



2024

# BUDGET DEVELOPMENT 2024 QUESTICA PROCESS GUIDE

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

Maria Correia  
Alsace Kam  
Maria Kline  
Christine Lam  
Kim Bland  
Melanie Lazo  
Diana Morgan  
Catherine Nguyen  
Suzanne Ponce  
Priscilla Romero  
Yvette Shane  
Kevin Truong  
Emma Valenzuela  
Marisa Ziegenhohn

mcorreia1@mtsac.edu  
akam1@mtsac.edu  
mkline@mtsac.edu  
clam@mtsac.edu  
kleisure@mtsac.edu  
mlazo1@mtsac.edu  
dmorgan30@mtsac.edu  
cnguyen15@mtsac.edu  
sponce10@mtsac.edu  
promero27@mtsac.edu  
yshane@mtsac.edu  
ktruong36@mtsac.edu  
evalenzuela@mtsac.edu  
mziegenhohn@mtsac.edu



# Table of Contents

**Sections**

Introduction .....1

How to Log In to Questica .....2

Questica Home Page .....3

    Menu Bar Content .....5

Reports (Run and View Reports) .....6

    MtSAC Budget Template by Organization .....6

    MtSAC Budget Template by Fund .....8

    MtSAC Budget and Expenditure Comparative Report .....9

Change Request – Budget Changes.....10

Organizational Search (Determine Approval Stage).....16

Promoting/Demoting Organizations .....18

    Promote/Demote a Single Organization .....18

    Batch Process Promotion/Demotion .....19

Allow Pop-ups in Chrome for Questica .....21

Appendix A.....23



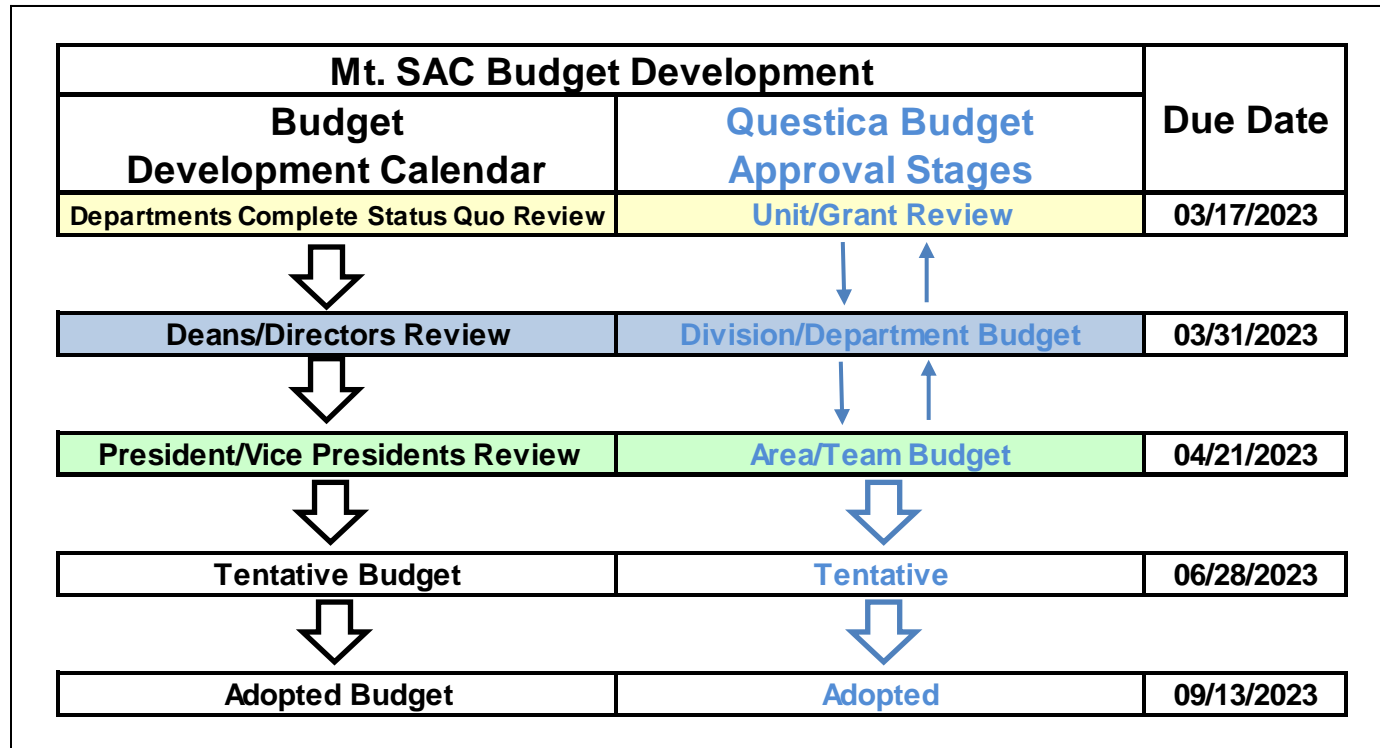
## INTRODUCTION

### 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

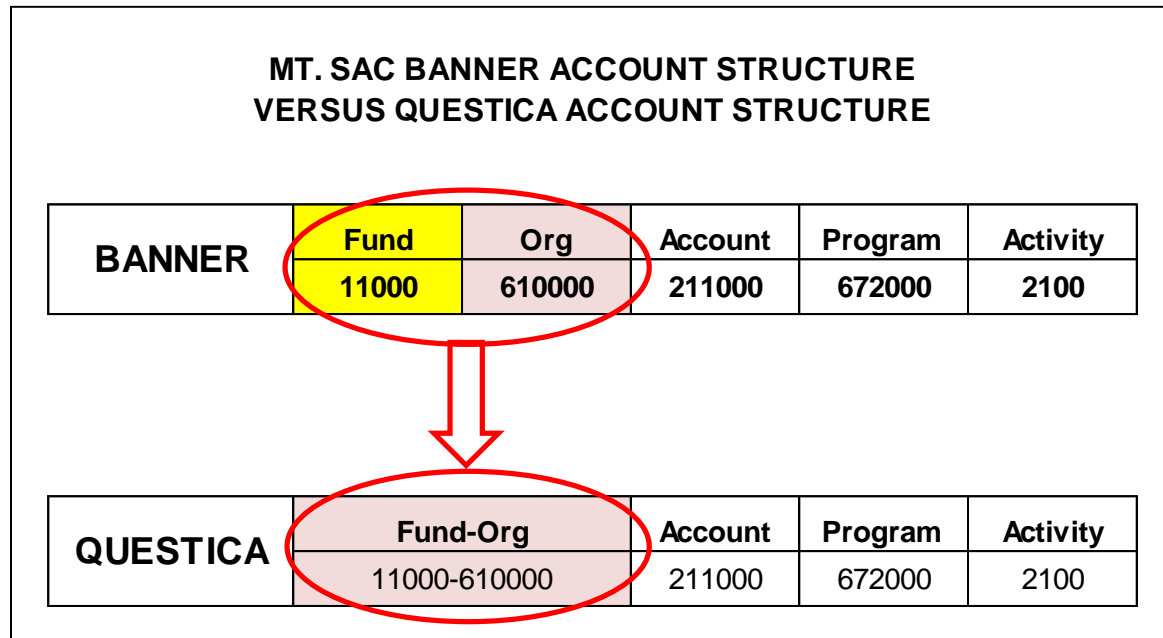
This manual will provide a guide of how to use the Questica budget software, particularly within the Reports and Operating menus.

