



2027

BUDGET DEVELOPMENT 2027 QUESTICA PROCESS GUIDE

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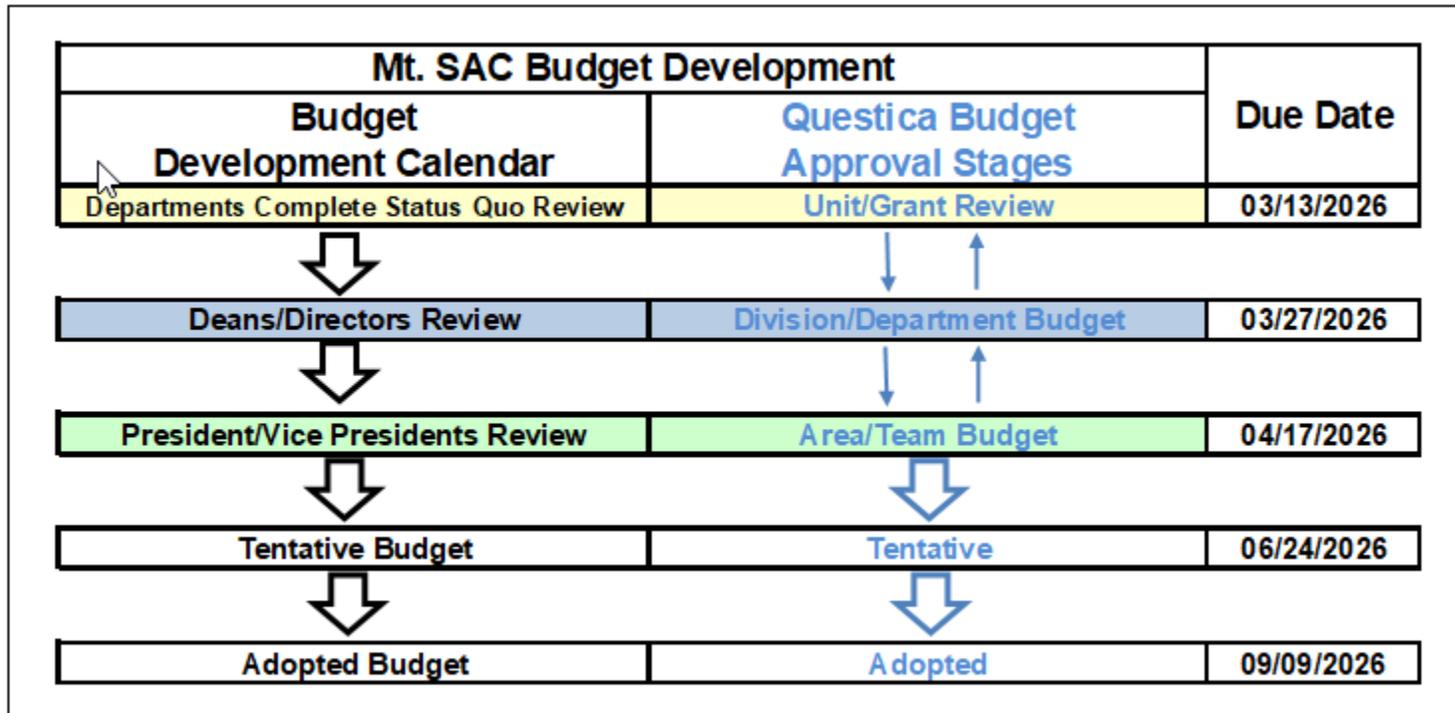
INTRODUCTION

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 containing 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 guide of how to use the Questica budget software, particularly within the Reports and Operating menus.

WHAT IS AN ORGANIZATION IN QUESTICA BUDGET WHEN COMPARED WITH THE BANNER ACCOUNT STRUCTURE?

It combines the 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	211000	672000	2100
QUESTICA	Fund-Org		Account	Program	Activity
	11000-610000		211000	672000	2100

REVIEWING AND DEVELOPING A BUDGET IN QUESTICA

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

1. Go into the "Reports" menu and run your reports.
2. Review your reports and determine your "Budget Changes."
3. Go into "Operating" menu under "Budgeting" and process your "Budget Changes."
4. Once your budget review and changes are completed, "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. Please contact the IT Help Desk (Ext 4357) if you do not have a username or password.

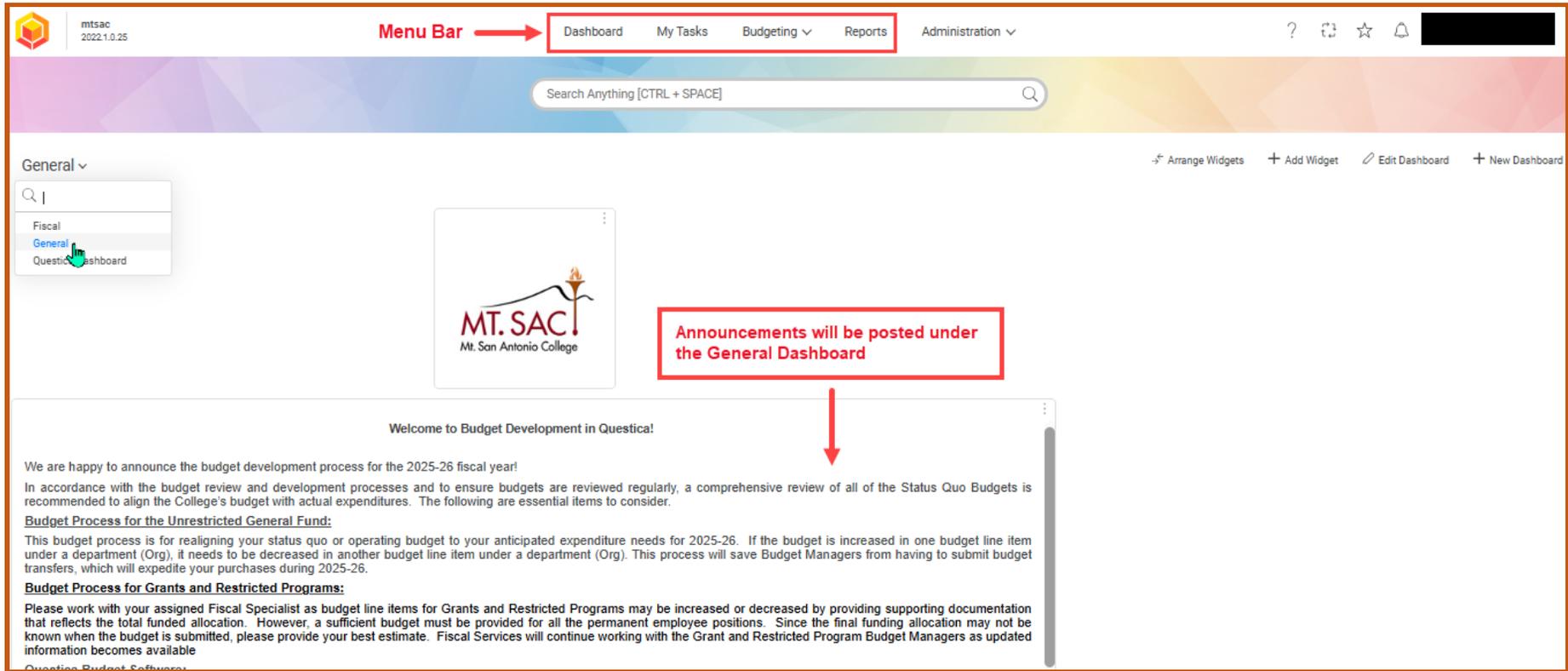
1. Navigate to the Banner Home Page: banner.mtsac.edu and click the Questica icon.
2. Enter your Mt. SAC Portal username and password.
3. Click the continue button.
4. If the login process is successful, the next page that appears will be the Questica homepage.

