



# BUDGET DEVELOPMENT QUESTICA PROCESS GUIDE

For questions email: [budgetdevelopment@mtsac.edu](mailto:budgetdevelopment@mtsac.edu)

Maria Correia  
Kasteel Gumban  
Alsace Kam  
Maria Kline  
Christine Lam  
Kim Leisure  
Melanie Lazo  
Catherine Nguyen  
Suzanne Ponce  
Yvette Shane  
Kevin Truong  
Emma Valenzuela  
Marisa Ziegenhohn

[mcorreia1@mtsac.edu](mailto:mcorreia1@mtsac.edu)  
[kgumban@mtsac.edu](mailto:kgumban@mtsac.edu)  
[akam1@mtsac.edu](mailto:akam1@mtsac.edu)  
[mcline@mtsac.edu](mailto:mcline@mtsac.edu)  
[clam@mtsac.edu](mailto:clam@mtsac.edu)  
[kleisure@mtsac.edu](mailto:kleisure@mtsac.edu)  
[mlazo1@mtsac.edu](mailto:mlazo1@mtsac.edu)  
[cnguyen15@mtsac.edu](mailto:cnguyen15@mtsac.edu)  
[sponce10@mtsac.edu](mailto:sponce10@mtsac.edu)  
[yshane@mtsac.edu](mailto:yshane@mtsac.edu)  
[ktruong36@mtsac.edu](mailto:ktruong36@mtsac.edu)  
[evalenzuela@mtsac.edu](mailto:evalenzuela@mtsac.edu)  
[mziegenhohn@mtsac.edu](mailto:mziegenhohn@mtsac.edu)

## TABLE OF CONTENTS

| Sections  | Page No. |
|---|----------|
| Introduction                                    | 1        |
| How to log in to Questica                       | 3        |
| Questica Home Page                              | 4        |
| Analytics (Run and View Reports)                | 5        |
| Change Request – Budget Changes                 | 9        |
| Organizations Search (Determine Approval Stage) | 13       |
| Promoting/Demoting Organizations                | 15       |
| Allow Pop-ups in Chrome for Questica            | 20       |
| Appendix A                                      | 21       |



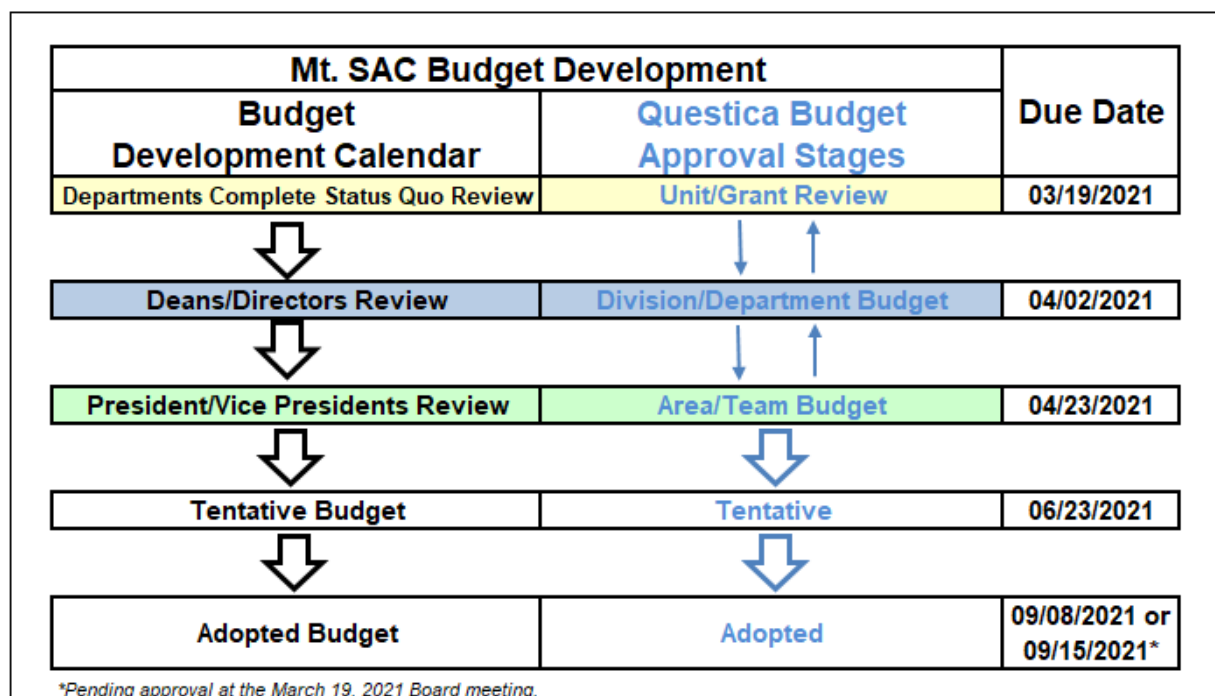
## INTRODUCTION

### 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 Mt. SAC’s approval stages aligned to the Questica Budget:



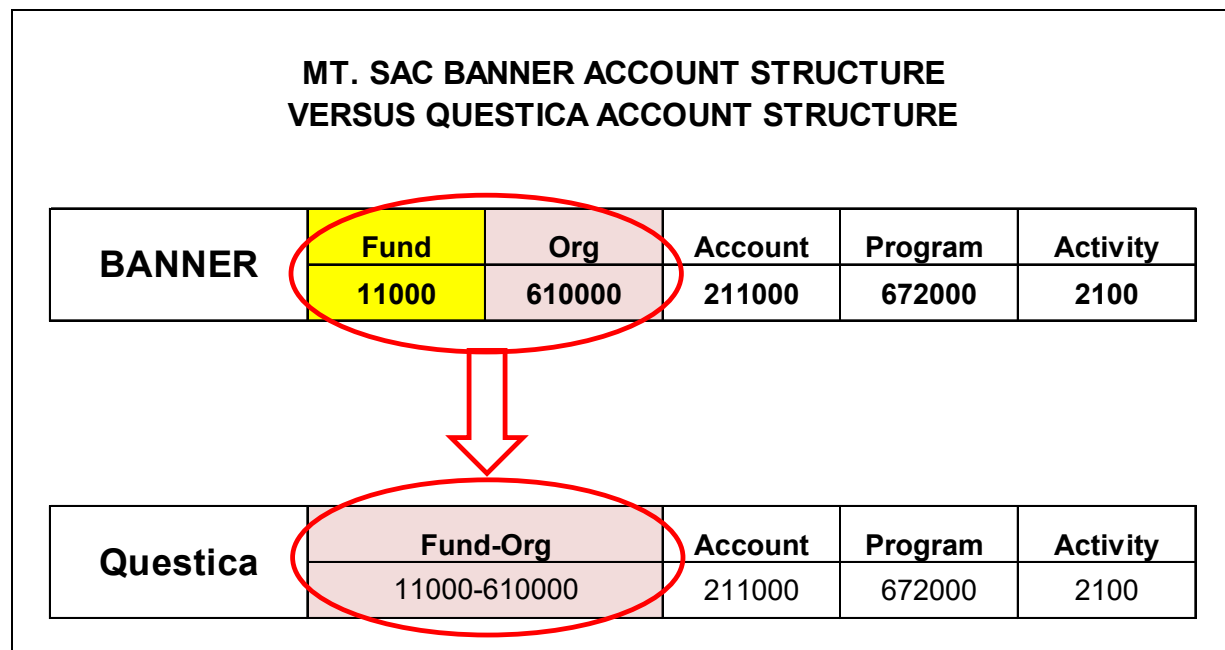
When the budgeting work reaches the Adopted stage, this data will be copied into the next Budget year to be used as the starting point.

