



# Questica Budget Update

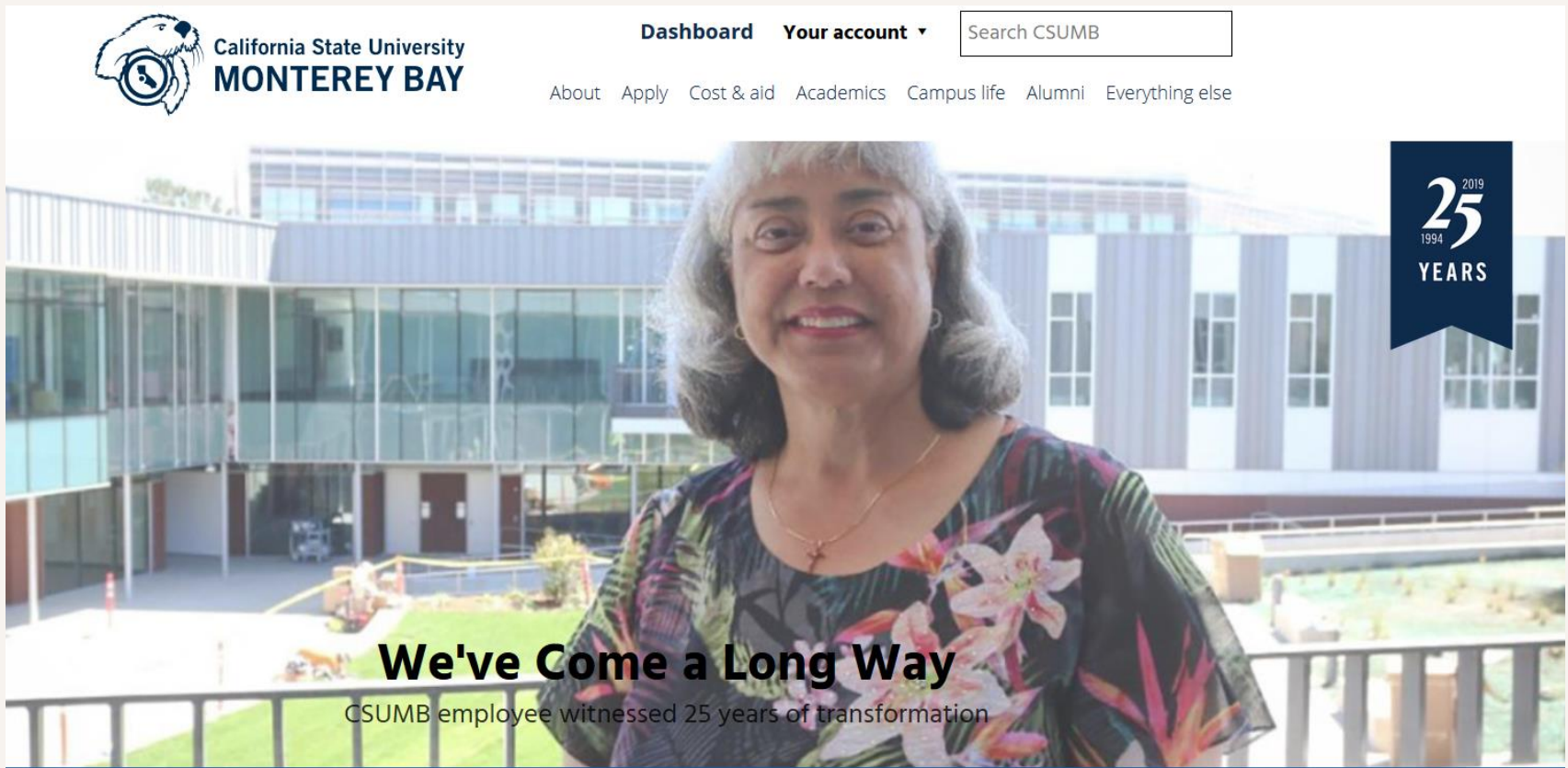
Business Operations Forum

26 Feb 2020



California State University  
**MONTEREY BAY**

# Our Rockstar!!!



## Reyola, thank you for your service!

# Agenda

- BOF Meeting Ground Rules
  - Steve Mackey
- Debbie Martin Introduction
  - Steve Mackey, Debbie Martin
- PaymentWorks
  - Art Evjen, Debbie Martin
- Questica Project Review
  - Steve Mackey
- Questica Budget Update
  - Yolanda Anglin