The screenshot displays the Mt. San Antonio College IT Applications page. At the top, the college name is in a dark red header. Below it, a navigation bar includes 'IT Applications' and a dropdown menu with 'Questica' highlighted by a yellow box and an arrow. Other menu items include 'Environments', 'PROD', 'TEST', 'PPRD', 'UPGR', and 'RSCH'. Utility links for 'Sign In', 'Search', 'Directory', 'Map', and 'Listen' are also present. A message below the navigation bar reads: 'Discover the differences between the new and old Banner homepages by watching the [New Banner Homepage Video!](#)'

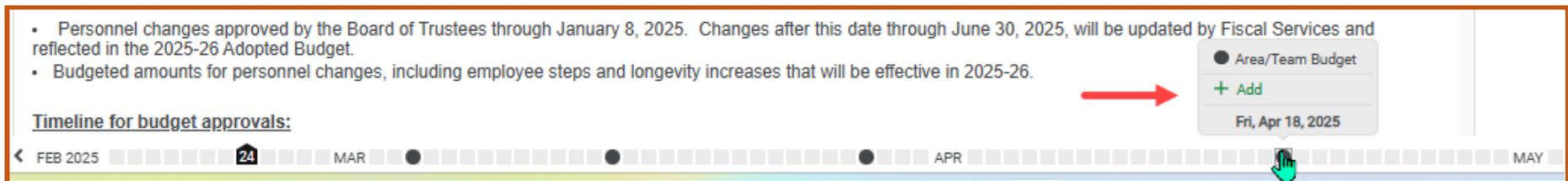
The main content area features three columns of application tiles:

- Banner & DegreeWorks:** Includes a 'Login to Banner *PROD* Environment' button and links for 'Avoid Creating Duplicate IDs', 'Learn the SGASADD Form', and 'General Navigation Training'.
- Argos & Data/Reports:** Includes a 'Login to Argos *PROD* Environment' button and links for 'Report Creation' and 'Datablock Requests'.
- etrieve™ by Softdocs:** Includes a 'Login to Etrieve *PROD* Environment' button and links for 'Etrieve Resource Site', 'OmniCMS User Request Forms Now Available!', and 'Payroll Forms Now Available!'.

QUESTICA HOME PAGE



- The Menu Bar is displayed at the top middle of the screen.
- Announcements are posted under the Dashboard Menu.
- A timeline with deadlines is displayed at the bottom of the screen for your reference.



MENU BAR CONTENT

Your name is displayed on the top right corner.

User profile settings and Sign Out can be found in **this section**.

The screenshot shows the top navigation bar of the application. On the left, there is a logo and the text "mtsac-test 2022.1.0.11". The navigation menu includes "Dashboard", "My Tasks" (with a red notification badge containing the number 6), "Budgeting" (with a dropdown arrow), and "Reports". On the right side, there are icons for help (?), refresh, star, and a notification bell (with a red badge containing 6). Next to these is a user profile icon with the letter "A" and the name "AdminTest" with a dropdown arrow. Below the navigation bar is a search bar with the placeholder text "Search Anything [CTRL + SPACE]". A callout box points to the search bar with the text: "Browse: Google like search bar allows you to search for what you are looking for by entering a keyword. i.e. Org number". Below this, a smaller search bar shows the input "675000" and a search result: "Organization | 2024 | 13675-675000 - Box Office". On the right side, a dropdown menu is open, showing options: "Profile Settings...", "Switch to Dark Theme", and "Sign Out".

Dashboard: Announcements and Messages are displayed in this section.

My Tasks: Lists all Fund-Orgs pending promotion to the next stage.

The screenshot shows the "My Tasks" section of the application. The navigation bar is the same as in the previous screenshot, but "My Tasks" is the active page. Below the navigation bar is a search bar labeled "Search Tasks". There are two tabs: "Current Tasks" (selected) and "All Deadlines". Below the tabs is a table with columns: "Budget Year", "Task", and "Stage". The table contains two rows of data:

Budget Year	Task	Stage
2023-24	11000-670000 - Event Services	Unit/Grant Review
2023-24	11000-671000 - Performing Arts Operations	Unit/Grant Review

Budgeting: Access organizations, enter budget changes, and promote the organizations budget to the next level.

Reports: Run and view your Budget Templates by Fund or Organization or MtSAC Budget and Expenditure Comparative Report.

Other: Bookmarks and Notifications are displayed next to your name in the top right corner.

This close-up screenshot shows the top right corner of the application. It features a help icon (?), a refresh icon, a star icon, and a notification bell icon with a red badge containing the number 6. To the right of these icons is a user profile icon with the letter "A" and the name "AdminTest" with a dropdown arrow. A callout box points to the star icon with the text "Bookmarks".

REPORTS

Run and View available reports.

mt SAC - test
2022.1.0.11

Dashboard My Tasks ⁶ Budgeting ▾ Reports

Report Center

MtSAC Budget Template by 🔍

All Reports ▾ All Categories ▾ All Contexts ▾ Reports & Smart Reports ▾

Enter keyword to narrow your search or click on magnifying glass to view all available reports.

- MtSAC Adopted Budget by Organization**
Budget Template for end users to run and export to Excel/PDF, update budget changes column and submit to Fiscal Services.
- MtSAC Budget Template by Fund** ←
Budget Template for end users to run and export to Excel/PDF, update budget changes column and submit to Fiscal Services
- MtSAC Budget Template by Organization** ←
Budget Template for end users to run and export to Excel/PDF, update budget changes column and submit to Fiscal Services

1. MtSAC Budget Template by Organization

Mainly used for the Unrestricted General Fund Type 11 and Restricted Fund Type 75. You will only be able to run reports for Funds and Organizations you have been granted access to under your area of responsibility.

REPORTS (continued)

To run the report:

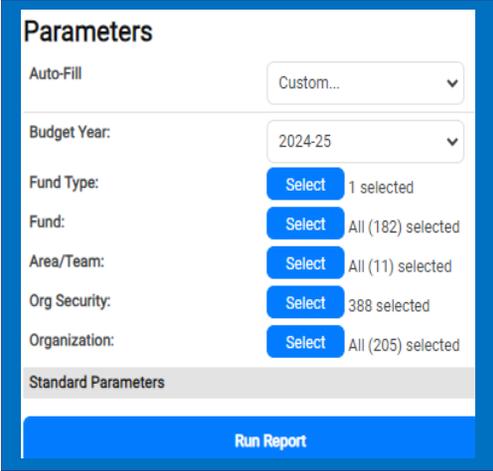
Click on Mt. SAC Budget Template by Organization – a window will appear to the right with a snapshot of the report – Click on **Run Report** button.

Report Selection Criteria will appear. 

From the dropdown list, select the following parameters:

- **Budget Year:** Select the Budget Development year
- **Fund Type:** 11 – Unrestricted General Fund
- **Fund:** Check All Items
- **Area/Team:** Select All Items
- **Org Security:** Check All Items
- **Organization:** Check All Items
- Click on the **Run Report** button

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



The screenshot shows a 'Parameters' window with the following fields and values:

Parameter	Value
Auto-Fill	Custom...
Budget Year:	2024-25
Fund Type:	Select 1 selected
Fund:	Select All (182) selected
Area/Team:	Select All (11) selected
Org Security:	Select 388 selected
Organization:	Select All (205) selected

At the bottom of the window, there is a 'Standard Parameters' section and a blue 'Run Report' button.

You can view, print, or download the report in Word, PDF, Excel, or CSV format.