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



## 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 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](http://banner.mtsac.edu) and click the 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

BANNEROnBasePortalMtSAC

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](mailto:eas-team@mtsac.edu)

Banner Security Class Maintenance

Class Schedule Roll (SZRRoll)

Datablock Request

Project Request

User Account Request Forms

Banner 8 (INB)

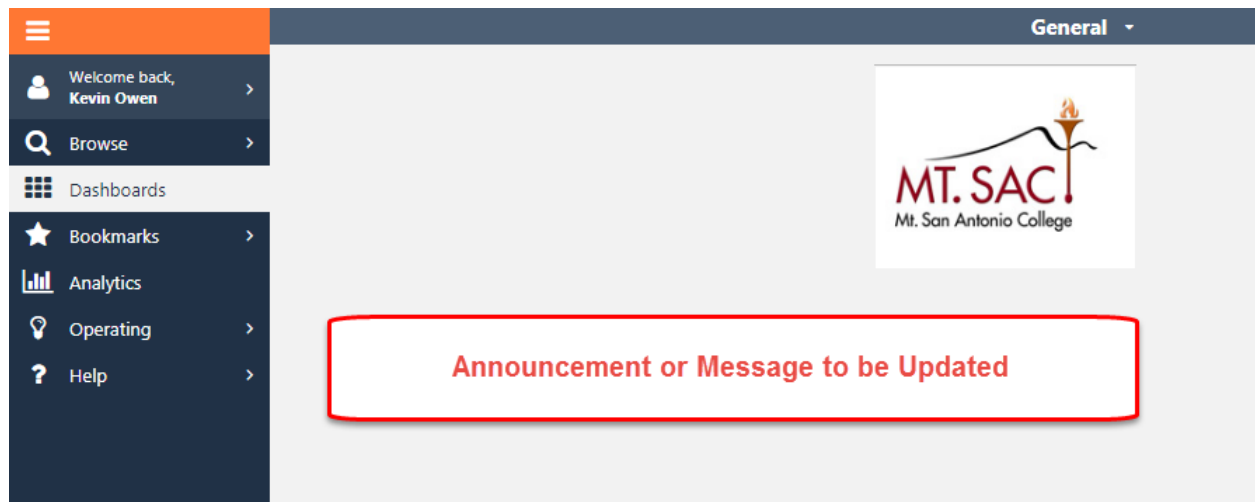
+

Questica








+

3 | Page

## QUESTICA HOME PAGE

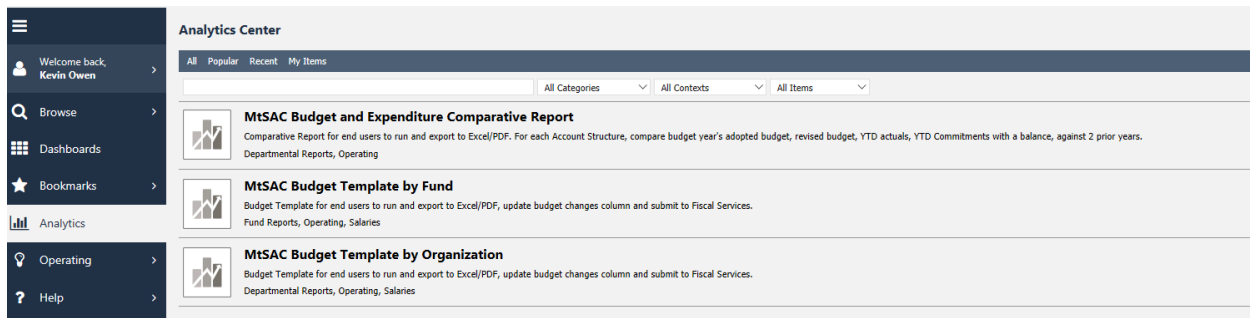


The following are brief summaries of the Menus:

|   |   |
|---|---|
|  Welcome back, Kevin Owen | Welcome back: You will see your name.<br>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

The screenshot shows a form for selecting report criteria. It has a header 'Auto-Fill:' with a 'Custom...' dropdown. Below are six rows, each with a label and a dropdown menu: 'Budget Year:' (2019-20), 'Fund Type:' (20 selected), 'Fund:' (1548 selected), 'Area/Team:' (9 selected), 'Org Security:' (22 selected), and 'Organization:' (9 selected). At the bottom is a large orange button labeled 'Run Report' and a small icon of a floppy disk.