# BOF Meeting Ground Rules

- BOF presentations design:
  - Presentation are designed and delivered toward live attendance, zoom second and video last
  - Zoom was added to allow people to still “attend” and not miss the information
  - Video of BOF meetings are available - these are provided to allow people to go back and listen in.



# BOF Meeting Ground Rules

- The Zoom Experience:
  - Online presentation is a different type of delivery
  - But... There are live group actions inhibiting the effectiveness and usefulness
  - The Live attendees need to:
    - Allow presenters time to restate the question
    - 2-way conversations should be taken off-line
    - Chatter in the room must be kept to a minimum (train station effect)



# Debbie Martin Introduction



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# PaymentWorks Feedback



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# PaymentWorks Feedback

- Current State of Implementation
- Next Steps
  
- What's gone well?
- What are your challenges?
- What can we do to make it better for you and our vendors?





# Questica Project Review

August 2019 Extended Cabinet Presentation



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# Objectives of Project

- Simplify budget development process, monitoring and projections
- Review and update campus budget procedures and policies
- Implement effective *Position Budget Management* process

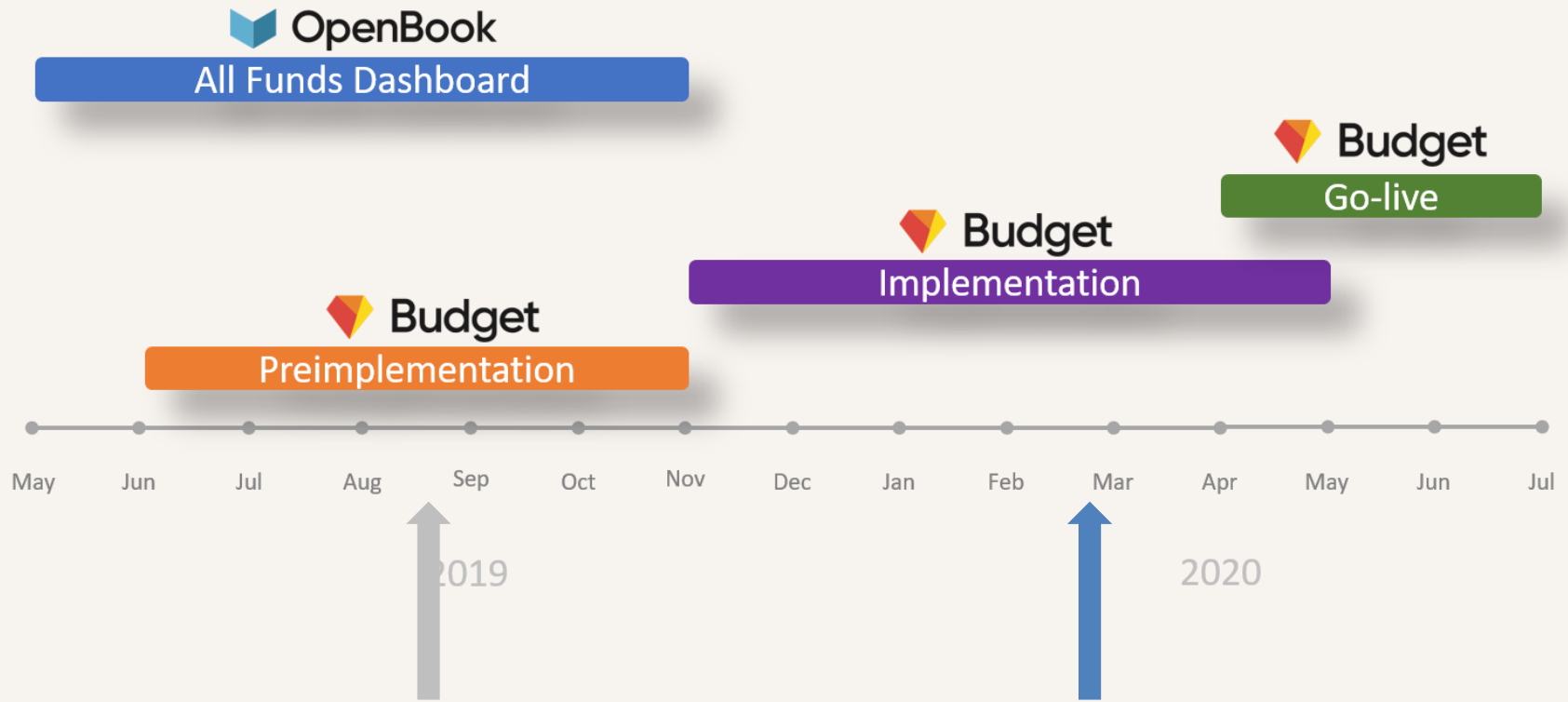


# Questica Budget Project Benefits

- **Streamline Budget Process:** positions, workflow, change management
- **Transparency:** all workflow and data in one place
- **Reporting:** automated financial data warehouse integration; real-time
- **CFS Warehouse:** reduce need for data warehouse queries
- **Data Governance:** standardization of stakeholder budget development and reporting process



# Implementation Roadmap



# Questica Budget Update



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# Questica Budget Implementation Update

- Designed for Your success
- Original Training and Rollout Plan
- Lessons Learned:
  - Pilot group
  - Working Groups Needs Analysis
  - From others (SLO, SB, Humboldt & Vanderbilt)
- Revised Training and Rollout Plan



# Questica Budget: Designed for Your success

- Designed for Your success:
  - Goal #1 - Online Position Lists (eliminating the use of manual spreadsheets)
  - Goal #2 - Answer the Question: How Much Budget Do I Really Have Available?