Select format from the drop-down menu by clicking on the save icon located at the top middle of the screen.



REPORTS (continued)

**MT. SAN ANTONIO COLLEGE
2024-25 BUDGET TEMPLATE**

Fund Type: 13 - Unrestr Gen Fund Revenue Generated

Organization: 100100 - College Improvements

Fund	Org	Acct	Prog	Actv	Account Description	Organization Description	FTE	Range	Acct %	Salary	Adopted Budget 2023-24	Status Quo Budget 2024-25	Budget Changes 2024-25	Revised Status Quo Budget 2024-25
Expenses / Expenses														
13110	100100	641400	601000		New Equipment-Over \$5K	College Improvements					88,027	0	0	0
13110	100100	794001	601000		Assigned Fund Bal-Revenue Generated	College Improvements					351,783	0	0	0
Expenses / Expenses Total											<u>439,810</u>	<u>0</u>	<u>0</u>	<u>0</u>
Revenues / Funding Sources														
13110	100100	885000	601000		Rentals and Leases	College Improvements					100,027	0	0	0
Revenues / Funding Sources Total											<u>100,027</u>	<u>0</u>	<u>0</u>	<u>0</u>
Net Total											(339,783)	0	0	0

REPORTS (continued)

2. MtSAC Budget Template by Fund

Mainly used for all other Fund Types, except the Unrestricted General Fund Type 11 and Restricted Fund Type 75.

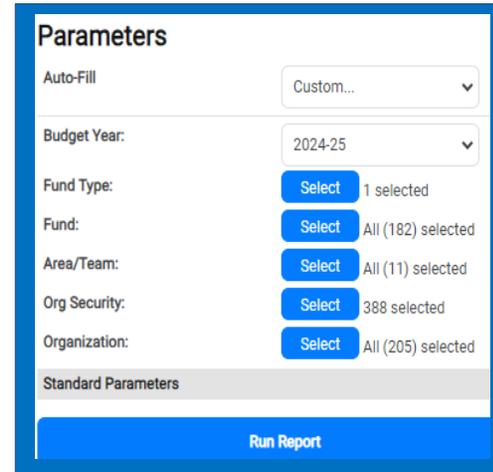
To run the report:

Click on Mt. SAC Budget Template by Fund – a window will appear to the right with a snapshot of the report – Click on the **Run Report** button.

Report Selection Criteria will appear. 

From the dropdown list, select the following parameters:

- **Budget Year:** Select the Budget Development year
- **Fund Type:** Select Fund Type
- **Fund:** Select Fund (s)
- **Area/Team:** Select All Items
- **Org Security:** Check All Items
- **Organization:** Check All Items
- Click on the **Run Report** button



Parameters

Auto-Fill: Custom... (dropdown)

Budget Year: 2024-25 (dropdown)

Fund Type: Select 1 selected

Fund: Select All (182) selected

Area/Team: Select All (11) selected

Org Security: Select 388 selected

Organization: Select All (205) selected

Standard Parameters

Run Report

The report will display to the right of the selection criteria menu, follow instructions from previous page to view, print or download the report.

MT. SAN ANTONIO COLLEGE 2024-25 BUDGET TEMPLATE														
Fund: 13 - Unrestr Gen Fund Revenue Generated														
Fund: 13300 - Pathways Projects														
Fund	Org	Acct	Prog	Actv	Account Description	Organization Description	FTE	Range	Acct %	Salary	Adopted Budget 2023-24	Status Quo Budget 2024-25	Budget Changes 2024-25	Revised Status Quo Budget 2024-25
Expenses / Expenses														
13300	300000	794001	660000		Assigned Fund Bal-Revenue Generated	Vice President Instruction					10,000	0	0	0
Expenses / Expenses Total											10,000	0	0	0
Net Total											(10,000)	0	0	0

REPORTS (continued)

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 Fund Type 11 – Unrestricted General Fund. The report will display the budget and actuals for fiscal years 2022-23 and 2023-24; and budget, actuals, and commitments (requisitions, purchase orders, and purchase orders change notices) for the fiscal year 2024-25.

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 MtSAC Budget and Expenditure Comparative Report – a window will appear to the right with a snapshot of the report – Click on the  button.

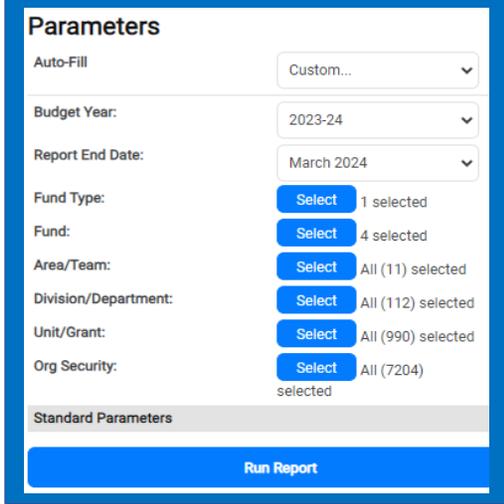
Report Selection Criteria will appear. 

From the dropdown list, select the following parameters:

- **Budget Year:** Select the **Current** Fiscal Year
- **Report End Date:** Current month

All other selections are preselected for you

- Click on the  button



Parameters	
Auto-Fill	Custom... ▼
Budget Year:	2023-24 ▼
Report End Date:	March 2024 ▼
Fund Type:	 1 selected
Fund:	 4 selected
Area/Team:	 All (11) selected
Division/Department:	 All (112) selected
Unit/Grant:	 All (990) selected
Org Security:	 All (7204) selected
Standard Parameters	
	

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

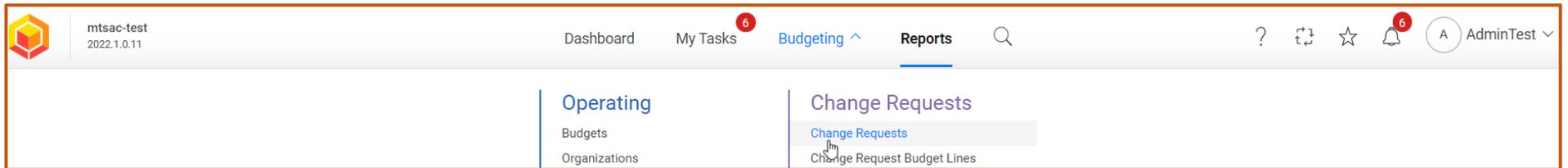
You may download the reports in the format of your choice (Excel or PDF) to determine the budget changes needed to realign your budgets with planned expenditures. The procedures for budget changes are explained in the next section.

