



BUDGET DEVELOPMENT QUESTICA PROCESS GUIDE

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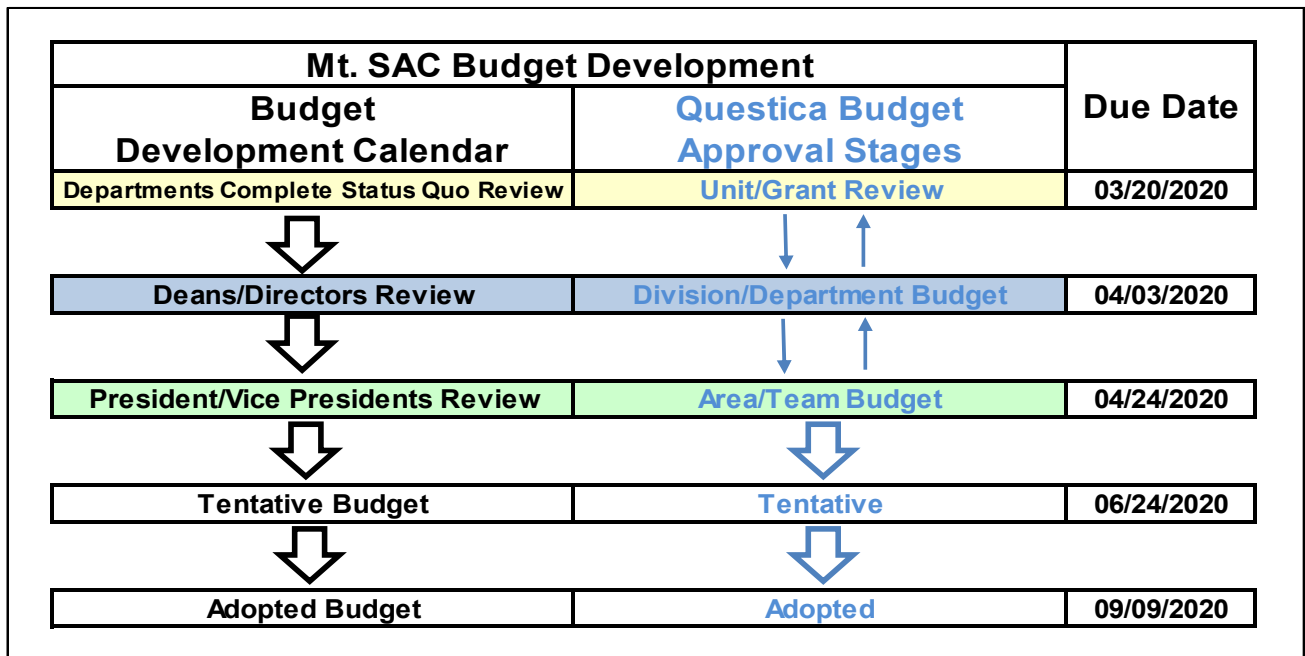
INTRODUCTION

Budget Development Using Questica Budget

Questica Budget is a web-based tool that enables many users to work together to prepare an “Operating” budget. An Operating budget includes the budget for the salaries and benefits as well as the operating costs such as supplies, services and other operating expenses, capital outlay, and other outgo. It keeps all the data in one place to avoid duplication and to ensure accuracy.

Budget Approval Process

Questica Budget users work with Organizations, each of which contain a piece of the budget. Users are assigned roles and Organization security for their areas of responsibility. The budget approval process is configured through hierarchal approval stages using the concepts of “Promotion” or “Demotion”. Promotion denotes approval to the next stage, and Demotion denotes return to the previous stage for additional changes. Users may be denied permission to make changes to budget data once the budget is promoted to the next stage. Eventually each Organization will reach a Stage where it is considered approved. These stages are Tentative and Adopted. The following illustrates the Mt. SAC’s approval stages aligned to the Questica Budget:



When the budgeting work reaches the Adopted stage, this data will be copied into the next Budget year to be used as the starting point.

Purpose of this Document

This manual will provide a guided tour of how to use the Questica budget software, particularly within the Analytics and Operating menus.

What is an Organization in Questica Budget when compared with the Banner Account Structure?

It is the combination of Mt SAC Banner account structure Fund and Org. For example, “11000-610000” Unrestricted General Fund-Fiscal Services. Please see the following crosswalk illustration:

**MT. SAC BANNER ACCOUNT STRUCTURE
VERSUS QUESTICA ACCOUNT STRUCTURE**

BANNER	Fund	Org	Account	Program	Activity
	11000	610000			

↓

Questica	Fund-Org	Account	Program	Activity
	11000-610000			

Reviewing and Developing your Budget

Reviewing and developing a budget in Questica involves four core tasks:

1. Go into the “Analytics” menu and run your reports.
2. Review your reports and determine your “Budget Changes”.
3. Go into the “Operating” menu and process your “Budget Changes”.
4. Once your budget review and changes are completed, then “Promote” the Organization to the next stage of review.

HOW TO LOG IN TO QUESTICA

Questica budget is a web-based application and requires that you use a browser (such as Internet Explorer or Chrome).

You must have a Mt. SAC Portal username and password. If you don't have them, please contact the IT Help Desk (Ext 4357).

1. Navigate to the Banner Home Page: banner.mtsac.edu and click on Questica icon.
2. Enter your Mt. SAC Portal username and password.
3. Click the sign in button to continue
4. If the login process is successful, the next page that appears will be the Questica homepage.