  - Goal #3 - Combine information from Two Systems into One
  - Goal #4 - Increase efficiency and have on-demand financial information



# Questica Budget: Original Training & Rollout Plan

- Original Training and Rollout Plan
  - *February*: Pilot Testers to Test
  - *February*: Development of Campus User Training
  - *April*: Needs Assessments with each Division
  - *June*: Formal Questica Budget Training to be conducted by Division
  - *July*: Operational Go-Live Date





# Questica Budget: Lessons Learned

- Lessons Learned:
  - Pilot group testers: they tested the workflow, user-defined roles, and critiqued the training plan.
  - Pilot group feedback: workflow/user-defined roles are operational. However, the complexity of the system related to the training plan would serve the campus better by moving the budget development input centrally and moving forward operationally July 1, 2020.
  - Working Groups Needs Analysis (posted on the Questica Project website)
  - From others (SLO, SB, Humboldt & Vanderbilt)



# Questica Budget: Revised Training & Rollout Plan

- Revised Training and Rollout Plan
  - *February-June*: **Pilot Testers** Continue to Test
  - *March-June*: **Pilot Division** Admin & Finance (AF) to Test
  - *April*: Needs Assessments with each Division
  - *June*: Formal Questica Budget Training to be conducted by Division
  - *July*: Operational Go-Live Date



# Other Questica Updates

- Last Month ASM/Budget Office was working on:
  - Defining user roles - *done*
  - Defining security permissions - *done*
  - Validating salary information - *done*
  - Creating learning tools for the campus users – *pending*
  - Testing budget development – *pending*
  - Pilot group identified – we will have them in the system shortly – *done and they informed the training plan*



# Other Questica Updates

- Currently ASM/Budget Office:
  - Meeting with Divisions regarding their business/user needs
  - Creating the learning tools for reporting needs and to assist the divisions in validating their salary information
  - Continuing to create learning tools for the pilot groups based on feedback
  - Continuing to create learning tools for the campus users
  - Budget development to be done on a status quo basis by the divisions and input into Questica to be done centrally. This will minimize the impact on the divisions of having to learn the system while also adhering to the deadlines.



# Thank You

- Next BOF 3/25/2020