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



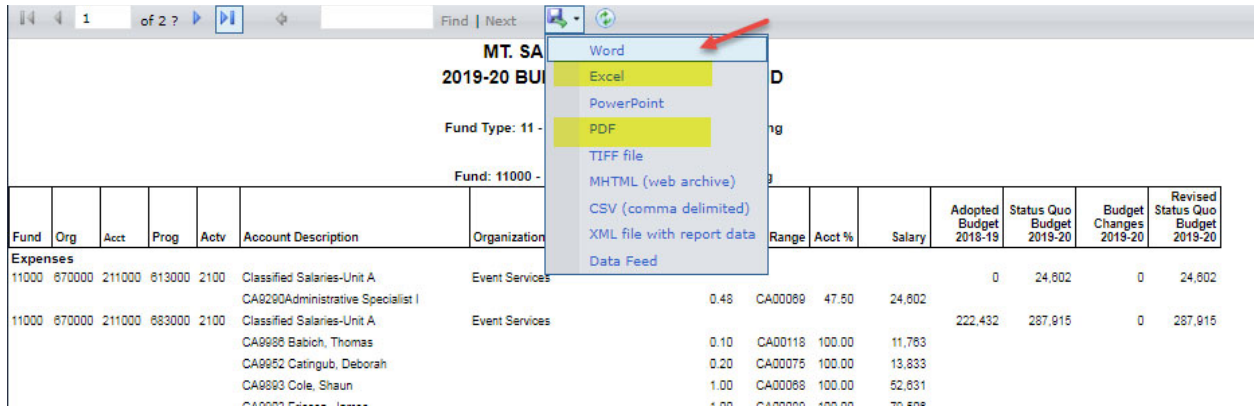
**MT. SAN ANTONIO COLLEGE**  
**2019-20 BUDGET TEMPLATE BY ORGANIZATION**

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 |
|-----------------------|--------|--------|--------|------|-------------------------------------|--------------------------|------|---------|--------|--------|------------------------|---------------------------|------------------------|-----------------------------------|
| <b>Expenses</b>       |        |        |        |      |                                     |                          |      |         |        |        |                        |                           |                        |                                   |
| 11000                 | 670000 | 211000 | 613000 | 2100 | Classified Salaries-Unit A          | Event Services           |      |         |        |        | 0                      | 24,802                    | 0                      | 24,802                            |
|                       |        |        |        |      | CA9290Administrative Specialist I   |                          | 0.48 | CA00069 | 47.50  | 24,802 |                        |                           |                        |                                   |
| 11000                 | 670000 | 211000 | 683000 | 2100 | Classified Salaries-Unit A          | Event Services           |      |         |        |        | 222,432                | 287,915                   | 0                      | 287,915                           |
|                       |        |        |        |      | CA9986 Babich, Thomas               |                          | 0.10 | CA00118 | 100.00 | 11,763 |                        |                           |                        |                                   |
|                       |        |        |        |      | CA9952 Catingub, Deborah            |                          | 0.20 | CA00075 | 100.00 | 13,833 |                        |                           |                        |                                   |
|                       |        |        |        |      | CA9893 Cole, Shaun                  |                          | 1.00 | CA00068 | 100.00 | 52,831 |                        |                           |                        |                                   |
|                       |        |        |        |      | CA9903 Friesen, James               |                          | 1.00 | CA00069 | 100.00 | 79,506 |                        |                           |                        |                                   |
|                       |        |        |        |      | CA9807 Garcia, Yvette               |                          | 1.00 | CA00068 | 100.00 | 65,440 |                        |                           |                        |                                   |
|                       |        |        |        |      | CA9972 Puentes, Dalia               |                          | 0.50 | CA00068 | 100.00 | 38,218 |                        |                           |                        |                                   |
|                       |        |        |        |      | CA9543 Watkins, Sandra              |                          | 0.43 | CA00069 | 42.50  | 28,524 |                        |                           |                        |                                   |
| 11000                 | 670000 | 215000 | 683000 | 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 | 683000 | 2100 | Short-Term, Nonacad Salaries        | Event Services           |      |         |        |        | 27,490                 | 23,810                    | 0                      | 23,810                            |
| 11000                 | 670000 | 232000 | 683000 | 2100 | Professional Expert Salaries        | Event Services           |      |         |        |        | 34,869                 | 34,869                    | 0                      | 34,869                            |
| 11000                 | 670000 | 238000 | 683000 | 2100 | Overtime, Noninstructional          | Event Services           |      |         |        |        | 20,000                 | 20,000                    | 0                      | 20,000                            |
| 11000                 | 670000 | 321000 | 683000 | 2100 | PERS Budget Holding                 | Event Services           |      |         |        |        | 0                      | 67,292                    | 0                      | 67,292                            |
| 11000                 | 670000 | 331000 | 683000 | 2100 | OASDI, Budget Holding               | Event Services           |      |         |        |        | 0                      | 23,143                    | 0                      | 23,143                            |
| 11000                 | 670000 | 335000 | 613000 | 2100 | Medicare, Budget Holding            | Event Services           |      |         |        |        | 0                      | 367                       | 0                      | 367                               |
| 11000                 | 670000 | 335000 | 683000 | 2100 | Medicare, Budget Holding            | Event Services           |      |         |        |        | 0                      | 5,840                     | 0                      | 5,840                             |
| 11000                 | 670000 | 351000 | 613000 | 2100 | State Unemploy Budget Holding       | Event Services           |      |         |        |        | 0                      | 12                        | 0                      | 12                                |
| 11000                 | 670000 | 351000 | 683000 | 2100 | State Unemploy Budget Holding       | Event Services           |      |         |        |        | 0                      | 201                       | 0                      | 201                               |
| 11000                 | 670000 | 361000 | 613000 | 2100 | WIC Budget Holding                  | Event Services           |      |         |        |        | 0                      | 340                       | 0                      | 340                               |
| 11000                 | 670000 | 361000 | 683000 | 2100 | WIC Budget Holding                  | Event Services           |      |         |        |        | 0                      | 5,545                     | 0                      | 5,545                             |
| 11000                 | 670000 | 371000 | 613000 | 2100 | CIL Budget Holding                  | Event Services           |      |         |        |        | 0                      | 500                       | 0                      | 500                               |
| 11000                 | 670000 | 371000 | 683000 | 2100 | CIL Budget Holding                  | Event Services           |      |         |        |        | 0                      | 49,180                    | 0                      | 49,180                            |
| 11000                 | 670000 | 381000 | 613000 | 2100 | Alternative Retire Plan Budget Hold | Event Services           |      |         |        |        | 0                      | 738                       | 0                      | 738                               |
| 11000                 | 670000 | 381000 | 683000 | 2100 | Alternative Retire Plan Budget Hold | Event Services           |      |         |        |        | 0                      | 856                       | 0                      | 856                               |
| 11000                 | 670000 | 451000 | 683000 |      | Supplies                            | Event Services           |      |         |        |        | 8,000                  | 8,000                     | 0                      | 8,000                             |
| 11000                 | 670000 | 561000 | 683000 |      | Contracted Services                 | Event Services           |      |         |        |        | 60,250                 | 60,250                    | 0                      | 60,250                            |
| 11000                 | 670000 | 564000 | 683000 |      | Repairs                             | Event Services           |      |         |        |        | 2,115                  | 2,115                     | 0                      | 2,115                             |
| 11000                 | 670000 | 584000 | 683000 |      | Computer/Technlgy Related Serv      | Event Services           |      |         |        |        | 1,473                  | 1,473                     | 0                      | 1,473                             |
| 11000                 | 670000 | 641200 | 683000 |      | New Equipment-\$500 to \$999        | Event Services           |      |         |        |        | 1,887                  | 1,887                     | 0                      | 1,887                             |
| 11150                 | 670000 | 521000 | 683000 |      | Travel and Conferences              | Event Services           |      |         |        |        | 1,400                  | 1,400                     | 0                      | 1,400                             |
| 11900                 | 670000 | 521000 | 683000 |      | Travel and Conferences              | Event Services           |      |         |        |        | 4,646                  | 0                         | 0                      | 0                                 |
| 11900                 | 670000 | 561000 | 683000 |      | Contracted Services                 | Event Services           |      |         |        |        | 114,854                | 0                         | 0                      | 0                                 |
| 11900                 | 670000 | 584000 | 683000 |      | Computer/Technlgy Related Serv      | Event Services           |      |         |        |        | 186                    | 0                         | 0                      | 0                                 |
| 11908                 | 670000 | 641400 | 683000 |      | New Equipment-Over \$5K             | Event Services           |      |         |        |        | 65,100                 | 0                         | 0                      | 0                                 |
| 11912                 | 670000 | 232000 | 683000 | 2100 | Professional Expert Salaries        | Event Services           |      |         |        |        | 61,962                 | 0                         | 0                      | 0                                 |
| 11912                 | 670000 | 321001 | 683000 | 2100 | PERS Budget Holding                 | Event Services           |      |         |        |        | 9,624                  | 0                         | 0                      | 0                                 |
| 11912                 | 670000 | 331001 | 683000 | 2100 | OASDI, Budget Holding               | Event Services           |      |         |        |        | 3,842                  | 0                         | 0                      | 0                                 |
| 11912                 | 670000 | 335001 | 683000 | 2100 | Medicare, Budget Holding            | Event Services           |      |         |        |        | 898                    | 0                         | 0                      | 0                                 |
| 11912                 | 670000 | 351001 | 683000 | 2100 | State Unemploy Budget Holding       | Event Services           |      |         |        |        | 31                     | 0                         | 0                      | 0                                 |
| 11912                 | 670000 | 361001 | 683000 | 2100 | WIC Budget Holding                  | Event Services           |      |         |        |        | 985                    | 0                         | 0                      | 0                                 |
| <b>Expenses Total</b> |        |        |        |      |                                     |                          |      |         |        |        | <b>758,857</b>         | <b>734,045</b>            | <b>0</b>               | <b>734,045</b>                    |

