgmt&En... ✕

Select **YOUR** scenario

Positions
[ Choose Positions ] [ New ]  0 Positions Selected.

Choose position

Description

Not commonly used, but you can enter general comments here

Position Allocation Type *          Amount
Quantity                      ▼     100

Defaults to *100*, see Field Definitions for information on how to update. Use 1 for 100%

Start Date                          End Date
1        July        ▼

Program
▼

Project
▼

See above Field Definitions

Class
▼

Ledger Group *
OPER_BUDG                     ▼

Budget Scenario *
INI                           ▼

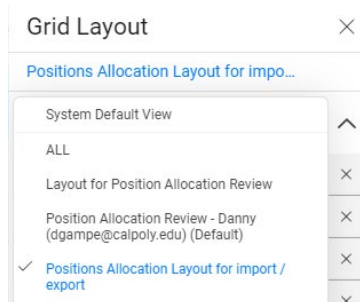Cancel     **OK**

Click **OK** when finished

## EDITING POSITION ALLOCATIONS

You can double click, or right click and select edit on an allocation record to update an existing allocation. Or, use the Export and Import features to edit, create, or delete existing allocations.

Start by making sure that your Layout has only the applicable (changeable) fields.
In the upper right, click on Layout:

➕        [T]        ▽         ▦          ⬇         ⬆
Add     Value Bar   Filter    Layout     Import     Export
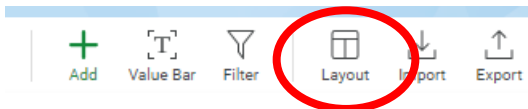
**From the dropdown menu select the saved layout "Position allocation Layout for import/export":**

### Grid Layout                     ×

Positions Allocation Layout for impo...

System Default View                           ∧

ALL                                           ✕

Layout for Position Allocation Review         ✕

Position Allocation Review - Danny            ✕
(dgampe@calpoly.edu) (Default)

✓  Positions Allocation Layout for import /    ✕
   export
                                              ✕

To see all of your allocations in an Excel format, use the Export function in the upper right hand corner:
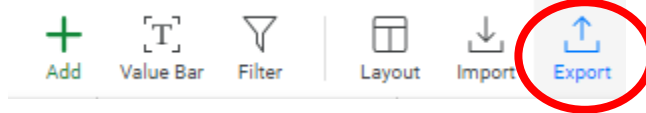


Make adjustment(s) in Excel:



---
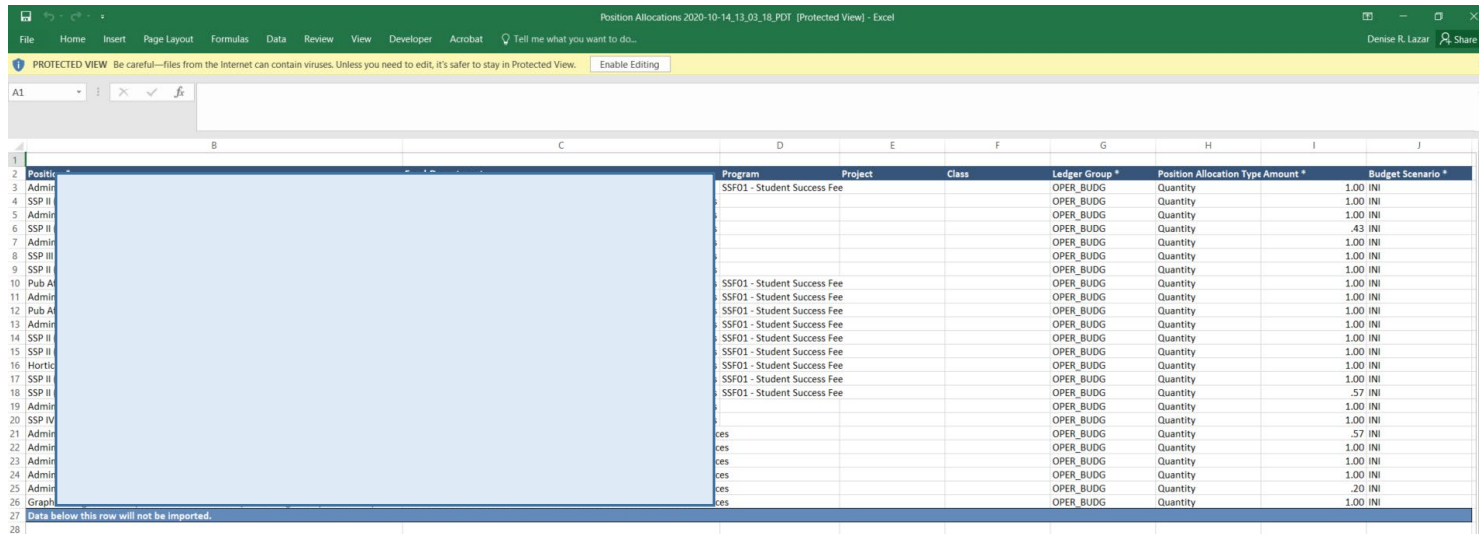
- *Column A is hidden; do not make any changes in this column*
- *There is also a blue footer line stating 'Data below this row will not be imported'; rows can be deleted or inserted but all entries must be made above this row.*

---

Adjustments to the Fund-Department, Program, Project, Class, Ledger Group*, and Budget Scenario should be selected via the drop down menu in the Excel document. If copying, it is recommended paste "values only", as disrupting the data validation within the file will cause it to error when loading. Amount* can be typed in.