CHANGE REQUEST – BUDGET CHANGES

Budget managers use this process to make changes to their budget line items. It 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 standard business rules, refer to Appendix A.**

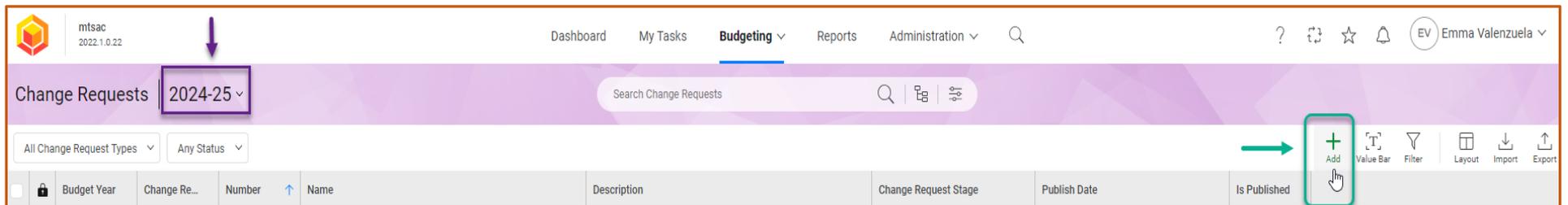
To process a budget change:

- Go to [Budgeting](#)
- Select [Change Requests](#)



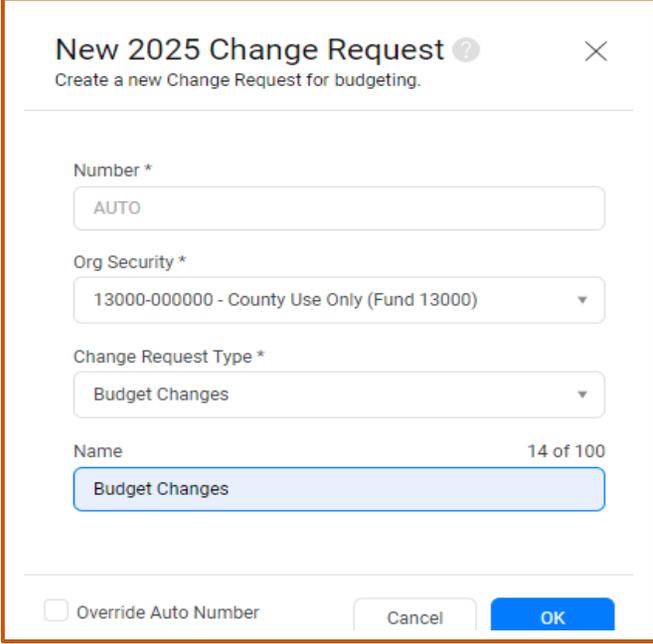
Budget Year: Select Budget Development **Fiscal Year**

Click on **+Add**



CHANGE REQUEST – BUDGET CHANGES (continued)

- **Number:** AUTO (system generated)
 - **Org Security:** Enter or select Org Security
 - **Change Request Type:** Select **Budget Changes**
 - **Name:** Type **Budget Changes**
-
- Click the  button



New 2025 Change Request ? ×
Create a new Change Request for budgeting.

Number *
AUTO

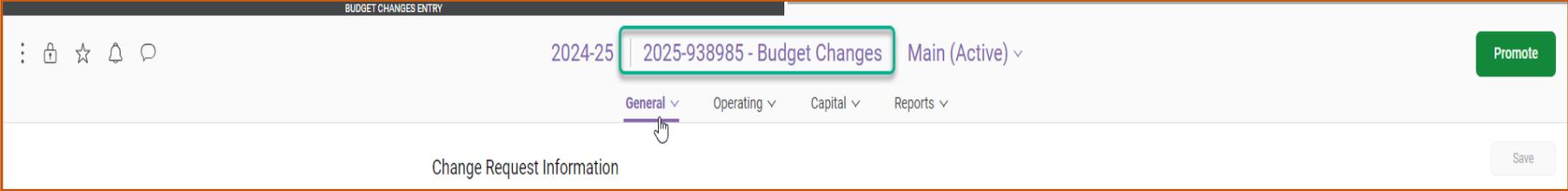
Org Security *
13000-000000 - County Use Only (Fund 13000) ▾

Change Request Type *
Budget Changes ▾

Name 14 of 100
Budget Changes

Override Auto Number Cancel OK

This will open another window tab.



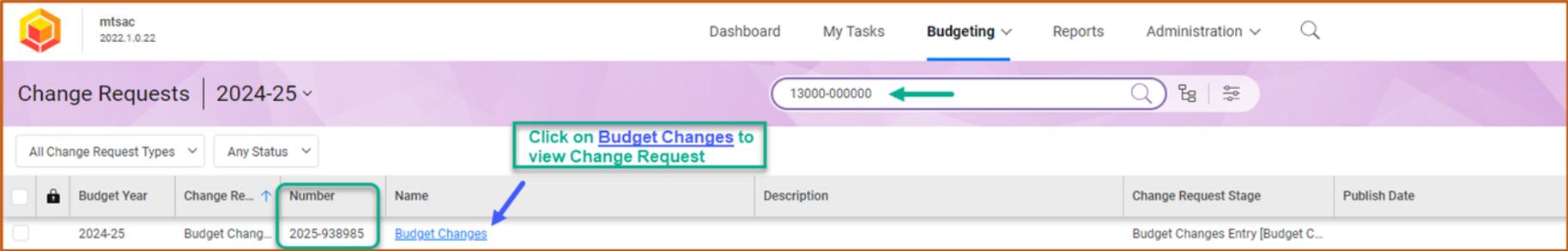
BUDGET CHANGES ENTRY

2024-25 | 2025-938985 - Budget Changes | Main (Active) ▾ Promote

General ▾ | Operating ▾ | Capital ▾ | Reports ▾

Change Request Information Save

Note: If system doesn't automatically default to screen above you can search for the change request by entering the Org Security (Fund-Org) in the search bar.



mtsac 2022.1.0.22 | Dashboard | My Tasks | **Budgeting** ▾ | Reports | Administration ▾ | 🔍

Change Requests | 2024-25 ▾ | 13000-000000 🔍

All Change Request Types ▾ | Any Status ▾

	Budget Year	Change Re...	Number	Name	Description	Change Request Stage	Publish Date
<input type="checkbox"/>	2024-25	Budget Chang...	2025-938985	Budget Changes		Budget Changes Entry [Budget C...	

Click on [Budget Changes](#) to view Change Request

CHANGE REQUEST – BUDGET CHANGES (continued)

- Go to the **General** menu
- **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% or Contract or Grant Closed)
- Click **Save** button

BUDGET CHANGES ENTRY

2024-25 | 2025-938985 - Budget Changes | Main (Active) ▾

Promote

General ▾ | Operating ▾ | Capital ▾ | Reports ▾

Change Request Information

Name
Budget Changes

Number *
2025-938985

Change Request Type *
Budget Changes ▾

Publish Date

Description
Fund 13000-Unrestricted General Fund-Revenue Generated

Comments
To provide funds for contracted services and conference and travel for staff to attend Questica Training.

Justification
Contract - Board Approved December 2023. 42

Org Security *
13000-000000 - County Use Only (Fund 13000) ▾

Save

CHANGE REQUEST – BUDGET CHANGES (continued)

- Go to **Operating** menu – Select Change Request Budget Lines
- Click on the **+ Add** icon to add a budget line

The screenshot shows the 'BUDGET CHANGES ENTRY' interface. At the top, there are navigation icons and a breadcrumb trail: '2024-25 | 2025-938985 - Budget Changes | Main (Active)'. Below this are tabs for 'General', 'Operating' (selected), 'Capital', and 'Reports'. A 'Promote' button is in the top right. The main area is titled 'Operating Budget'. On the right, there are filters for 'Annual' (set to 1 YR), 'Forecast Year' (2025), and 'Precision' (0). There are also icons for '+ Add', 'Value Bar', 'Filter', 'Layout', 'Import', and 'Export'. At the bottom, a table header is visible with columns: 'Account Structure', 'Organization', 'Account', 'Program', 'Activity', 'Description', 'One Time', and '2025'.

- Enter the **Organization** (Fund-Org), **Account**, and **Program** by typing them under the headers or selecting 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 current Budget Development Year.
- Do not click on the **“One Time”** button if this is an ongoing change – permanent change for current and future budgets.
- Enter the amount of the budget line change under the Budget Year field. To decrease the budget line, enter a minus – sign.
- Tab to save and click on the **+Add** icon to add a budget line.
- Budget Changes must be in balance. Any differences will be reflected under the budget year field.
- To Edit a field double click on the field you want to edit or right click and select Edit.
- Select all lines by clicking on the radio button next to the lock icon,  then click **Promote**.