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





MT. SA  
2019-20 BUI  
Fund Type: 11 -  
Fund: 11000 -

| 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 |
|----------|--------|--------|--------|------|-----------------------------------|----------------|-------|---------|--------|------------------------|---------------------------|------------------------|-----------------------------------|
| Expenses |        |        |        |      |                                   |                |       |         |        |                        |                           |                        |                                   |
| 11000    | 670000 | 211000 | 813000 | 2100 | Classified Salaries-Unit A        | Event Services |       |         |        | 0                      | 24,802                    | 0                      | 24,802                            |
|          |        |        |        |      | CA6260Administrative Specialist I |                | 0.48  | CA00069 | 47.50  | 24,802                 |                           |                        |                                   |
| 11000    | 670000 | 211000 | 883000 | 2100 | Classified Salaries-Unit A        | Event Services |       |         |        | 222,432                | 287,915                   | 0                      | 287,915                           |
|          |        |        |        |      | CA6968 Babich, Thomas             |                | 0.10  | CA00118 | 100.00 | 11,763                 |                           |                        |                                   |
|          |        |        |        |      | CA6962 Catingub, Deborah          |                | 0.20  | CA00075 | 100.00 | 13,833                 |                           |                        |                                   |
|          |        |        |        |      | CA6963 Cole, Shaun                |                | 1.00  | CA00068 | 100.00 | 52,831                 |                           |                        |                                   |
|          |        |        |        |      | CA6968 Edwards, James             |                | 1.00  | CA00068 | 100.00 | 70,598                 |                           |                        |                                   |

## 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 on the download icon located in the top middle section 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<br>2019-20 | Status Quo Budget<br>2019-20 | Budget Changes<br>2019-20 | Revised Status Quo Budget<br>2019-20 |
|-----------------------|--------|--------|--------|------|-------------------------------------|--------------------------|-----|-------|--------|--------|---------------------------|------------------------------|---------------------------|--------------------------------------|
| <b>Expenses</b>       |        |        |        |      |                                     |                          |     |       |        |        |                           |                              |                           |                                      |
| 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 | 361000 | 683000 | 2100 | W/C 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 | 561000 | 683000 |      | Contracted Services                 | Campus Facility Rentals  |     |       |        |        | 1,000                     | 0                            | 0                         | 0                                    |
| 13674                 | 674000 | 563000 | 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                                    |
| <b>Expenses Total</b> |        |        |        |      |                                     |                          |     |       |        |        | 170,862                   | 0                            | 0                         | 0                                    |
| <b>Net Total</b>      |        |        |        |      |                                     |                          |     |       |        |        | 170,862                   | 0                            | 0                         | 0                                    |

3/4/2019 2:17:56 PM

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 2018-19 and 2019-20; and budget, actuals, and commitments (requisitions, purchase orders, and purchase orders change notices) for the fiscal year 2020-21 as of February 22, 2021. 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 Fiscal Year

**Report End Date:** Current month

All other selections 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 in 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, then 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, marked with a lightbulb icon, is highlighted in orange and its dropdown is open. The dropdown list includes: Explorer, Organizations, Scenarios, Position Allocations, Budget Lines, Actual Costs, **Change Requests** (highlighted in yellow), Change Request Budget Lines, Allocations, Statistical Forecasts, Statistical Actuals, and Global Variables. The main content area is titled 'Change Requests' and features a 'Budget Year' dropdown set to '2019-20', a search bar, and 'Search' and 'Advanced' buttons. Below these is a table with columns for 'Budget Year' and 'Change Request Type'.

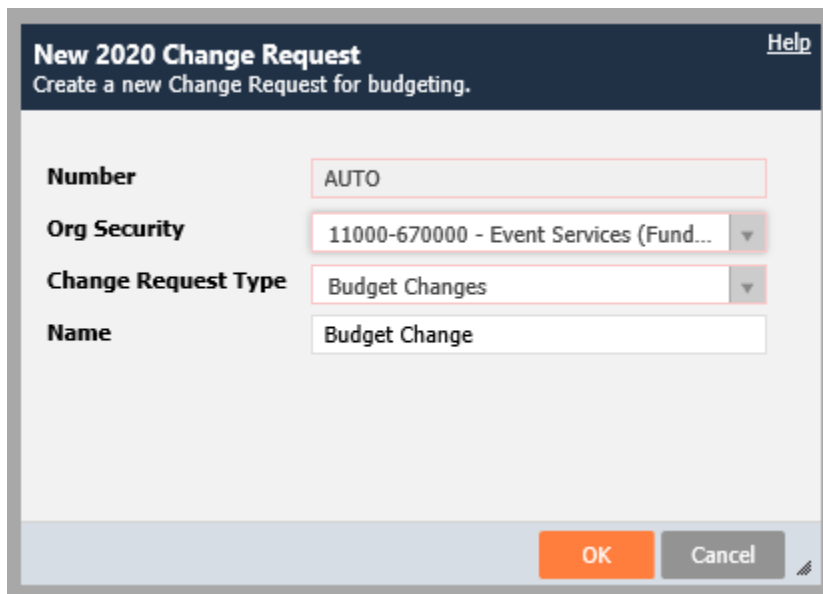
| Budget Year | Change Request Type |
|-------------|---------------------|
|-------------|---------------------|

**Budget Year:** ensure that you are in the **Fiscal Year** for the budget you are developing.  
Click on **+Add Change Request**



The screenshot shows the 'Change Requests' interface. At the top, there is a 'Budget Year' dropdown set to '2019-20'. Below this is a search bar with 'Search' and 'Advanced' buttons. A red arrow points to the '+ Add Change Request' button in the top right corner of the interface. Below the search bar is a table with columns: Budget Year, Change Req..., Number, Name, Description, and Change Req... The table is currently empty.

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.