Mt. San Antonio College

BANNER OnBase Portal MtSAC

Production (PROD) -

- Banner 9 (Chrome browser recommended)
- Reports - ePrint / Argos / SSSP Support
- Degreeworks
- CCCApply Administrator
- CCCApply Report Center
- ODS Metadata

Testing (TEST) +

PreProduction (PPRD) +

Banner Testing (UPGR) +

Research +

Banner 9 is LIVE!

Check out the new features.

Request Forms -

New Banner and ARGOS project or report requests require the completion of a request form. Forms require the appropriate signatures and submitted to the Director, Enterprise Applications Systems in Information Technology. Submission of a request will require prioritization by the appropriate Banner Team Lead. Project work is scheduled based on established priorities and available resources.

Forms may be sent via email: eas-team@mtsac.edu

- Banner Security Class Maintenance
- Class Schedule Roll (SZRROLL)
- Datablock Request
- Project Request
- User Account Request Forms

Banner 8 (INB) +

Questica +



SIGN IN

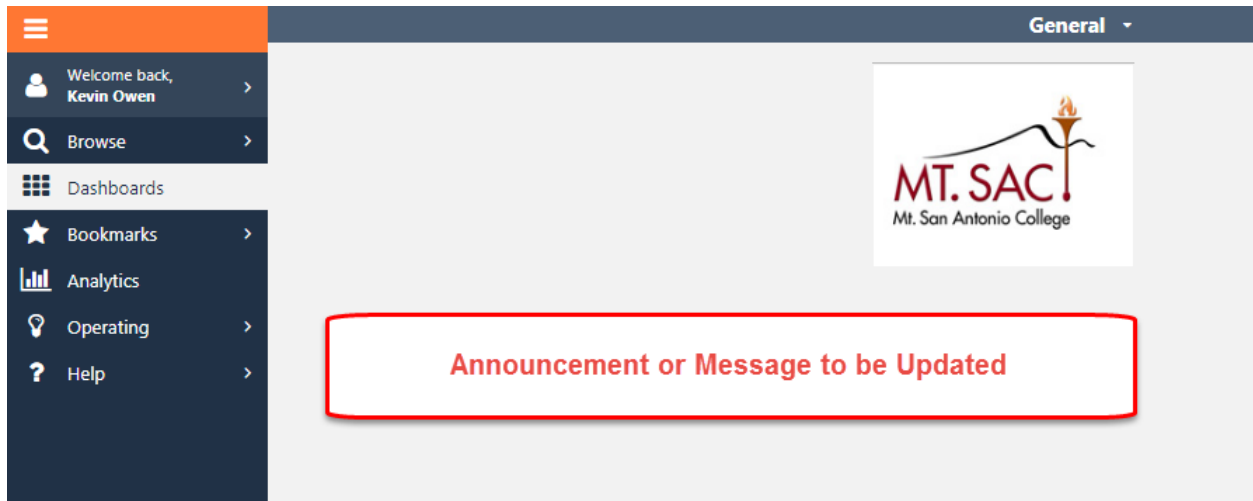
[Forgot Password](#)

[Forgot Username](#)

[1st Time Users \(Claim Account\)](#)

[Change Your Password](#)

QUESTICA HOME PAGE

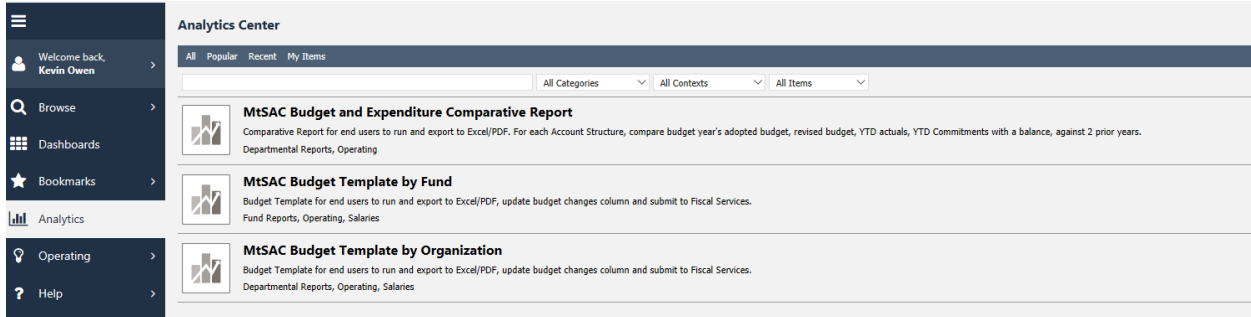


The following are brief summaries of the Menus:

Welcome back, Kevin Owen	Welcome back: You will see your name. User settings and Password change are found on this sections.
Browse	Browse: Google like search for what you want to look for.
Dashboards	Dashboard: Visual displays
Bookmarks	Bookmarks: Can be saved by each user.
Analytics	Analytics: Run and view reports.
Operating	Operating: Access organizations, enter budget changes, and promote organization budgets to next level.
Help	Help: Articles related to a particular page. Requires access to Questica Help with mtsac.edu email sign up.

ANALYTICS (RUN AND VIEW REPORTS)

There are three reports housed in this section:



1. MtSAC Budget Template by Organization

Mainly used for the Unrestricted General Fund Type 11. You will only be able to run reports for Fund and Organizations you have been granted access to under your area of responsibility.

