Position Management in Questica

By:

Questica Position Management Work Group

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Position Management in Questica

Position Management Work Group Members

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Purpose

Map out the current position management process; identify pain points and opportunities for improvement; and provide recommendations on how Questica should be used to enhance the process.

Meetings

- First meeting: 9:00 – 11:00 am, November 12, 2019
- Second meeting: 9:30 – 11:30 am, December 9, 2019

Findings

- Overall, we find that the majority of users consider position lists to be useful and necessary in their everyday jobs.
- Position lists are dynamic in nature and change frequently.
- Maintaining a current, accurate position list is a manual process that requires an excessive amount of time and effort for all parties involved.
- This workload varies dependent upon changes within the division/department.
- Generating and reconciling position lists is a labor-intensive process that requires accessing HR and CFS databases and combining the information in Excel.
- It was agreed upon that being able to view GSI/Merit changes in a timelier manner is highly desirable.
- Much of the detail of the current position list format appears unnecessary.

Recommendations

To effectively address our findings Questica needs to provide the following:

- Position information updated daily from CFS & CMS
- Ability to reference a single report to validate/audit a position list that would include information currently obtained from separate reports in CFS & CMS
    - And be in an acceptable format for the Budget Office

- Retain level of detail currently available in the Position Budget Roll-up Queries
- Reduce the manual nature of position management
- Forecasting position changes using what-if scenarios
- Affected departments/divisions should receive notifications of all position changes
- Access to Position data and reporting functions should be consistent among divisional analysts and consistent among college analysts
- Ability to add comments to Position Data lines (similar to current position list notes)
- Additional Position Data Should Include:
    - Exempt or Non-Exempt Status
    - Hourly Wage for Non-Exempt
    - Ability to get drill down details on:
        - Position Funding Structure/Pool ID
        - Fund/Class/Project/Program code description
    - Ability to generate partial FTE out to 6 decimal points (i.e. coaches, tutors)
    - Ability to see FTE equivalent annualized salary (i.e. academic chairs)