## 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:



## 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](http://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 website's IT Applications section. At the top, the college's name is in a maroon header, followed by navigation links: Sign In, Search, Directory, Map, and Listen. Below this, a dark grey bar contains the text 'IT Applications' and a yellow arrow pointing to the 'Questica' link, which is highlighted with a yellow box. Other links in this bar include Environments, PROD, TEST, PPRD, UPGR, and RSCH. A link to a 'New Banner Homepage Video!' is also present. The main content area features three large, rounded rectangular boxes for different systems: Banner & DegreeWorks (purple), Argos & Data/Reports (red), and etrieve by Softdocs (teal). Each box includes a 'What's New?' link, an 'About' link, and a 'Login' button. Below these are three large, rounded buttons for logging into the PROD environment for each system. At the bottom of each box, there are three links with icons: 'Avoid Creating Duplicate IDs' for Banner, 'Report Creation' and 'Datablock Requests' for Argos, and 'Etrieve Resource Site', 'OmniCMS User Request Forms Now Available!', and 'Payroll Forms Now Available!' for etrieve.

Mt. San Antonio College

Sign In Search Directory Map Listen

IT Applications → Questica Environments PROD TEST PPRD UPGR RSCH

Discover the differences between the new and old Banner homepages by watching the [New Banner Homepage Video!](#)

**Banner & DegreeWorks**  
Ellucian Banner & DegreeWorks

What's New? About Login

Login to Banner **PROD** Environment

Avoid Creating Duplicate IDs

Learn the SGASADD Form

General Navigation Training

**Argos & Data/Reports**  
Argos & Data/Reports

What's New? About Login

Login to Argos **PROD** Environment

Report Creation

Datablock Requests

**etrieve™**  
by Softdocs  
SoftDocs Etrieve

What's New? About Login

Login to Etrieve **PROD** Environment

Etrieve Resource Site

OmniCMS User Request Forms Now Available!

Payroll Forms Now Available!

## QUESTICA HOME PAGE

The screenshot displays the Questica Home Page. At the top, a 'Menu Bar' is highlighted with a red box and an arrow pointing to it. The menu bar includes 'Dashboard', 'My Tasks' (with a red notification badge), 'Budgeting', and 'Reports'. Below the menu bar is a search bar with the placeholder text 'Search Anything [CTRL + SPACE]'. On the left side, there is a 'General' section with a dropdown arrow. In the center, there is a logo for 'MT. SAC Mt. San Antonio College'. To the right of the logo, a red box with an arrow points to the text 'Announcements will be posted under the General Dashboard'. Below the logo, there is a 'Welcome to Budget Development in Questica!' message. The main content area contains three sections: 'Budget Process for the Unrestricted General Fund:', 'Budget Process for Grants and Restricted Programs:', and 'Questica Budget Software:'. At the bottom, there is a timeline with dates from FEB 2023 to MAY 2023.

Menu Bar →

Dashboard My Tasks Budgeting Reports

Search Anything [CTRL + SPACE]

General ▾

MT. SAC  
Mt. San Antonio College

Announcements will be posted under the General Dashboard

Welcome to Budget Development in Questica!

We are happy to announce the budget development process for the 2023-24 fiscal year! In accordance with the budget review and development processes and to ensure budgets are reviewed regularly, a comprehensive review of all of the Status Quo Budgets is recommended to align the College's budget with actual expenditures. The following are essential items to consider.

**Budget Process for the Unrestricted General Fund:**

This budget process is for realigning your status quo or operating budget to your anticipated expenditure needs for 2023-24. If the budget is increased in one budget line item under a department (Org), it needs to be decreased in another budget line item under a department (Org). This process will save Budget Managers from having to submit budget transfers, which will expedite your purchases during 2023-24.

**Budget Process for Grants and Restricted Programs:**

Please work with your assigned Fiscal Specialist as budget line items for Grants and Restricted Programs may be increased or decreased by providing supporting documentation that reflects the total funded allocation. However, a sufficient budget must be provided for all the permanent employee positions. Since the final funding allocation may not be known when the budget is submitted, please provide your best estimate. Fiscal Services will continue working with the Grant and Restricted Program Budget Managers as updated information becomes available.