To run the report:

- Click on the report, then
- Click on the “**Run Report**” button
- Report selection criteria will appear

From the drop down list select the following:

- Budget Year:** Budget Development year
- Fund Type:** 11 – General Fund – Unrestricted
- Fund:** Check All
- Org Security:** Check All
- Organization:** Check All
- Click on the “**Run Report**” button

Auto-Fill: Custom... ▼

Budget Year: 2019-20 ▼


Fund Type: 20 selected ▼

Fund: 1548 selected ▼

Area/Team: 9 selected ▼

Org Security: 22 selected ▼

Organization: 9 selected ▼

Run Report 

The report will display to the right of the selection criteria menu

MT. SAN ANTONIO COLLEGE														
2019-20 BUDGET TEMPLATE BY ORGANIZATION														
Organization: 670000 - Event Services														
Fund	Org	Acct	Prog	Actv	Account Description	Organization Description	FTE	Range	Acct %	Salary	Adopted Budget 2018-19	Status Quo Budget 2019-20	Budget Changes 2019-20	Revised Status Quo Budget 2019-20
Expenses														
11000	670000	211000	813000	2100	Classified Salaries-Unit A	Event Services					0	24,602	0	24,602
					CA9290Administrative Specialist I		0.48	CA00089	47.50	24,602				
11000	670000	211000	883000	2100	Classified Salaries-Unit A	Event Services					222,432	287,915	0	287,915
					CA9986 Babich, Thomas		0.10	CA00118	100.00	11,783				
					CA9952 Catingub, Deborah		0.20	CA00075	100.00	13,833				
					CA9893 Cole, Shaun		1.00	CA00088	100.00	52,831				
					CA9903 Friesen, James		1.00	CA00089	100.00	79,506				
					CA9807 Garcia, Yvette		1.00	CA00088	100.00	65,440				
					CA9972 Puentes, Dalia		0.50	CA00088	100.00	36,218				
					CA9543 Watkins, Sandra		0.43	CA00089	42.50	28,524				
11000	670000	215000	883000	2100	Classified Admin Salaries	Event Services					117,013	113,910	0	113,910
					MC9934 Owen, Kevin		0.50	AD00017	100.00	80,733				
					MC9992Director, Technical Services		0.20	AD00021	100.00	33,177				
11000	670000	231000	883000	2100	Short-Term, Nonacad Salaries	Event Services					27,490	23,810	0	23,810
11000	670000	232000	883000	2100	Professional Expert Salaries	Event Services					34,889	34,889	0	34,889
11000	670000	238000	883000	2100	Overtime, Noninstructional	Event Services					20,000	20,000	0	20,000
11000	670000	321000	883000	2100	PERS Budget Holding	Event Services					0	67,292	0	67,292
11000	670000	331000	883000	2100	OASDI, Budget Holding	Event Services					0	23,143	0	23,143
11000	670000	335000	813000	2100	Medicare, Budget Holding	Event Services					0	387	0	387
11000	670000	335000	883000	2100	Medicare, Budget Holding	Event Services					0	5,840	0	5,840
11000	670000	351000	813000	2100	State Unemploy Budget Holding	Event Services					0	12	0	12
11000	670000	351000	883000	2100	State Unemploy Budget Holding	Event Services					0	201	0	201
11000	670000	361000	813000	2100	W/C Budget Holding	Event Services					0	340	0	340
11000	670000	361000	883000	2100	W/C Budget Holding	Event Services					0	5,545	0	5,545
11000	670000	371000	813000	2100	CIL Budget Holding	Event Services					0	500	0	500
11000	670000	371000	883000	2100	CIL Budget Holding	Event Services					0	49,180	0	49,180
11000	670000	381000	813000	2100	Alternative Retire Plan Budget Hold	Event Services					0	738	0	738
11000	670000	381000	883000	2100	Alternative Retire Plan Budget Hold	Event Services					0	858	0	858
11000	670000	451000	883000		Supplies	Event Services					8,000	8,000	0	8,000
11000	670000	561000	883000		Contracted Services	Event Services					60,250	60,250	0	60,250
11000	670000	564000	883000		Repairs	Event Services					2,115	2,115	0	2,115
11000	670000	584000	883000		Computer/Technlgy Related Serv	Event Services					1,473	1,473	0	1,473
11000	670000	841200	883000		New Equipment-\$500 to \$999	Event Services					1,887	1,887	0	1,887
11150	670000	521000	883000		Travel and Conferences	Event Services					1,400	1,400	0	1,400
11900	670000	521000	883000		Travel and Conferences	Event Services					4,646	0	0	0
11900	670000	561000	883000		Contracted Services	Event Services					114,854	0	0	0
11900	670000	584000	883000		Computer/Technlgy Related Serv	Event Services					188	0	0	0
11908	670000	841400	883000		New Equipment-Over \$5K	Event Services					65,100	0	0	0
11912	670000	232000	883000	2100	Professional Expert Salaries	Event Services					61,962	0	0	0
11912	670000	321001	883000	2100	PERS Budget Holding	Event Services					9,624	0	0	0
11912	670000	331001	883000	2100	OASDI, Budget Holding	Event Services					3,842	0	0	0
11912	670000	335001	883000	2100	Medicare, Budget Holding	Event Services					898	0	0	0
11912	670000	351001	883000	2100	State Unemploy Budget Holding	Event Services					31	0	0	0
11912	670000	361001	883000	2100	W/C Budget Holding	Event Services					985	0	0	0
Expenses Total											758,857	734,045	0	734,045

The report could be downloaded in excel or PDF format by clicking in the download icon located in the top middle of the screen.