To add an allocation insert a row above the blue row and populate using the dropdown menus where present or by typing in the cell.

Example: The position below is fully allocated to Test Fund-Dept with no other attributest (note, Amount* is equal to 1.00):

| Position * | Fund-Department | Program | Project | Class | Ledger Group * | Position All( | Amount | Budget Scenario * |
|---|---|---|---|---|---|---|---|---|
| Test Position 1 (12345678): | SLCMP - TEST1 - TEST01 - Test Dummy Fund - Test Department | | | | OPER_BUDG | Quantity | 1.00 | INI |

If you want to adjust this allocation so that 25% is allocated to Class code CU001:

1. Insert a row in the Excel doc
2. Use Position* drop down to select the same position or copy/paste the field from the other row
3. Use Fund-Department drop down to select where the remaining .25 will be charged to or copy/paste

4. Leave Program and Project blank
5. Select CU001 from the Class drop down menu
6. Use Ledger Group* drop down to select OPER_BUDG or copy/paste
7. Use Position Allocation Type drop down to select Quantity or copy/paste
8. Under Amount*, type .25
9. Use Budget Scenario drop down to select INI
10. In existing position row, adjust Amount* (was 1.00) to .75

| Position * | Fund-Department | Program | Project | Class | Ledger Group * | Position Allo | Amount | Budget Scenario * |
|---|---|---|---|---|---|---|---|---|
| Test Position 1 (12345678): | SLCMP - TEST1 - TEST01 - Test Dummy Fund - Test Department | | | | OPER_BUDG | Quantity | .75 | INI |
| Test Position 1 (12345678): | SLCMP - TEST1 - TEST01 - Test Dummy Fund - Test Department | | | CU001 - User D | OPER_BUDG | Quantity | .25 | INI |

When finished, save the document and return to Questica to Import your file.

## Import ⓘ
Select a file to import

| Select File | No file chosen |
|---|---|

Cancel    OK

+        [T]        ▽        ⊞        ↓        ↑
Add   Value Bar   Filter     Layout   Import   Export

Select your saved file and press OK.

## Import Spreadsheet ⓘ                                    ✕

Import data from a Microsoft Excel spreadsheet.

Importing the selected file will result in the following changes to Position Allocations:

New Items:      1

Updated Items:  1

Deleted Items:  0

Are you sure you want to continue?

Cancel        OK

Confirm the amount of New (lines added/removed)/Updated (adjusted) Items and press OK.

## Batch Process: Import Spreadsheet ⓘ                     ✕

Your Batch Process is executing.

Status Processing Changes from Spreadsheet

Progress    99.99%
Elapsed     00:00:08
Remaining   00:00:00
Errors      0

Errors & Warnings

Abort        Close

A progress bar will appear and will close automatically if/when successful.  If the process encounters an error, a message will be diplayed in the Errors/Warnings box with details.  Select the Abort button if you want to stopp the process.

## DELETE A POSITION ALLOCATION

Delete a Position Allocation by right clicking the hyperlinked line item and selecting Delete.
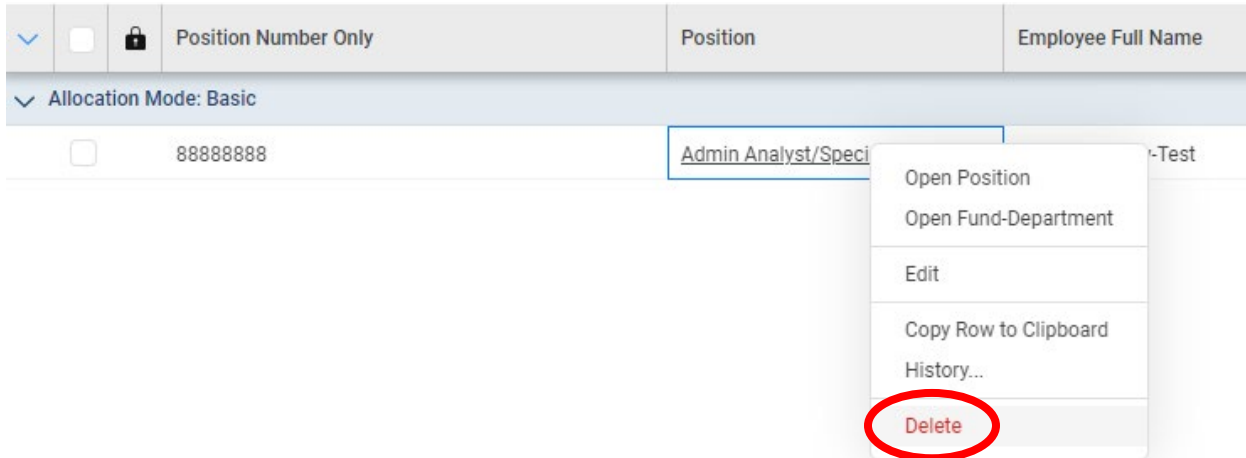
Click OK and the deletion will process.