The screenshot shows the 'New 2020 Change Request' dialog box. The title bar says 'New 2020 Change Request' and 'Create a new Change Request for budgeting.' There is a 'Help' link in the top right. The form has four fields: 'Number' with the value 'AUTO', 'Org Security' with the value '11000-670000 - Event Services (Fund...', 'Change Request Type' with the value 'Budget Changes', and 'Name' with the value 'Budget Change'. At the bottom right 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

File Change Request Scenario Reports Tools Help

General  
**Change Request**  
 Scenario

Operating  
 Operating Changes (2)  
 Position Changes  
 Wage Adjustments

Capital  
 Capital Changes  
 Operating Impacts  
 Projects

Other  
 Documents  
 Notes  
 Change Request Roles

2019-20 2020-743079 - Budget Increase - Main (Published)

**Change Request Information**

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 Change)

Note: Budget Change must be in Balance. Change should net to zero.

Layout Display Options Import... Exp

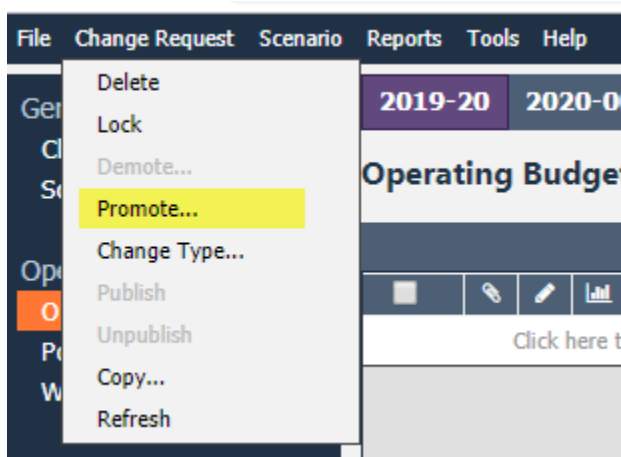
Operating Budget

Click here to add a new record...

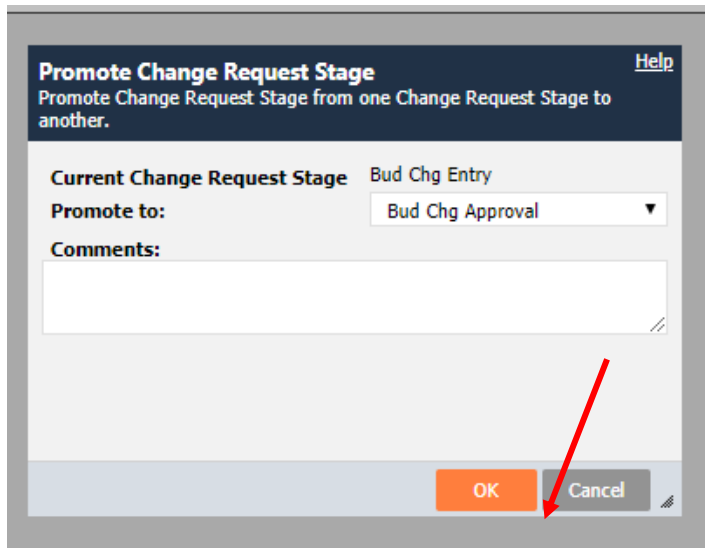
| Account Structure           | Organization                   | Account                 | Program                    | Activity | Description | One Time | 2020  |
|-----------------------------|--------------------------------|-------------------------|----------------------------|----------|-------------|----------|-------|
| 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**



## ORGANIZATIONS SEARCH (DETERMINE APPROVAL STAGE)

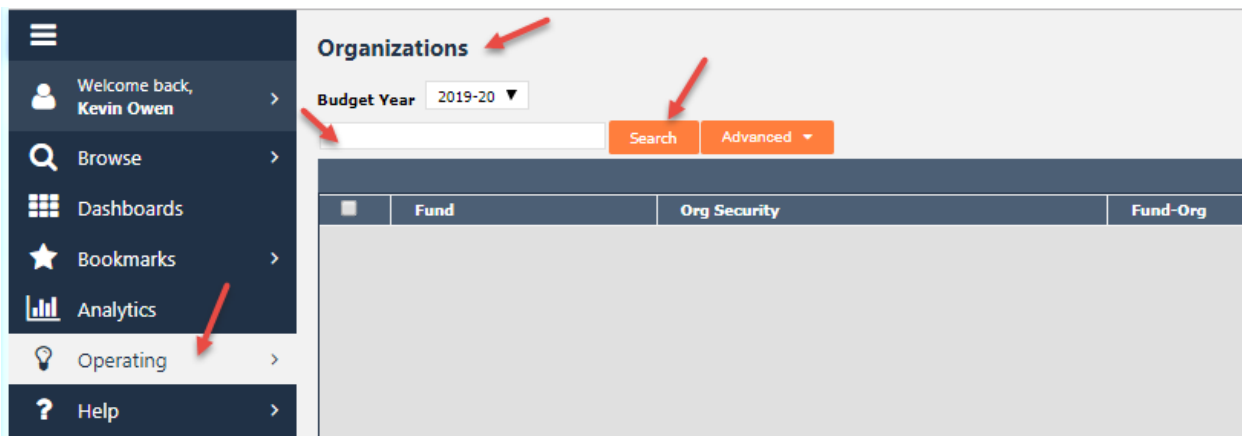
To determine the **approval stage** of your Organizational budget(s):