A callout box showing a table for the year 2025. The table has two columns: the first column contains values (10,000, 5,000, 5,000) and the second column is empty. The values are aligned to the right, with the first value being negative.

2025	
(10,000)	
5,000	
5,000	

The screenshot shows the 'BUDGET CHANGES ENTRY' interface with a list of budget lines. The breadcrumb trail is '2024-25 | 2025-938985 - Budget Changes | Main (Active)'. The 'Operating' tab is selected. The table has columns: 'Account Structure', 'Organization', 'Account', 'Program', 'Activity', 'Description', 'One Time', and '2025'. The first three columns are collapsed under 'Account Type: Expenses / Expenses'. There are three rows, each with a checked checkbox in the 'One Time' column. The '2025' column contains values: (10,000), 5,000, and 5,000. A 'Promote' button is in the top right.

Account Structure	Organization	Account	Program	Activity	Description	One Time	2025
13611-960700-589000-672000-	13611-960700 - Restricted Progr...	589000 - Other Services	672000 - Fiscal Operations			✓	(10,000)
13611-960700-521000-672000-	13611-960700 - Restricted Progr...	521000 - Travel and Conferences	672000 - Fiscal Operations			✓	5,000
13611-960700-561000-672000-	13611-960700 - Restricted Progr...	561000 - Contracted Services	672000 - Fiscal Operations			✓	5,000

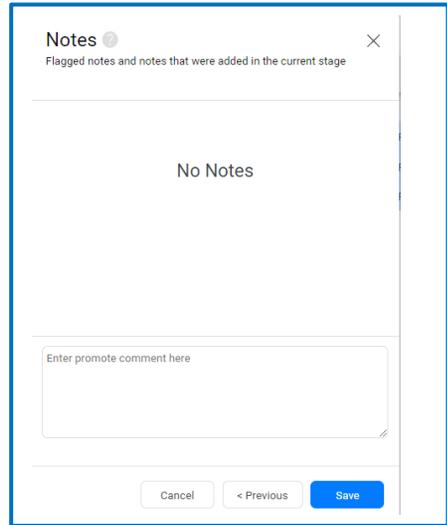
CHANGE REQUEST – BUDGET CHANGES (continued)

- A pop-up window will pop up – Select Budget Changes Approved, then click **Next >**

Next >

- A second window will pop-up. Click **Save**

Save

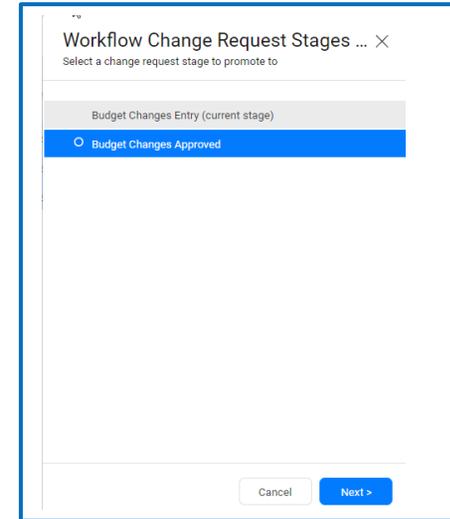


Notes ✕
Flagged notes and notes that were added in the current stage

No Notes

Enter promote comment here

Cancel < Previous Save



Workflow Change Request Stages ... ✕
Select a change request stage to promote to

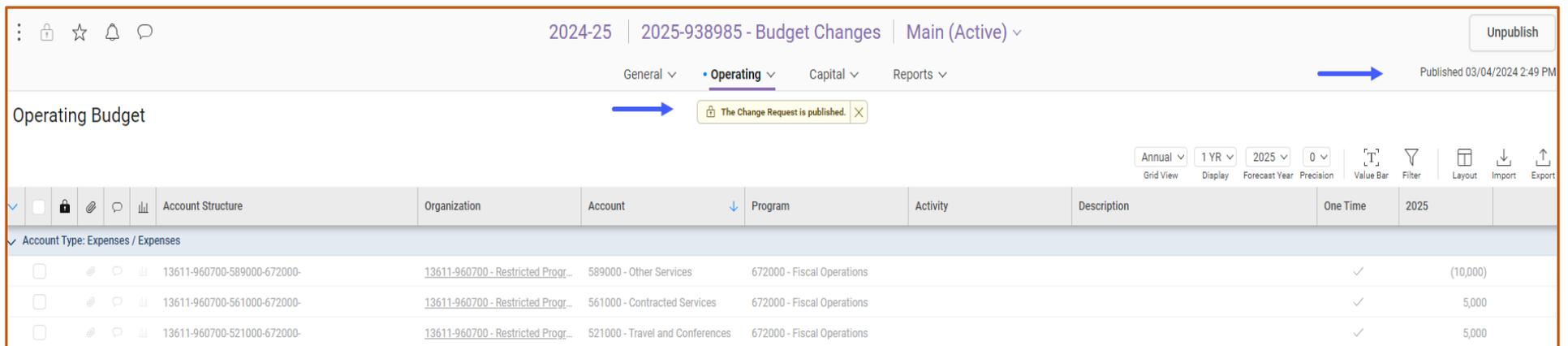
Budget Changes Entry (current stage)

Budget Changes Approved

Cancel Next >

- You should see a message at the top middle of the screen if your Budget Change Entry was published. **The Change Request is published.**

The Change Request is published. ✕



2024-25 | 2025-938985 - Budget Changes | Main (Active) Unpublish

General ▾ • Operating ▾ Capital ▾ Reports ▾ Published 03/04/2024 2:49 PM

Operating Budget The Change Request is published.

Annual ▾ 1 YR ▾ 2025 ▾ 0 ▾ [T] Filter Layout Import Export

Account Structure	Organization	Account	Program	Activity	Description	One Time	2025
Account Type: Expenses / Expenses							
<input type="checkbox"/> 13611-960700-589000-672000-	13611-960700 - Restricted Progr...	589000 - Other Services	672000 - Fiscal Operations			✓	(10,000)
<input type="checkbox"/> 13611-960700-561000-672000-	13611-960700 - Restricted Progr...	561000 - Contracted Services	672000 - Fiscal Operations			✓	5,000
<input type="checkbox"/> 13611-960700-521000-672000-	13611-960700 - Restricted Progr...	521000 - Travel and Conferences	672000 - Fiscal Operations			✓	5,000

CHANGE REQUEST – BUDGET CHANGES (continued)

Budget Changes will be reflected on the Budget Template Reports under the Budget Changes Column 2025-26.

Note: To see changes click on the refresh icon.

Navigation bar with icons for back, forward, search, and refresh. The refresh icon is highlighted with a red box and a tooltip that says "Refresh".