The screenshot shows a web application interface for budget reports. At the top, there is a navigation bar with a search box and a 'Find | Next' button. Below this, the report title 'MT. SA 2019-20 BUI' is displayed. A dropdown menu is open, showing options for file formats: Word, Excel, PowerPoint, PDF, TIFF file, MHTML (web archive), CSV (comma delimited), XML file with report data, and Data Feed. A red arrow points to the 'Excel' option. Below the menu, a table of budget data is visible, with columns for Fund, Org, Acct, Prog, Actv, Account Description, Organization, Range, Acct %, Salary, Adopted Budget 2018-19, Status Quo Budget 2019-20, Budget Changes 2019-20, and Revised Status Quo Budget 2019-20.

Fund	Org	Acct	Prog	Actv	Account Description	Organization	Range	Acct %	Salary	Adopted Budget 2018-19	Status Quo Budget 2019-20	Budget Changes 2019-20	Revised Status Quo Budget 2019-20
11000	870000	211000	813000	2100	Classified Salaries-Unit A	Event Services				0	24,602	0	24,602
11000	870000	211000	883000	2100	Classified Salaries-Unit A	Event Services	0.48	CA00089	47,50	222,432	287,915	0	287,915
					CA9290Administrative Specialist I								
					CA9988 Babich, Thomas		0.10	CA00118	100.00				
					CA9952 Catingub, Deborah		0.20	CA00075	100.00				
					CA9893 Cole, Shaun		1.00	CA00088	100.00				
					CA9999 Cole, Shaun		1.00	CA00088	100.00				

2. MtSAC Budget Template by Fund

Mainly used for all other Fund Types, except the Unrestricted General Fund Type 11.

To run the report:

Click on the report, then

Click on the **“Run Report”** button

Report selection criteria will appear

From the drop down list select the following:

Budget Year: Budget Development year

Fund Type: Select Fund Type

Fund: Select Fund

Area/Team: Check All

Org Security: Check All

Click on the **“Run Report”** button

The report could be downloaded in excel or PDF format by clicking in the download icon located in the top middle of the screen.



**MT. SAN ANTONIO COLLEGE
2019-20 BUDGET TEMPLATE BY FUND**

Fund Type: 13 - General Fund - Unrestricted Rev Gen

Fund: 13674 - Campus Facility Rentals

Fund	Org	Acct	Prog	Actv	Account Description	Organization Description	FTE	Range	Acct %	Salary	Adopted Budget 2016-19	Status Quo Budget 2019-20	Budget Changes 2019-20	Revised Status Quo Budget 2019-20
Expenses														
13674	674000	231000	683000	2100	Short-Term, Nonacad Salaries	Campus Facility Rentals					15,000	0	0	0
13674	674000	232000	683000	2100	Professional Expert Salaries	Campus Facility Rentals					25,000	0	0	0
13674	674000	236000	683000	2100	Overtime, Noninstructional	Campus Facility Rentals					35,000	0	0	0
13674	674000	331000	683000	2100	OASDI, Budget Holding	Campus Facility Rentals					4,850	0	0	0
13674	674000	335000	683000	2100	Medicare, Budget Holding	Campus Facility Rentals					1,120	0	0	0
13674	674000	351000	683000	2100	State Unemploy Budget Holding	Campus Facility Rentals					39	0	0	0
13674	674000	381000	683000	2100	WIC Budget Holding	Campus Facility Rentals					1,035	0	0	0
13674	674000	381000	683000	2100	Alternative Retire Plan Budget Hold	Campus Facility Rentals					2,250	0	0	0
13674	674000	451000	683000		Supplies	Campus Facility Rentals					1,000	0	0	0
13674	674000	581000	683000		Contracted Services	Campus Facility Rentals					1,000	0	0	0
13674	674000	583000	683000		Equipment Rental and Leases	Campus Facility Rentals					10,000	0	0	0
13674	674000	589000	683000		Other Services	Campus Facility Rentals					74,568	0	0	0
Expenses Total											170,862	0	0	0
Net Total											170,862	0	0	0

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2019-20 BUDGET TEMPLATE BY FUND

Page 1

3. MtSAC Budget and Expenditure Comparative Report

The purpose of this report is to facilitate the analysis of budget areas that may need to be realigned with actual expenditures. This report includes only the ongoing budget and expenditure account information for the Fund Type 11 – Unrestricted General Fund. The report will display budget and actuals for fiscal years 2017-18 and 2018-19; and budget, actuals, and commitments (requisitions, purchase orders, and purchase orders change notices) for the fiscal year 2019-20 as of February 26, 2020. The history of each account is presented in chronological order. For updated information on account balances, please access the form FGIBDST (Organization Budget Status) in the Banner System.

To run the report:

- Click on the report, then
- Click on the **“Run Report”** button
- Report selection criteria will appear

From the drop down list select the following:

- Budget Year:** Current year Fiscal Year
- Report End Date:** Current month

All other selection are preselected for you

Click on the **“Run Report”** button

Use the reports of your choice to determine your budget changes:

You may download the reports on the format of your choice (Excel or PDF) and determine the budget changes needed to realign your budgets with planned expenditures. The procedures for budget changes are explained in the next section.

CHANGE REQUEST – BUDGET CHANGES

This process is used by budget managers to make changes to their budget line items. Has built in business rules that align with College policies and keep the budget in balance. Budget line item changes must net to zero. **For a list of common business rules refer to Appendix A.**

To process a budget change, go to the **Operating** menu

Select **Change Requests**

The screenshot displays a web application interface. On the left is a dark blue sidebar with a menu. The 'Operating' menu item is highlighted in orange, and its dropdown list is open, showing various options with search icons. 'Change Requests' is highlighted in yellow. The main content area is titled 'Change Requests' and includes a 'Budget Year' dropdown set to '2019-20', a search bar, and a table with columns for 'Budget Year' and 'Change Request Type'.