Go to the **Operating** menu

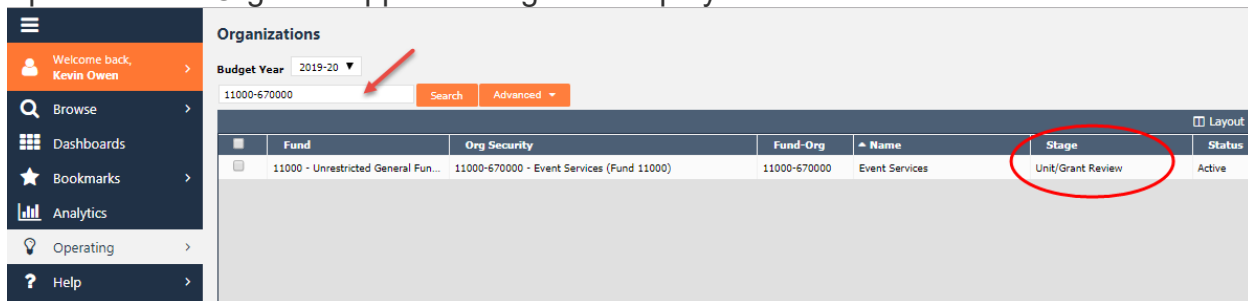
Select **Organizations**

**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.



Specific Fund-Org: The approval stage will display





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 |
|--------------------------|-------------------------------------|---|--------------|----------------------------------|-------------------|--------|
| <input type="checkbox"/> | 13675 - Box Office                  | 13675-675000 - Box Office (Fund 13675)                      | 13675-675000 | Box Office                       | Unit/Grant Review | Active |
| <input type="checkbox"/> | 13675 - Box Office                  | 13675-675950 - Box Office-Concessions (Fund 13675)          | 13675-675950 | Box Office-Concessions           | Unit/Grant Review | Active |
| <input type="checkbox"/> | 13675 - Box Office                  | 13675-675002 - Box Office-Dance Maker (Fund 13675)          | 13675-675002 | Box Office-Dance Maker           | Unit/Grant Review | Active |
| <input type="checkbox"/> | 11000 - Unrestricted General Fun... | 11000-672000 - Broadcast and Presentation Servs (Fund 11... | 11000-672000 | Broadcast and Presentation Servs | Unit/Grant Review | Active |
| <input type="checkbox"/> | 11150 - Conference/Travel-Mgmt...   | 11150-672000 - Broadcast and Presentation Servs (Fund 11... | 11150-672000 | Broadcast and Presentation Servs | Unit/Grant Review | Active |
| <input type="checkbox"/> | 11900 - Unrestricted General Fun... | 11900-672000 - Broadcast and Presentation Servs (Fund 11... | 11900-672000 | Broadcast and Presentation Servs | Unit/Grant Review | Active |
| <input type="checkbox"/> | 11907 - FY 15-16 New Resources...   | 11907-672000 - Broadcast and Presentation Servs (Fund 11... | 11907-672000 | Broadcast and Presentation Servs | Unit/Grant Review | Active |
| <input type="checkbox"/> | 17800 - Lottery-Restricted          | 17800-672000 - Broadcast and Presentation Servs (Fund 17... | 17800-672000 | Broadcast and Presentation Servs | Unit/Grant Review | Active |
| <input type="checkbox"/> | 11913 - FY 17-18 New Resources...   | 11913-672000 - Broadcast and Presentation Servs (Fund 11... | 11913-672000 | Broadcast and Presentation Servs | Unit/Grant Review | Active |
| <input type="checkbox"/> | 13674 - Campus Facility Rentals     | 13674-674000 - Campus Facility Rentals (Fund 13674)         | 13674-674000 | Campus Facility Rentals          | Unit/Grant Review | Active |
| <input type="checkbox"/> | 11000 - Unrestricted General Fun... | 11000-670000 - Event Services (Fund 11000)                  | 11000-670000 | Event Services                   | Unit/Grant Review | Active |
| <input type="checkbox"/> | 11900 - Unrestricted General Fun... | 11900-670000 - Event Services (Fund 11900)                  | 11900-670000 | Event Services                   | Unit/Grant Review | Active |
| <input type="checkbox"/> | 11908 - FY 15-16 New Resources...   | 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 Questica 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, Questica 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

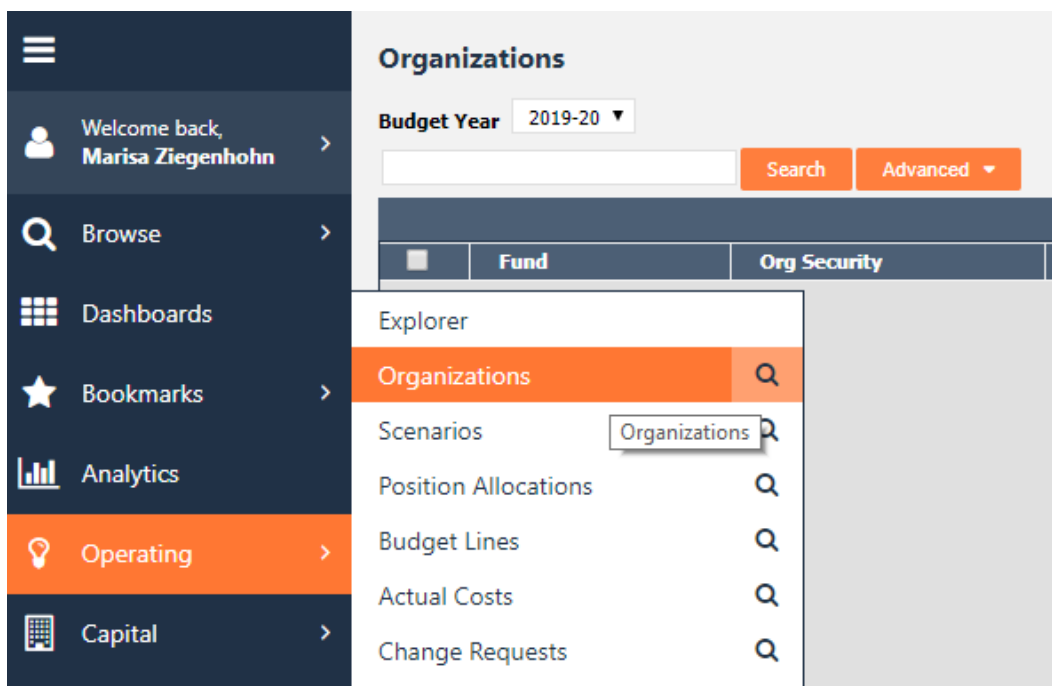
|                          | Fund                                | Org Security                               | Fund-Org     | Name           | Stage             | Status |
|--------------------------|-------------------------------------|--|--------------|----------------|-------------------|--------|
| <input type="checkbox"/> | 11000 - Unrestricted General Fun... | 11000-670000 - Event Services (Fund 11000) | 11000-670000 | Event Services | Unit/Grant Review | Active |
| <input type="checkbox"/> | 11900 - Unrestricted General Fun... | 11900-670000 - Event Services (Fund 11900) | 11900-670000 | Event Services | Unit/Grant Review | Active |
| <input type="checkbox"/> | 11908 - FY 15-16 New Resources...   | 11908-670000 - Event Services (Fund 11908) | 11908-670000 | Event Services | Unit/Grant Review | Active |
| <input type="checkbox"/> | 11912 - FY 17-18 New Resources...   | 11912-670000 - Event Services (Fund 11912) | 11912-670000 | Event Services | Unit/Grant Review | Active |
| <input type="checkbox"/> | 11150 - Conference/Travel-Mgmt...   | 11150-670000 - Event Services (Fund 11150) | 11150-670000 | Event Services | Unit/Grant Review | Active |
| <input type="checkbox"/> | 11913 - FY 17-18 New Resources...   | 11913-670000 - Event Services (Fund 11913) | 11913-670000 | Event Services | Unit/Grant Review | Active |