**MT. SAN ANTONIO COLLEGE
2024-25 BUDGET TEMPLATE**

Fund: 13 - Unrestr Gen Fund Revenue Generated
Fund: 13110 - College Improvements

**MT. SAN ANTONIO COLLEGE
2024-25 BUDGET TEMPLATE**

Fund: 13 - Unrestr Gen Fund Revenue Generated
Fund: 13611 - Indirect Cost

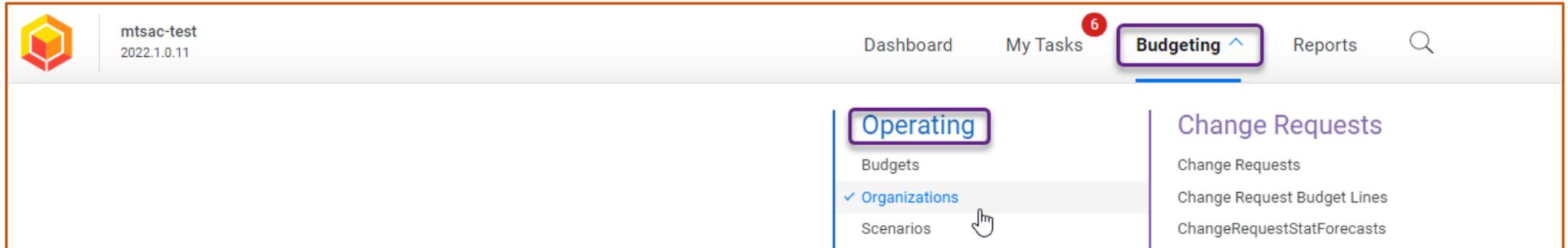
Fund	Org	Acct	Prog	Actv	Account Description	Organization Description	FTE	Range	Acct %	Salary	Adopted Budget 2023-24	Status Quo Budget 2024-25	Budget Changes 2024-25	Revised Status Quo Budget 2024-25
Expenses / Expenses														
13611	960700	211000	672000	2100	Classified Salaries-Unit A CA9360 Bland, Kimberly	Restricted Programs/Indirect Cost	1.000	CAR095B	100.00	95,344	91,581	95,344	0	95,344
13611	960700	215000	672000	2100	Classified Admin Salaries MC9930 Royce, Rosa	Restricted Programs/Indirect Cost	1.000	AD00023	15.00	39,092	37,984	39,092	0	39,092
13611	960700	321000	672000	2100	PERS Budget Holding	Restricted Programs/Indirect Cost					34,567	35,868	0	35,868
13611	960700	331000	672000	2100	OASDI, Budget Holding	Restricted Programs/Indirect Cost					8,033	8,336	0	8,336
13611	960700	335000	672000	2100	Medicare, Budget Holding	Restricted Programs/Indirect Cost					1,879	1,950	0	1,950
13611	960700	341000	672000	2100	Health and Welfare Benefits	Restricted Programs/Indirect Cost					28,921	28,921	0	28,921
13611	960700	351000	672000	2100	State Unemploy Budget Holding	Restricted Programs/Indirect Cost					65	67	0	67
13611	960700	381000	672000	2100	W/C Budget Holding	Restricted Programs/Indirect Cost					1,801	1,869	0	1,869
13611	960700	521000	672000		Travel and Conferences	Restricted Programs/Indirect Cost					10,000	10,000	5,000	15,000
13611	960700	561000	672000		Contracted Services	Restricted Programs/Indirect Cost					0	0	5,000	5,000
13611	960700	589000	672000		Other Services	Restricted Programs/Indirect Cost					185,169	178,553	(10,000)	168,553
13611	960700	794001	672000		Assigned Fund Bal-Revenue Generated	Restricted Programs/Indirect Cost					1,595,227	1,595,227	0	1,595,227
Expenses / Expenses Total											1,995,227	1,995,227	0	1,995,227
Revenues / Funding Sources														
13611	960700	889010	672000		Indirect Cost Recovery	Restricted Programs/Indirect Cost					400,000	400,000	0	400,000
Revenues / Funding Sources Total											400,000	400,000	0	400,000
Net Total											(1,595,227)	(1,595,227)	0	(1,595,227)

2024-25 BUDGET TEMPLATE Page 47

ORGANIZATIONS SEARCH (DETERMINE APPROVAL STAGE)

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

- Go to **Budgeting** from the top menu bar
- Click on **Organizations** under the **Operating** category.



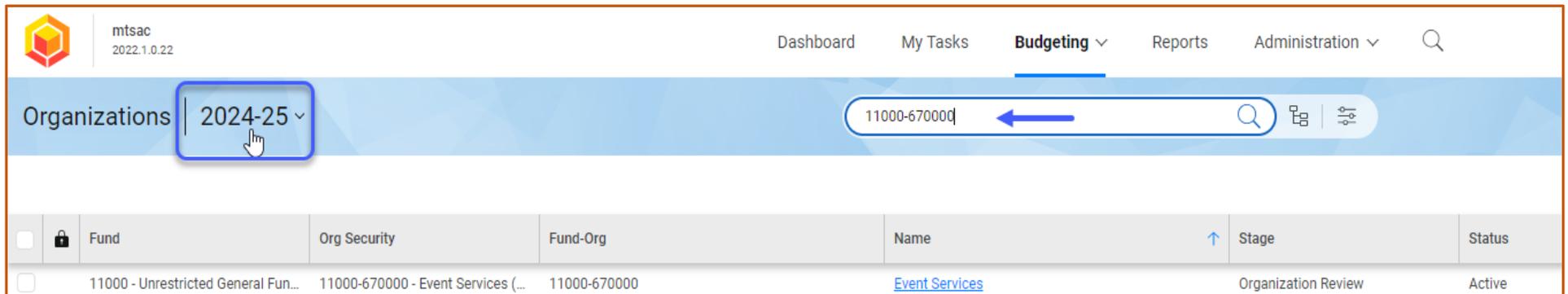
The screenshot shows the top navigation bar with 'Budgeting' selected. Below it, the 'Operating' category is expanded, and 'Organizations' is highlighted with a mouse cursor. The 'Change Requests' section is also visible on the right.

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.

Note: The search window works a lot like a Google search. You can search by Org name, Fund, or Fund-Org number and Qestica Budget will search all the information on the Organization to find a match. Add more key terms if you would like to narrow down your search.

Example: Organization 11000-670000 is in Unit/Grant Review



The screenshot shows the 'Organizations' search page. The 'Budgeting' menu is expanded, and the '2024-25' dropdown is selected. A search box contains '11000-670000'. Below the search bar is a table with the following data:

<input type="checkbox"/>	<input type="checkbox"/>	Fund	Org Security	Fund-Org	Name	↑	Stage	Status
<input type="checkbox"/>	<input type="checkbox"/>	11000 - Unrestricted General Fun...	11000-670000 - Event Services (...)	11000-670000	Event Services		Organization Review	Active

ORGANIZATIONS SEARCH (DETERMINE APPROVAL STAGE) (continued)

- To view all your organizations, do not enter a value in the search box (leave blank) and click on the “Search” icon.
- All Organizational budgets under your security access will be displayed.

The screenshot shows the MTSAC 2022.1.0.22 web application interface. The top navigation bar includes 'Dashboard', 'My Tasks', 'Budgeting', 'Reports', and 'Administration'. The main header displays 'Organizations | 2024-25' and a search bar labeled 'Search Organizations'. Below the header is a table of organizational units. The table has columns for 'Fund', 'Org Security', 'Fund-Org', 'Name', 'Stage', and 'Status'. The 'Fund-Org' and 'Stage' columns are highlighted with red boxes. The table contains 9 rows of data, each representing an organizational unit with its respective fund, security, name, stage, and status.

<input type="checkbox"/>		Fund	Org Security	Fund-Org	Name	Stage	Status
<input type="checkbox"/>		13651 - Risk Management-Safet...	13651-650000 - Safety and Risk ...	13651-650000	Safety and Risk Management	Fiscal Tentative	Active
<input type="checkbox"/>		13632 - Fingerprinting-Parking	13632-631000 - Parking Services...	13632-631000	Parking Services	Fiscal Tentative	Active
<input type="checkbox"/>		13631 - Parking-Facility Rental	13631-631000 - Parking Services...	13631-631000	Parking Services	Fiscal Tentative	Active
<input type="checkbox"/>		13630 - Printing Services	13630-663000 - Printing Service...	13630-663000	Printing Services	Fiscal Tentative	Active
<input type="checkbox"/>		13623 - Vehicle Surplus	13623-623000 - Transportation (...)	13623-623000	Transportation	Fiscal Tentative	Active
<input type="checkbox"/>		13621 - Custodial-Recycling	13621-625000 - Custodial (Fund ...)	13621-625000	Custodial	Fiscal Tentative	Active
<input type="checkbox"/>		13620 - Facilities Planning and ...	13620-620000 - Design and Con...	13620-620000	Design and Construction	Fiscal Tentative	Active
<input type="checkbox"/>		13611 - Indirect Cost	13611-611000 - Budget/Categori...	13611-611000	Budget/Categorical Programs/Audit	Organization Review	Active
<input type="checkbox"/>		13611 - Indirect Cost	13611-610000 - Fiscal Services (...)	13611-610000	Fiscal Services	Organization 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.