	Budget Year	Change Request Type	...
--	-------------	---------------------	-----

Budget Year: ensure that you are in the **Fiscal Year** for the budget you are developing.

Click on **+Add Change Request**

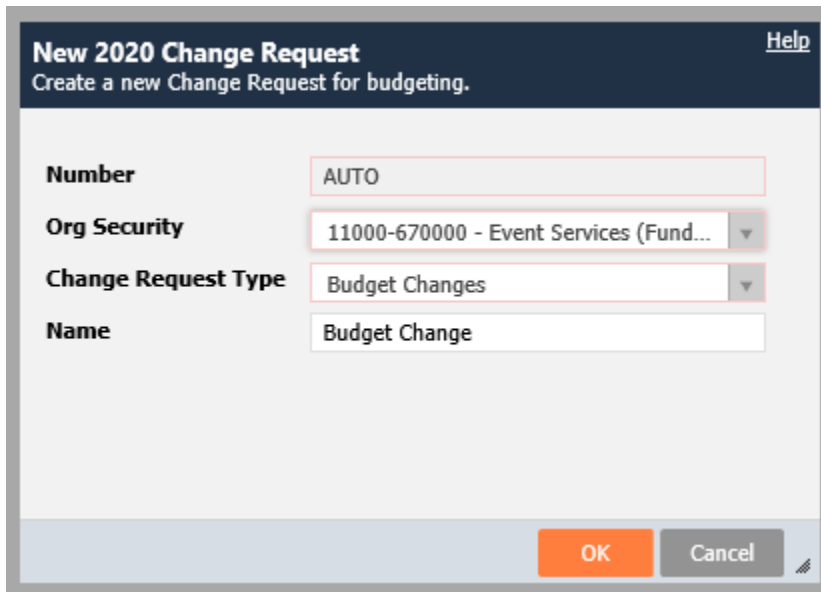


Enter the **Org Security** for the Change Request to be processed

Select Change Request Type: **Budget Changes**

Under Name: Include Type "**Budget Change**"

Click the **OK** button to finish creating the Change Request. This will open another window tab.

A screenshot of a dialog box titled "New 2020 Change Request" with a "Help" link in the top right corner. The dialog contains the instruction "Create a new Change Request for budgeting." and four input fields: "Number" with the value "AUTO", "Org Security" with a dropdown menu showing "11000-670000 - Event Services (Fund...)", "Change Request Type" with a dropdown menu showing "Budget Changes", and "Name" with the value "Budget Change". At the bottom of the dialog are "OK" and "Cancel" buttons.

From the menu on the Left go to:

General-Change Request and complete the following information.

Description: Enter Fund Number and Fund Description (Name)

Comments: Information about the Grant or Fund

Example: Contract Year 1 of 3

Justification: Reason for change

Example: 95% of Contract, or

Example: Grant Closed

The screenshot shows a web application interface for managing change requests. The top navigation bar includes 'File', 'Change Request', 'Scenario', 'Reports', 'Tools', and 'Help'. The left sidebar menu is categorized into 'General', 'Operating', 'Capital', and 'Other'. The 'Change Request' option under 'General' is highlighted in orange. The main content area displays 'Change Request Information' for a specific request. The fields are as follows:

2019-20		2020-743079 - Budget Increase - Main (Published)	
Name	Budget Increase		
Number	2020-743079	Change Request Type	Fiscal Budget Creation
		Publish Date	2019-02-11
Description	Fund 13655-Employee Health and Welfare		
Comments	Contract Year 1 of 3		
Justification	95% of Contract		
Org Security	13655-650500 - Employee Health and Wellness (Fund 13655)		

Under Operating-Operating Changes

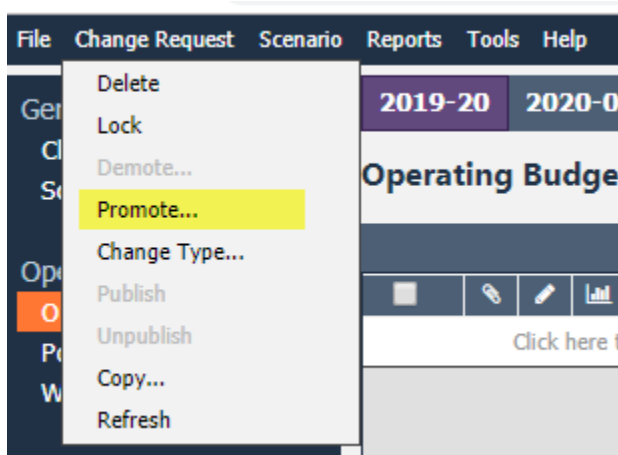
You can enter budget lines changes in the top row of the grid.

- Enter the Organization (Fund-Org), Account, Program or select them from the drop down list. *(Note: the Activity Field will default based on the Account Code selected)*
- Leave the Description field blank.
- Click on the “**One Time**” button if the change is valid only for the Budget Year.
- Do not click on the “**One Time**” button if this is an ongoing change. This means that the account will be permanently changed from this point forward.
- Enter the amount of the budget line change under the Budget Year Field. To decrease the budget line enter a minus (-).
- To add a line click the Tab key on your keyboard.