## PROMOTING/DEMOTING ORGANIZATIONS

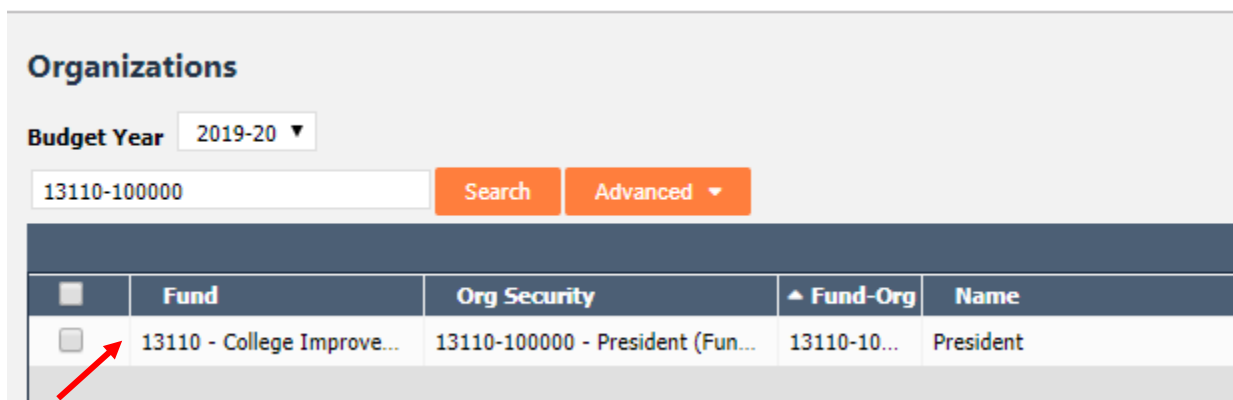
When you have finished making all changes to your organizational budgets, the next step is to “Promote” it to the next stage, to be reviewed by the next level. Once the Organization is promoted to the next stage, you will not be able to edit it unless the next level reviewer “Demotes” it back to your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

### Promoting a Single Organization

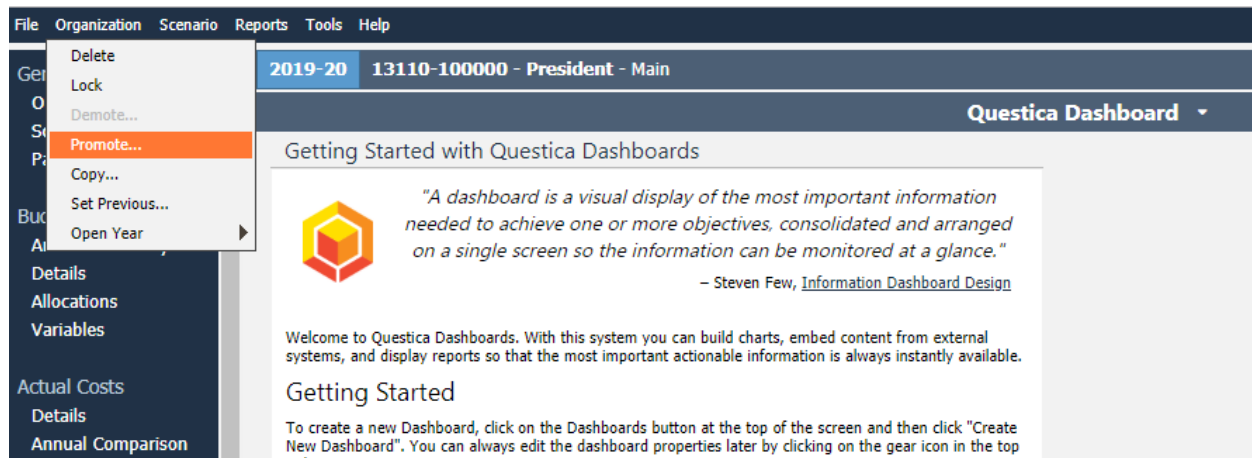
Under the **Operating** menu  
Select **Organizations**



Search for the Organization (either by Fund-Org number or description), then Double click on selected **Org Security**.

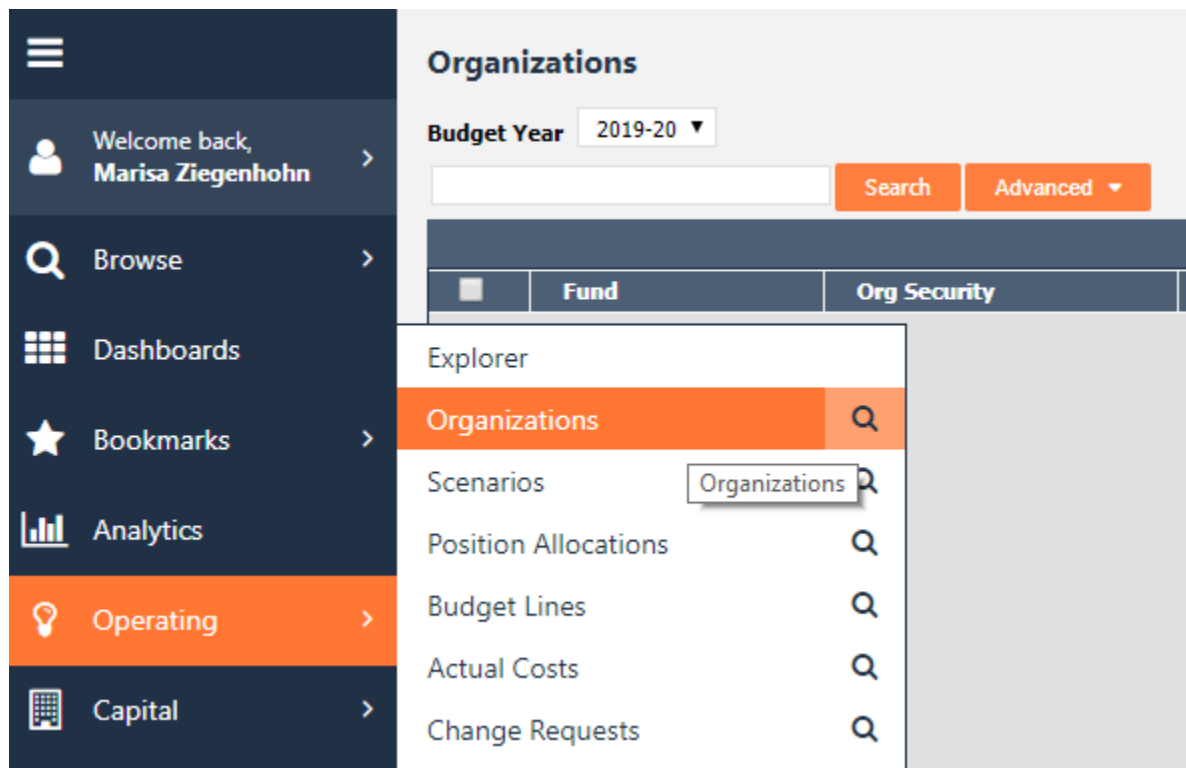


From the top ribbon under **Organization** select **Promote** from the drop down menu.



## Demoting a Single Organization

Under the **Operating** menu  
Select **Organization**



Search for the Organization (either by Fund-Org number or name), then  
Double click on selected **Org Security**

**Organizations**

Budget Year 2019-20 ▼

Search Advanced ▼


| <input type="checkbox"/> | 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...**

File Organization Scenario Reports Tools Help

2019-20 11000-610000 - Fiscal Services - Main

Getting Started with Qwestica Dashboards

 "A dashboard is a visual display of the most important information needed to achieve one or more objectives, consolidated and arranged on a single screen so the information can be monitored at a glance."  
– Steven Few, [Information Dashboard Design](#)

Welcome to Qwestica Dashboards. With this system you can build charts, embed content from external systems, and display reports so that the most important actionable information is always instantly available.