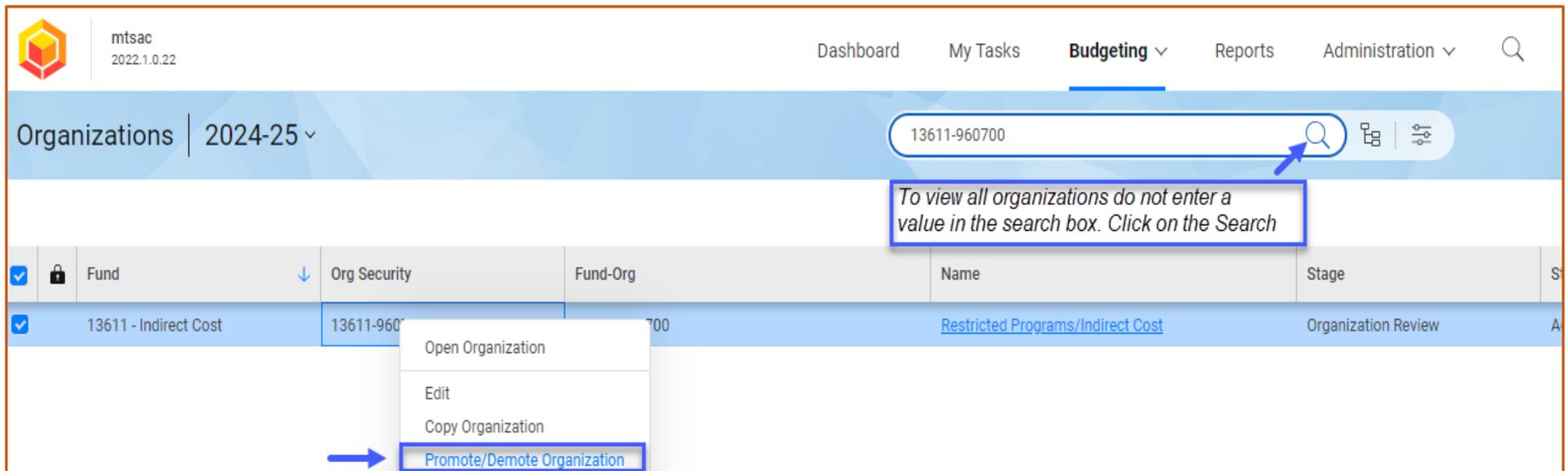
Note: Only Approving Managers, Deans, Directors or Vice Presidents and Presidents can Promote or Demote Organizations.

You will receive the following error message if you don't have permission to Promote/Demote Organizations.



Promoting a Single Organization

- Go to the **Budgeting** menu
- Select **Organizations** under **Operating**
- Search for the Organization (either by Fund-Org number or description) or select the Organization from the list if you are viewing all Organizations under your security access.
- Click on the button to the left of the Fund number.
- Hover over the line you selected with your mouse then right-click and select Promote/Demote Organization.



mtsac
2022.1.0.22

Dashboard My Tasks **Budgeting** Reports Administration

Organizations | 2024-25

13611-960700

To view all organizations do not enter a value in the search box. Click on the Search

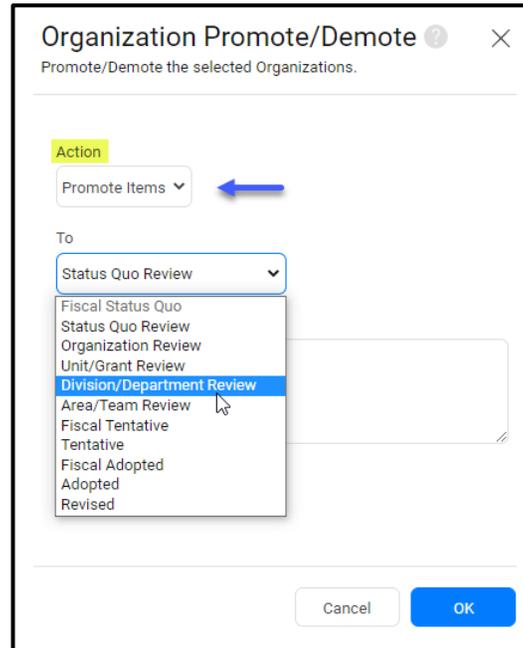
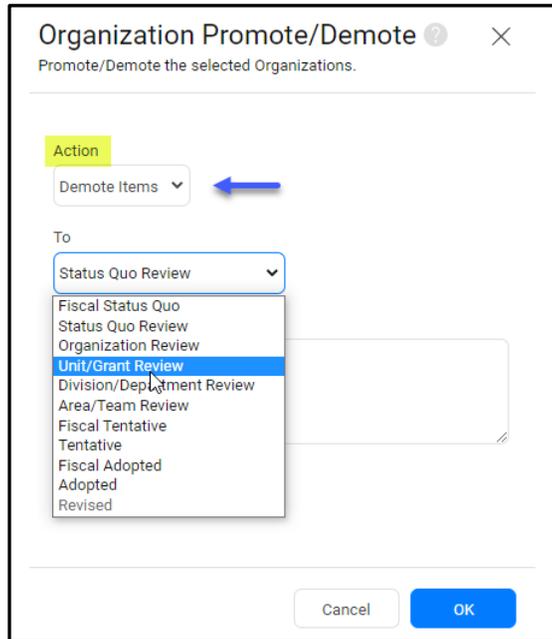
✓	🔒	Fund	Org Security	Fund-Org	Name	Stage
✓		13611 - Indirect Cost	13611-960700	700	Restricted Programs/Indirect Cost	Organization Review

Open Organization
Edit
Copy Organization
Promote/Demote Organization

PROMOTING/DEMOTING ORGANIZATIONS (continued)

- A pop-up window will appear.
- Under Action, select **Promote Items**
- Select the Level you want to Promote to
- Click 

Note: To **Demote** a Single Organization, follow the same Process and choose **Demote Items** under Action.



Batch Process Promotion or Demotion

The batch process automates promoting and demoting multiple Organization at once. It is recommended for Funds with multiple Organizations.

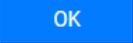
- Go to the **Budgeting** menu
- Select **Organizations** under **Operating**
- Search for the Fund you want to promote or select Funds from the list if you are viewing all Funds under your security access.
- Select the Fund-Org numbers you want to promote or click on the button  next to the lock icon to select all Organizations.

PROMOTING/DEMOTING ORGANIZATIONS (continued)

- Hover over any of the lines you selected with your mouse, then right-click and select Promote/Demote Organization

✓	🔒	Fund	Org Security	Fund-Org	Name	Stage	Status
✓		13621 - Custodial-Recycling	13621-625000 - Custodial (Fund ...	13621-625000	Custodial	Fiscal Tentative	Active
✓		13620 - Facilities Planning and ...	13620-620000 - Design and Con...	13620-620000	Design and Construction	Fiscal Tentative	Active
✓		13611 - Indirect Cost	13611-611000 - Budget/Categori...	13611-611000	Budget/Categorical Programs/Audit	Organization Review	Active
✓		13611 - Indirect Cost	13611-610000 - Fiscal Services (...	13611-610000	Fiscal Services	Organization Review	Active

A pop-up window will appear.