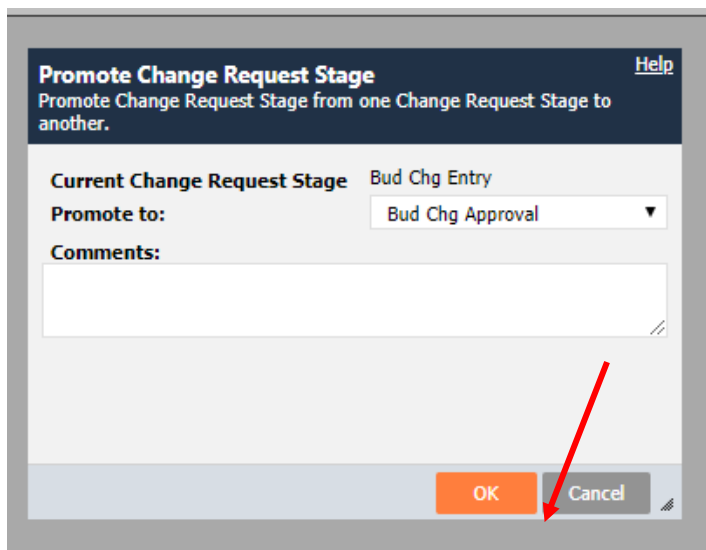
2019-20		2020-765948 - Budget Change - Main		Change Request Stage: Bud Chg Entry [Budget Chang			
Operating Budget							
Note: Budget Change must be in Balance. Change should net to zero.							
Account Structure	Organization	Account	Program	Activity	Description	One Time	2020
Account Type: Expenses							
11000-610000-451000-672000-	11000-610000 - Fiscal Services	451000 - Supplies	672000 - Fiscal Operations			✓	(500)
11000-610000-589000-672000-	11000-610000 - Fiscal Services	589000 - Other Services	672000 - Fiscal Operations			✓	500

After completing your budget changes you will need to Promote the change request, then Publish (This will post the entry and adjust your budget).

Go to the **Change Request** menu on the top ribbon and select Promote from the drop down menu.



Click **OK**



Go to Change Request on the top ribbon under and select Publish from the drop down menu.

Click **OK**.

ORGANIZATIONS SEARCH (DETERMINE APPROVAL STAGE)

To determine the **approval stage** of your Organizational budget(s):

Go to the **Operating** menu

Select **Organizations**

Budget Year: Select the fiscal year for the budget being developed

- To search for a specific Fund, Org, or Fund-Org combination. Enter the number or description in the search box next to the Search button.
- To view all your organizations do not enter a value in the search box (leave blank) and click on the Search button.

The screenshot shows the 'Organizations' search interface. On the left, a dark sidebar contains a menu with 'Operating' highlighted. The main content area has a header 'Organizations' and a 'Budget Year' dropdown set to '2019-20'. Below this is a search box containing '11000-670000', a 'Search' button, and an 'Advanced' dropdown. A table below the search area has columns for 'Fund', 'Org Security', and 'Fund-Org'.

Specific Fund-Org: The approval stage will display

The screenshot shows the 'Organizations' search interface with a specific result. The search box contains '11000-670000'. The table below has columns for 'Fund', 'Org Security', 'Fund-Org', 'Name', 'Stage', and 'Status'. The 'Stage' column for the 'Event Services' row is circled in red and contains the text 'Unit/Grant Review'.

Fund	Org Security	Fund-Org	Name	Stage	Status
11000 - Unrestricted General Fun...	11000-670000 - Event Services (Fund 11000)	11000-670000	Event Services	Unit/Grant Review	Active

Leaving the window blank: The approval stage will display for all Organizational budgets under your security access.

Organizations

Budget Year: 2019-20

Search Advanced

Fund	Org Security	Fund-Org	Name	Stage	Status
13675 - Box Office	13675-675000 - Box Office (Fund 13675)	13675-675000	Box Office	Unit/Grant Review	Active
13675 - Box Office	13675-675950 - Box Office-Concessions (Fund 13675)	13675-675950	Box Office-Concessions	Unit/Grant Review	Active
13675 - Box Office	13675-675002 - Box Office-Dance Maker (Fund 13675)	13675-675002	Box Office-Dance Maker	Unit/Grant Review	Active
11000 - Unrestricted General Fun...	11000-672000 - Broadcast and Presentation Servs (Fund 11...	11000-672000	Broadcast and Presentation Servs	Unit/Grant Review	Active
11150 - Conference/Travel-Mgmt...	11150-672000 - Broadcast and Presentation Servs (Fund 11...	11150-672000	Broadcast and Presentation Servs	Unit/Grant Review	Active
11900 - Unrestricted Genera Fun...	11900-672000 - Broadcast and Presentation Servs (Fund 11...	11900-672000	Broadcast and Presentation Servs	Unit/Grant Review	Active
11907 - FY 15-16 New Resourc...	11907-672000 - Broadcast and Presentation Servs (Fund 11...	11907-672000	Broadcast and Presentation Servs	Unit/Grant Review	Active
17800 - Lottery-Restricted	17800-672000 - Broadcast and Presentation Servs (Fund 17...	17800-672000	Broadcast and Presentation Servs	Unit/Grant Review	Active
11913 - FY 17-18 New Resourc...	11913-672000 - Broadcast and Presentation Servs (Fund 11...	11913-672000	Broadcast and Presentation Servs	Unit/Grant Review	Active
13674 - Campus Facility Rentals	13674-674000 - Campus Facility Rentals (Fund 13674)	13674-674000	Campus Facility Rentals	Unit/Grant Review	Active
11000 - Unrestricted General Fun...	11000-670000 - Event Services (Fund 11000)	11000-670000	Event Services	Unit/Grant Review	Active
11900 - Unrestricted General Fun...	11900-670000 - Event Services (Fund 11900)	11900-670000	Event Services	Unit/Grant Review	Active
11908 - FY 15-16 New Resourc...	11908-670000 - Event Services (Fund 11908)	11908-670000	Event Services	Unit/Grant Review	Active

The search window works a lot like a Google search. Type in words or numbers and Qestica Budget will search all the information on the Organization to find a match. Add more search terms to narrow down your search. If you enter a phrase in quotation marks, Qestica Budget will search for the phrase. For example, if you include the word "event", then only Organizations with the word "event" will display.