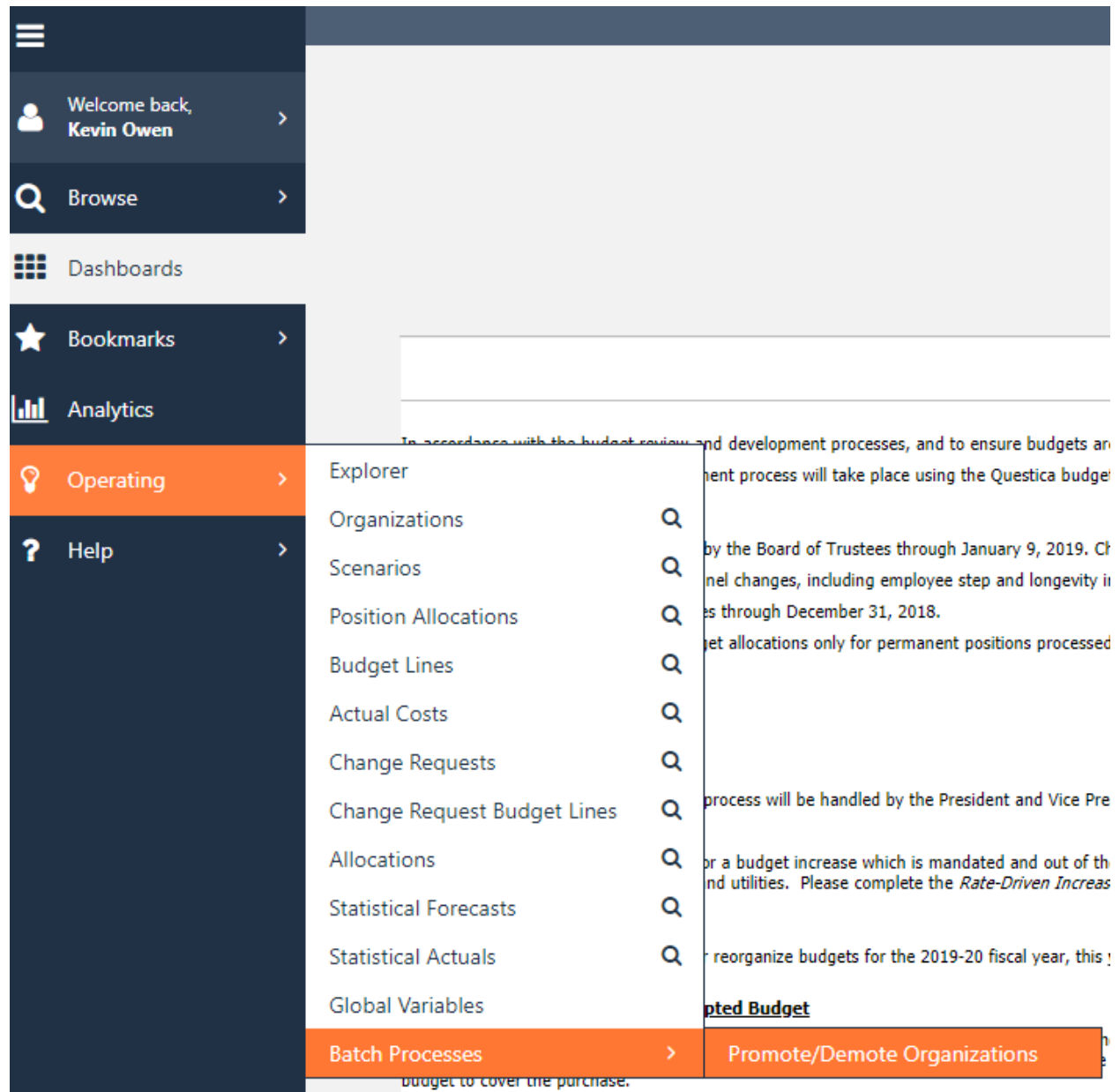
## Batch Process Promotion or Demotion

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 Organizations**



Search for the **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 Budge |
|--------------------------|--------------------|--|--------------|--------------------|-------------------|--------|------------|
| <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

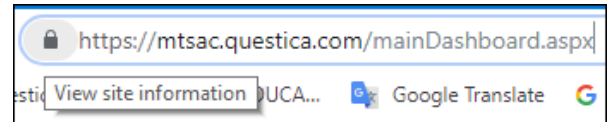
## ALLOW POP-UPS IN CHROME FOR QUESTICA

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.



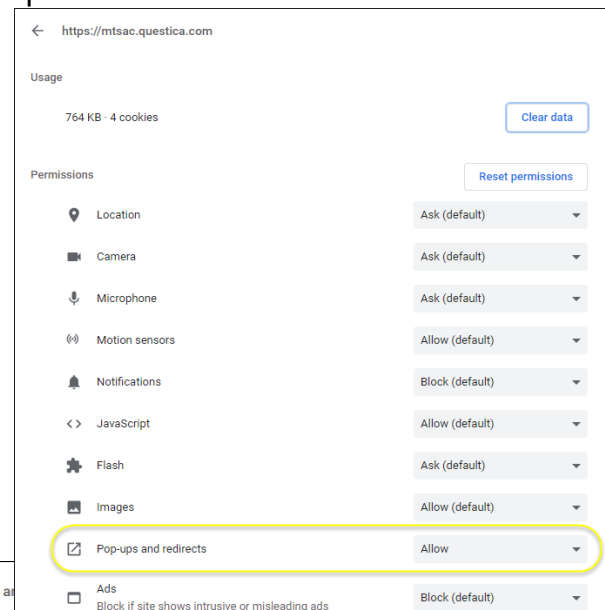
Select **Site Settings** in the drop-down that opens.

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

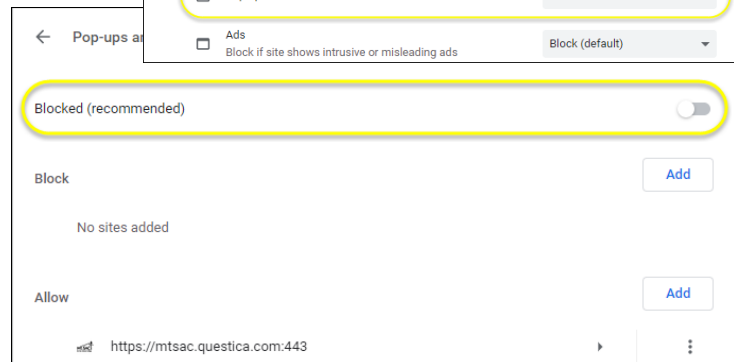
Select **Allow** in the drop-down across from Pop-ups and redirects.



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 Fund 11120 is contractual. Switches from one Org to another Org are allowed as long as the Fund remains under 11120 and has an instructional program code (000000 to 499999).
6. Book rentals for Instructional Programs account 563200 is contractual. Switches from one Organization to another Organization are allowed as long as the account remains under 563200 and has an instructional program code (000000 to 499999).
7. Instructional service agreements for Instructional programs account 561800 is contractual. Switches from one Organization to another Organization are allowed as long as the account remains under 561800 and has an instructional program code (000000 to 499999).