- Under Action select Promote Items
- Select Level you want to Promote to
- Click 

Note: To **Demote** Organizations with a batch process, follow the same process and select **Demote Items** under Action.

Organization Promote/Demote ? X

Promote/Demote the selected Organizations.

Action

Demote Items

To

Status Quo Review

- Fiscal Status Quo
- Status Quo Review
- Organization Review
- Unit/Grant Review
- Division/Department Review
- Area/Team Review
- Fiscal Tentative
- Tentative
- Fiscal Adopted
- Adopted
- Revised

Cancel OK

Organization Promote/Demote ? X

Promote/Demote the selected Organizations.

Action

Promote Items

To

Status Quo Review

- Fiscal Status Quo
- Status Quo Review
- Organization Review
- Unit/Grant Review
- Division/Department Review
- Area/Team Review
- Fiscal Tentative
- Tentative
- Fiscal Adopted
- Adopted
- Revised

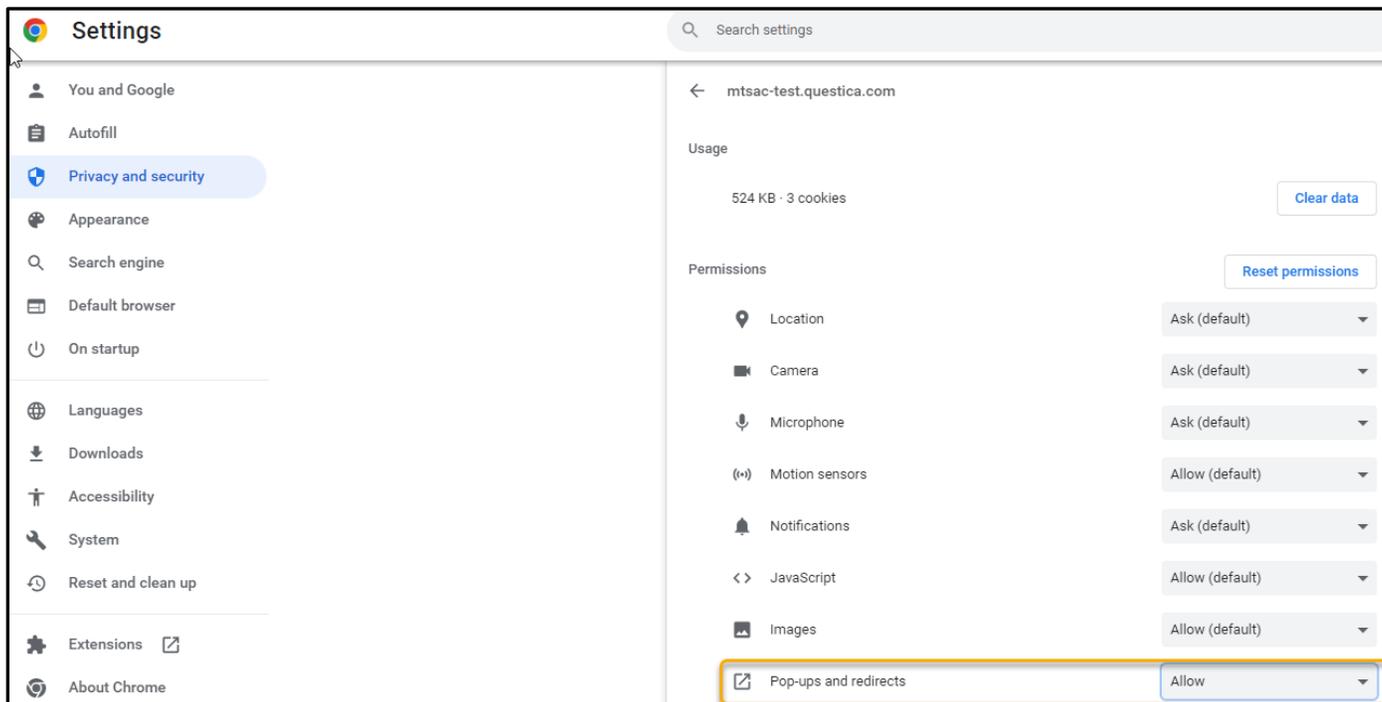
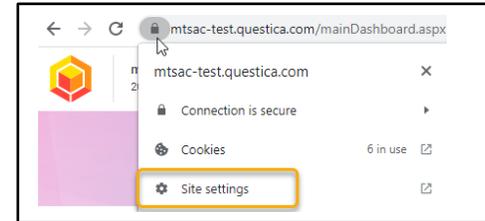
Cancel OK

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 creating 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 menu.
- In the site settings list, find **Pop-ups and redirects**.
- Select **Allow** in the drop-down across from Pop-ups and redirects.

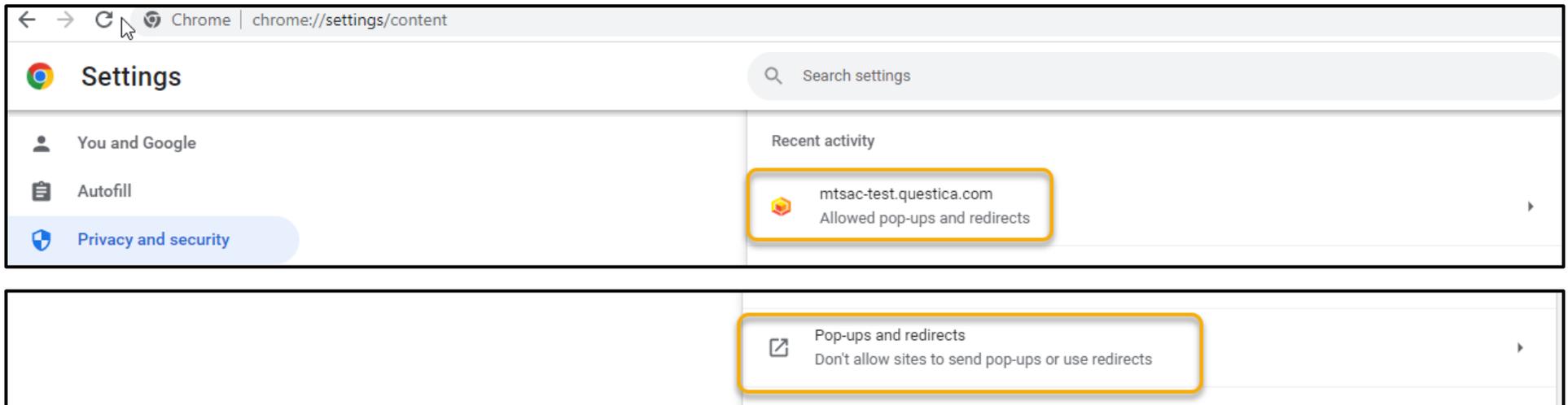


ALLOW POP-UPS IN CHROME FOR QUESTICA (continued)

Another option to allow pop-ups from Questica: If you see "**Pop up blocked**" appear in the address bar when you navigate to the site, click it. Then click on the link for the pop-up you want to see and select "**Always allow pop-ups and redirects from [site]**" and 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-Instructional Salaries
 - 230000-249999 Short-Term, Nonacademic Salaries, Overtime
 - 260000-269999 Hourly Instructional Aide Sal-Other
 - 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. Changes 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. Changes 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. Changes 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).