Organizations

Budget Year: 2019-20

event Search Advanced

Fund	Org Security	Fund-Org	Name	Stage	Status
11000 - Unrestricted General Fun...	11000-670000 - Event Services (Fund 11000)	11000-670000	Event Services	Unit/Grant Review	Active
11900 - Unrestricted General Fun...	11900-670000 - Event Services (Fund 11900)	11900-670000	Event Services	Unit/Grant Review	Active
11908 - FY 15-16 New Resourc...	11908-670000 - Event Services (Fund 11908)	11908-670000	Event Services	Unit/Grant Review	Active
11912 - FY 17-18 New Resourc...	11912-670000 - Event Services (Fund 11912)	11912-670000	Event Services	Unit/Grant Review	Active
11150 - Conference/Travel-Mgmt...	11150-670000 - Event Services (Fund 11150)	11150-670000	Event Services	Unit/Grant Review	Active
11913 - FY 17-18 New Resourc...	11913-670000 - Event Services (Fund 11913)	11913-670000	Event Services	Unit/Grant Review	Active

PROMOTING/DEMOTING ORGANIZATIONS

When you have finished making all changes to your organizational budgets, the next step is to “Promote” it to the next stage, to be reviewed by the next level. Once the Organization is promoted to the next stage, you will not be able to edit it; unless, the next level reviewer “Demotes” it back to your level.

Promoting a Single Organization

Under the **Operating** menu

Select **Organization**

The screenshot shows a user interface for managing organizations. On the left, a dark sidebar contains a menu with items: 'Welcome back, Marisa Ziegenhohn', 'Browse', 'Dashboards', 'Bookmarks', 'Analytics', 'Operating' (highlighted in orange), and 'Capital'. The main area is titled 'Organizations' and includes a 'Budget Year' dropdown set to '2019-20', a search input field, and 'Search' and 'Advanced' buttons. Below this is a table with columns 'Fund' and 'Org Security'. A search dropdown menu is open, listing 'Explorer', 'Organizations' (highlighted in orange), 'Scenarios', 'Position Allocations', 'Budget Lines', 'Actual Costs', and 'Change Requests'. Each item in the dropdown has a magnifying glass icon to its right.

Search for the Organization (either by Fund-Org number or description)

Double click on selected **Org Security**

Organizations

Budget Year

<input type="checkbox"/>	Fund	Org Security	▲ Fund-Org	Name
<input type="checkbox"/>	13110 - College Improve...	13110-100000 - President (Fun...	13110-10...	President

From the top ribbon under **Organization** select Promote from the drop down menu.

The screenshot shows the Qwestica software interface. At the top, there is a menu bar with 'File', 'Organization', 'Scenario', 'Reports', 'Tools', and 'Help'. Below the menu bar, the 'Organization' ribbon is active, showing '2019-20' and '13110-100000 - President - Main'. A context menu is open over the '13110-100000 - President - Main' item, with 'Promote...' highlighted in orange. Other menu items include 'Delete', 'Lock', 'Demote...', 'Copy...', 'Set Previous...', and 'Open Year'. The main content area displays 'Getting Started with Qwestica Dashboards' with a quote from Steven Few and instructions on how to create a new dashboard.

Demoting a Single Organization

Under the **Operating** menu

Select **Organization**

The screenshot shows the 'Organizations' page. The left sidebar has a menu with 'Operating' highlighted. The main area has a search bar with '13110-100000' and a table with columns 'Fund', 'Org Security', 'Fund-Org', and 'Name'. A dropdown menu is open over the search bar, listing various options like 'Organizations', 'Scenarios', 'Position Allocations', 'Budget Lines', 'Actual Costs', and 'Change Requests'.

Search for the Organization (either by Fund-Org number or name)

Double click on selected **Org Security**

The screenshot shows the 'Organizations' page with a search result. The search bar contains '13110-100000'. The table below has columns 'Fund', 'Org Security', 'Fund-Org', and 'Name'. A red arrow points to the 'Org Security' column of the first row, which contains '13110-100000 - President (Fun...'.

	Fund	Org Security	Fund-Org	Name
<input type="checkbox"/>	13110 - College Improve...	13110-100000 - President (Fun...	13110-10...	President

In the top ribbon under **Organization** drop down menu select **Demote...**



Batch Process Promotion or Demotion

Recommended for Funds with multiple orgs. This batch process automates promoting and demoting of many Organization at once.

Under the **Operating** menu

Select **Batch Process**

Then, select **Promote/Demote Organization**

The screenshot shows a dark-themed navigation sidebar on the left. The 'Operating' menu item is highlighted in orange. A sub-menu is open, listing various options. The 'Batch Processes' option is highlighted in orange, and its sub-menu is also open, showing 'Promote/Demote Organizations' as the selected option. The background shows a blurred view of a document or report.