Allocations can also be deleted using the export / import process by deleting the row in the exported file and importing back into Questica.

# POSITION REVISIONS

Position Revisions can be entered to assist with future planning. Changes to the Position Name, Type (Full/Part Time), FTE, Classification, and Description (Working Title) can be adjusted by setting an Effective Date.

Salary adjustments are not part of Position Revisions and will need to be made within the position **Wage** menu. See *Position Wage Details* for instructions.

## ADDING A POSITION REVISION

Revisions can be created within the position or by navigating to **Budgeting>Personnel>Position Revisions**

In the General section:
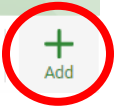


1. **Click Add** + in the upper right corner



* denotes required field

2. **Set Effective Date\*** set the time period (month/year) the revision begins

3.  **Search/Select Position\*** can be searched by title, position number, most recent incumbent's name or Empl Id
4.  **Name\*** is a required field and should briefly describe the personnel change
5.  **Description** manual entry to briefly describe the action

> *Clicking Save will take you out of the Position Revision Details, recommend not doing this until after step 7.*

6.  In the *Revision* menu bar on the left, click on **Changes**
7.  Adjust the areas that will be updated as of the Effective Date
    *TIP - If updating the FTE, you will need to make the adjustment under **Paid Hours\***
8.  The fields you edit will be highlighted in green; confirm, then **Click Save** (lower right corner).

Fields, the last menu option will show the revised attributes after the record saves.

## EXAMPLE OF ANTICIPATED RECLASSIFICATION

In this example, the position is being reclassified to an Admin I, effective October 2024:

Adjust the position attributes in the Changes menu.

The Name, Class, Account, Working Title, and Job Class need to be updated to reflect the change in this example.

**Note, wage amounts are not part of a Position Revision in Questica. A corresponding wage adjustment should be made in the Position, under Position > General > Wage. This process is described in the Position Wage Details section above starting on page 12.**

## VIEWING IMPACTS OF A POSITION REVISION

To view revisions, navigate to **Budgeting>Personnel>Position Revisions**

You can type the name (or portion of) the revision was saved under (in this example I typed reclass and revisions with that name variation came up):

Or, press Search (magnifying glass icon) to see all the revisions you created/saved.

> *The easiest way to view saved revisions is to press the magnifying glass in the Search box*

| | | | | |
|---|---|---|---|---|
| ∨ Position: Admin Analyst/Specialist (88888888): Mary-Test Marigold (987654321) | | | | |
| ☐ | Admin Analyst/Specialist (88888888); Mary-Test M... | Oct 2024 | Reclassification [↗] | Admin Analyst >> Administrator I |
| | | | Reclassification | |

Click on the hyperlinked Name (clicking into the Position will take you to the position's attributes/costing details). Changes can be viewed in the Fields menu of the Position Revision:

**Update Position Revision Details** ⓘ                                                     ✕
Update Position Revision Details for this Position.

| Revision | **Fields** | | |
|---|---|---|---|
| General | The Fields and Values shown are read-only and not updated until saved. Please use the Changes section to revise Fields. | | |
| Changes | | | |
| Fields | | | |

| Field | Previous Value | Revised Value |
|---|---|---|
| Name | Admin Analyst/Specialist | Administrator I |
| Class | 1038 - 1 | 3318 - 1 |
| Account | 601300 - Support Staff Salaries | 601201 - Management and Supervisory |
| Working Title | Admin Analyst/Specialist | Director of Plant Life and Education |
| Job Class | 1038 - Admin Analyst/Spclst 12 Mo | 3318 - Administrator I |

↻  5 records

Cancel    **Save**

# QUESTICA HELP SITE

In addition to contacting University Budget & Fiscal Planning for assistance, Questica offers a resource library with helpful articles, tips and videos. Below are some links that may benefit you when using our Training Guide.

When logged into QuesticaHelp select v2021+    [ **v2021+** | Legacy ]

https://help.questica.com/hc/en-us/articles/115002899674-Create-Positions

https://help.questica.com/hc/en-us/articles/360053870313-Position-Revisions

https://help.questica.com/hc/en-us/articles/115003007553-Create-a-Position-Allocation

https://help.questica.com/hc/en-us/articles/115003005473-Add-Edit-a-Position