**Questica Budget Software:**

The Tentative Budget will be developed using the Questica budget software, which includes:

- The status quo or operating budget for each Organization or Grant/Restricted Program
- Budget approval process

FEB 2023 13 MAR APR MAY

- 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.

This screenshot shows the bottom portion of the Questica Home Page. It features a timeline with dates from FEB 2023 to MAY 2023. A red box highlights a specific date, 'Fri, Mar 17, 2023', with the text 'FY2023-24 Unit/Grant Review Comp...' above it. The timeline also shows '6 records' and a '13' icon. The bottom of the screen displays the Windows taskbar with the time '10:36 AM'.

6 records

FY2023-24 Unit/Grant Review Comp...

Fri, Mar 17, 2023

FEB 2023 13 MAR APR MAY

10:36 AM



## MENU BAR CONTENT

Your name is displayed on the top right corner.

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

mtsac-test 2022.1.0.11

Dashboard My Tasks Budgeting Reports

Search Anything [CTRL + SPACE]

Browse: Google like search bar allows you to search for what you are looking for by entering a keyword. i.e. Org number

675000

Organization | 2024 | 13675-675000 - Box Office

**Dashboard:** Announcements and Messages are displayed in this section.

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

My Tasks

Search Tasks

Current Tasks All Deadlines

All Tasks Current Tasks Future Tasks n

Budget Year	Task	Stage
2023-24	<a href="#">11000-670000 - Event Services</a>	Unit/Grant Review
2023-24	<a href="#">11000-671000 - Performing Arts Operations</a>	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.

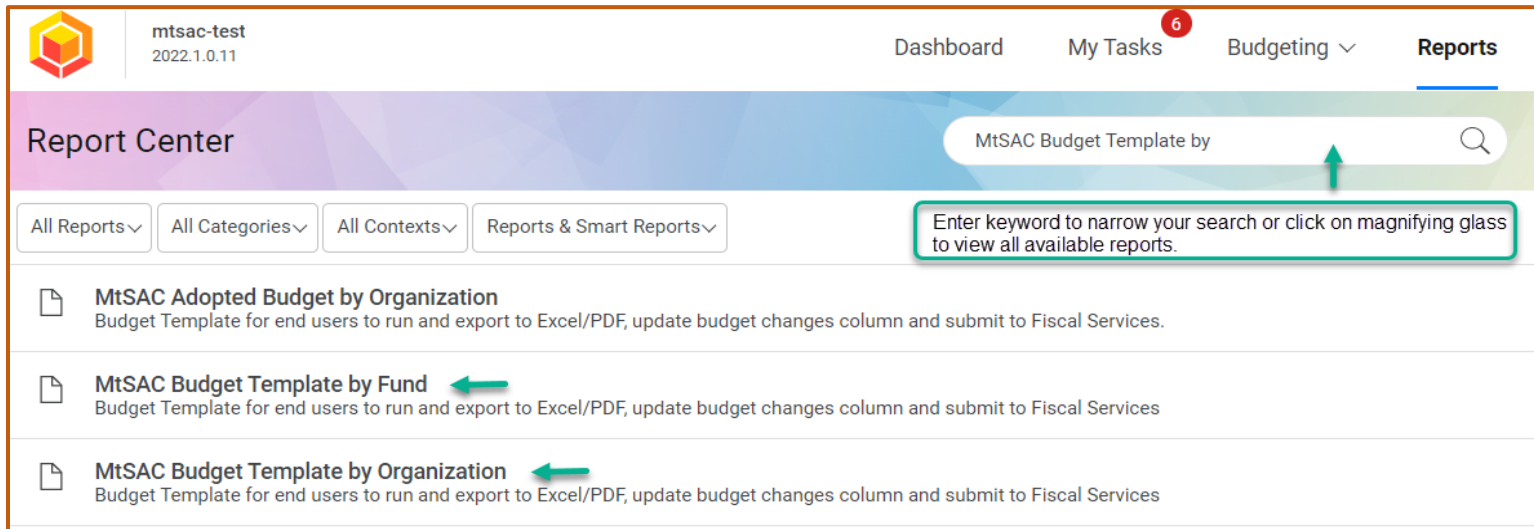
**Other:** Bookmarks and Notifications are displayed next to your name in the top right corner.