Operating	Explorer
	Organizations
	Scenarios
	Position Allocations
	Budget Lines
	Actual Costs
	Change Requests
	Change Request Budget Lines
	Allocations
	Statistical Forecasts
	Statistical Actuals
	Global Variables
Batch Processes	Promote/Demote Organizations

Search for **Fund** you want to promote

Use the check boxes to select the ones you wish to promote or demote.

At the bottom, select the action of promote or demote and which stage you wish to promote or demote to.

Click the **Start** button

Promote/Demote Organizations

Budget Year: 2019-20

17540 Search Advanced

<input type="checkbox"/>	Fund	Org Security	Fund-Org	Name	Stage	Status	Deny Budg
<input type="checkbox"/>	17540 - EOPS-19/20	17540-523000 - EOPS (Fund 17540)	17540-523000	EOPS	Fiscal Status Quo	Active	
<input type="checkbox"/>	17540 - EOPS-19/20	17540-902500 - Federal Work Study (Fund 17540)	17540-902500	Federal Work Study	Fiscal Status Quo	Active	

Action: Promote Items To Status Quo Review

Promote/Demote Comments:


Start

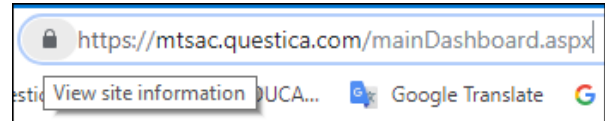
ALLOW POP-UPS IN CHROME FOR QUESTICA

There are functions in Questica that, when used, will need to open in a new window. One example is the creation of a change order. Questica needs to have Chrome set to allow pop-ups for this application. It is also wise to have Windows trust Questica.

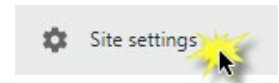
Follow these instructions in Chrome to allow pop-ups from Questica:

Open Chrome and log into Questica.

Click the  icon, located to the left of Questica's URL in the address bar.



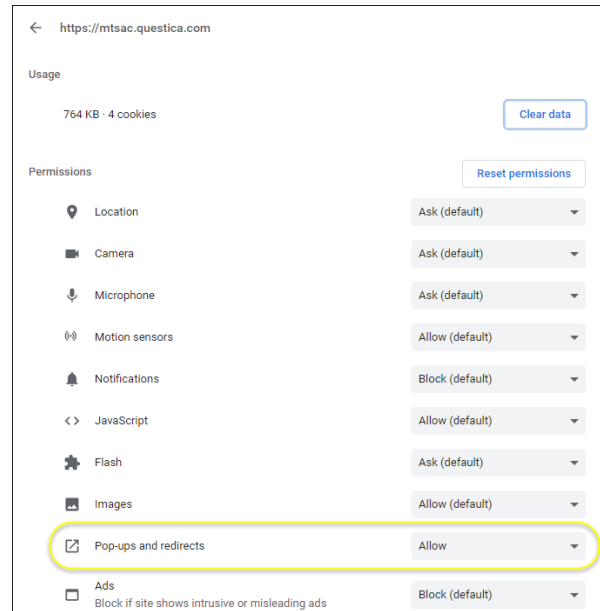
Select Site Settings in the drop-down that opens.



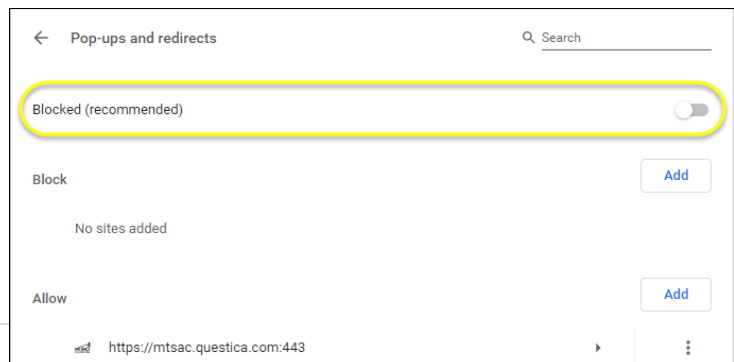
In the site settings list, find Pop-ups and redirects.

Select Allow in the drop-down across from Pop-ups and redirects.

Want to try it another way? If you see **"Pop up blocked"** appear in the address bar when you navigate to the site, click it. Then, click the link for the pop-up you want to see. Finally, select **"Always allow pop-ups and redirects from [site]"**, and then click Done to save the change.



Allowing pop-ups specifically for Questica will enable the site to open new windows as needed. You can continue to protect your Chrome browser from unwanted pop-ups by keeping the general pop-up setting set to **Blocked**.



APPENDIX A

Business Rules For “Budget Changes”

1. Accounts must be within the following ranges:
 - 140000-149999 Hourly Non Inst
 - 230000-249999 short Term OT
 - 260000-269999 Short Term OT
 - 400000-769999 Supplies and Operating
2. Budget Change should be within the same Fund
3. Process Budget Changes in whole dollars
4. Net balance must equal zero
5. Travel and conference for Faculty account 525000 is contractual. Switches form one Org to another Org are allowed as long as the account remains under 525000 and has an instructional program code (000000 to 499999).
6. Book rentals for instructional Programs account 563200 is contractual. Switches form one Organization to another Organization are allowed as long as the account remains under 5632000 and has an instructional program code (000000 to 499999)
7. Instructional service agreements for Instructional programs account 561800 is contractual. Switches form one Organization to another Organization are allowed as long as the account remains under 561800 and has an instructional program code (000000 to 499999)