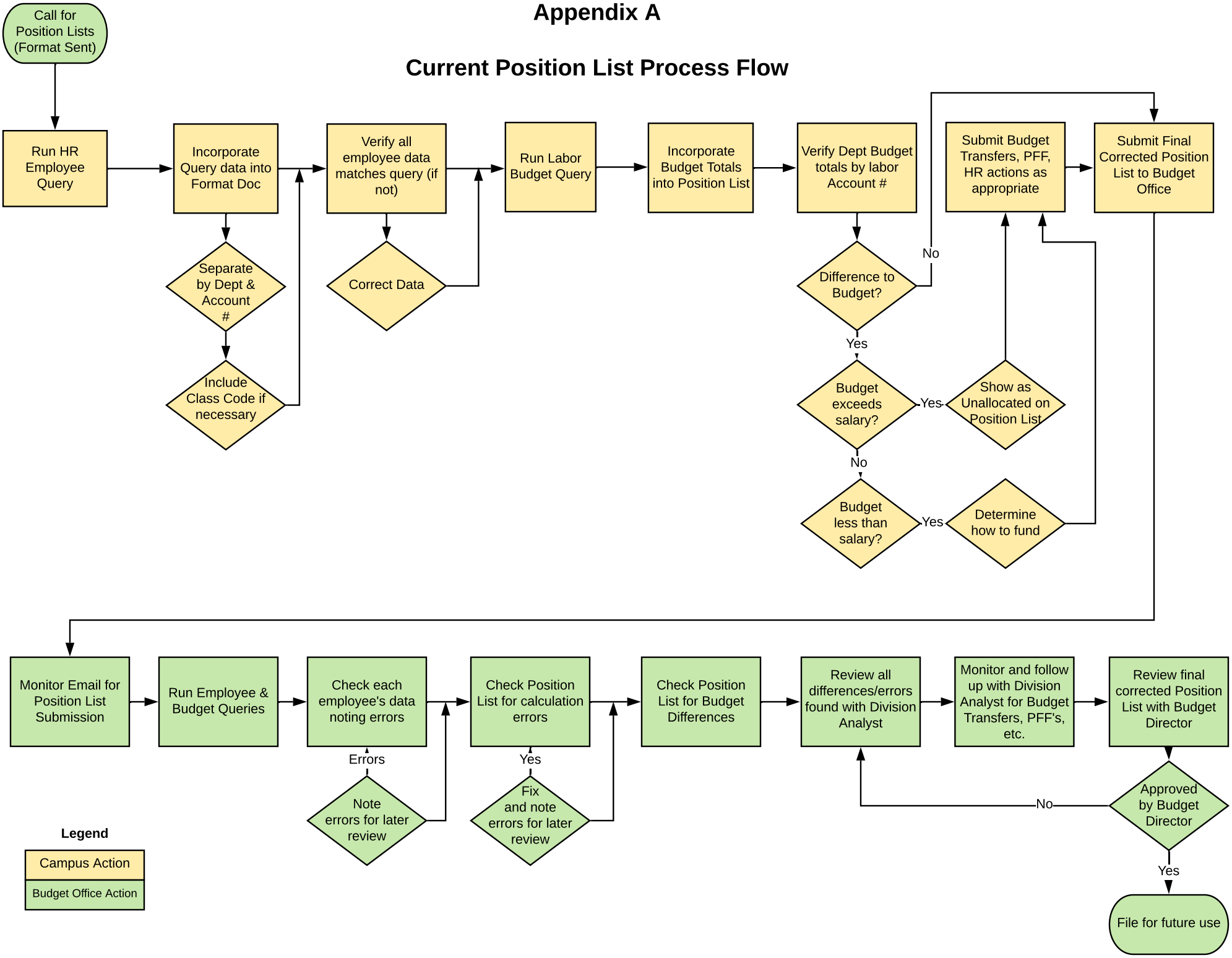
Conclusion

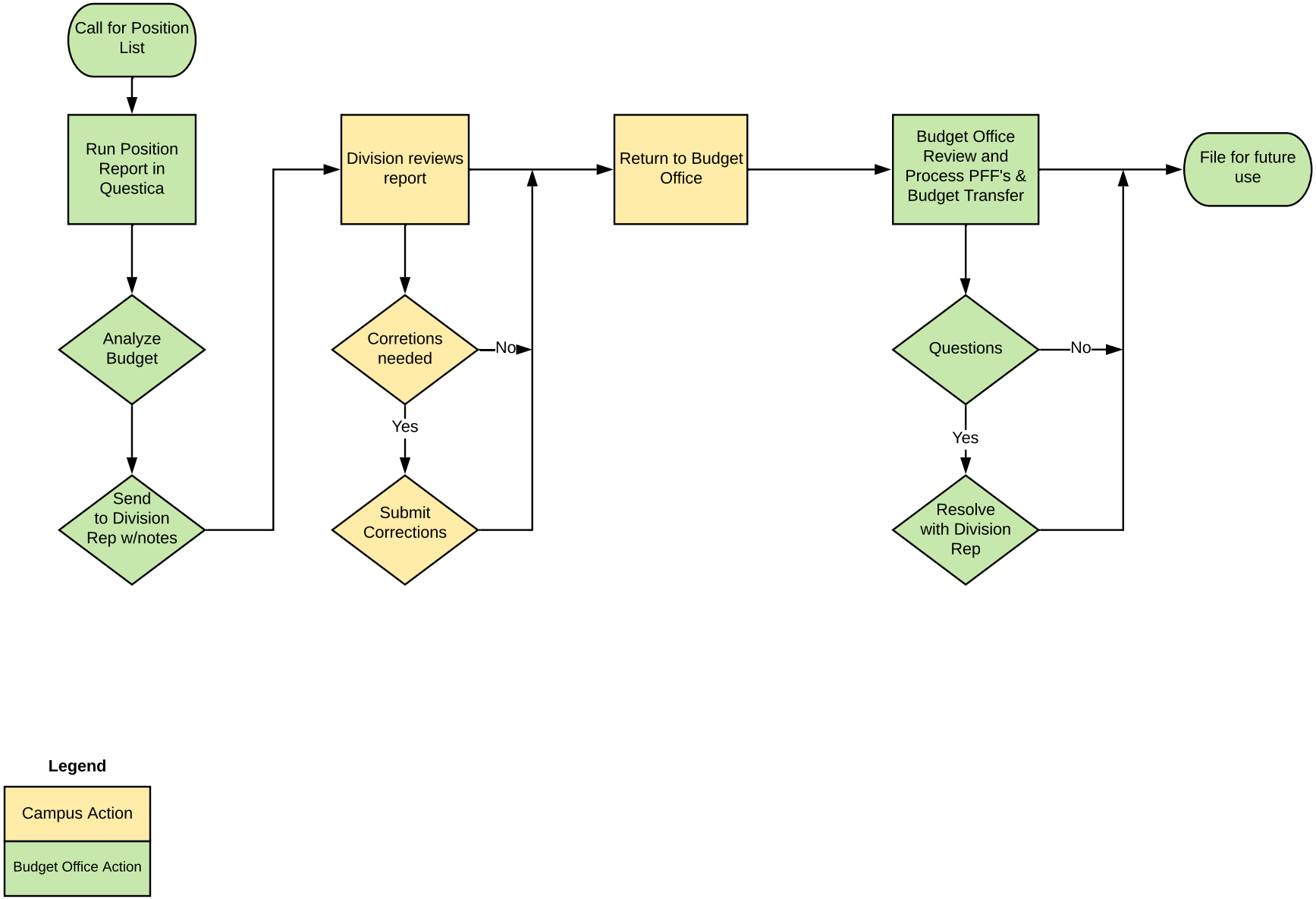
Overall, the current position management process is in urgent need of revision. Each year, countless hours are spent reviewing hundreds of lines of CMS and CFS data; comparing it to excel spreadsheets; making multiple and lengthy phone calls and edits; sending emails; generating multiple Position Funding Forms and Budget Transfers; then following up.

Historically, twice a year, this work has been performed by each divisional and college analyst as well as each member of the Budget Office including the Director. While some of the recommendations may be outside the scope of Questica, a great deal of time and effort could be saved if, in the Questica system, we could get current comprehensive position information that could be aggregated from campus wide down to departmental levels. In addition to saving time, this would enable better strategic planning capabilities that would be quicker and more accurate than what we currently have.

Appendix A

Current Position List Process Flow



Appendix B

Proposed Position List Process Flow