Notifications

Bookmarks

## REPORTS

Run and View available reports.



### 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.

#### 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
- **Org Security:** Check All Items
- **Organization:** Check All Items
- Click on the **Run Report** button

A screenshot of a 'Parameters' selection window. It has a title bar 'Parameters' and a close button. The window contains several dropdown menus and buttons. The 'Auto-Fill' dropdown is set to 'Custom...'. The 'Budget Year' dropdown is set to '2023-24'. The 'Fund Type' dropdown is set to '1 selected'. The 'Fund' dropdown is set to '1 selected'. The 'Area/Team' dropdown is set to 'All (10) selected'. The 'Org Security' dropdown is set to '5 selected'. The 'Organization' dropdown is set to '5 selected'. At the bottom, there is a 'Standard Parameters' dropdown and a large blue 'Run Report' button.

## REPORTS (continued)

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

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.



MT. SAN ANTONIO COLLEGE														
2023-24 BUDGET TEMPLATE														
Fund Type: 11 - Unrestricted General Fund														
Organization: 671000 - Performing Arts Operations														
Fund	Org	Acct	Prog	Actv	Account Description	Organization Description	FTE	Range	Acct %	Salary	Adopted Budget 2022-23	Status Quo Budget 2023-24	Budget Changes 2023-24	Revised Status Quo Budget 2023-24
11000	671000	563000	683000		Equipment Rental and Leases	Performing Arts Operations					13,000	13,000	0	13,000
11000	671000	564000	683000		Repairs	Performing Arts Operations					6,396	6,396	0	6,396
11000	671000	582000	683000		Mandated and Misc Fees	Performing Arts Operations					17,800	17,800	0	17,800
11000	671000	584000	683000		Computer/Technlgy Related Serv	Performing Arts Operations					23,855	23,855	0	23,855
11000	671000	589000	683000		Other Services	Performing Arts Operations					8,573	500	0	500
					P.I.P.-P0068061-\$2,850									
					P.I.P.-P0073482-\$1,000									
					P.I.P.-P0073649-\$4,223									
11000	671000	589200	683000		Services for Catering/Prom Items	Performing Arts Operations					1,000	1,000	0	1,000
11000	671000	641200	683000		New Equipment-\$500 to \$999	Performing Arts Operations					7,500	7,500	0	7,500
11000	671000	641500	683000		New Equipment IT-\$500 to \$999	Performing Arts Operations					8,235	7,500	0	7,500
					P.I.P.-P0072704-\$735									
11000	671000	641600	683000		New Equipment IT-\$1,000 to \$4,999	Performing Arts Operations					10,000	10,000	0	10,000
11150	671000	521000	683000		Travel and Conferences	Performing Arts Operations					2,000	2,000	0	2,000
Expenses / Expenditure Total											1,233,290	1,253,512	0	1,253,512
Net Total											(1,233,290)	(1,253,512)	0	(1,253,512)

2023-24 BUDGET TEMPLATE

Page 4

## 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)
- **Org Security:** Check All Items
- **Organization:** Check All Items
- Click on the **Run Report** button

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

- Auto-Fill: Custom...
- Budget Year: 2023-24
- Fund Type: Select (1 selected)
- Fund: Select (1 selected)
- Area/Team: Select (All (10) selected)
- Org Security: 5 selected
- Organization: 5 selected
- Standard Parameters: (dropdown arrow)
- Run Report button

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 2023-24 BUDGET TEMPLATE														
Fund: 17 - Restricted General Fund														
Fund: 17800 - Lottery-Restricted														
Fund	Org	Acct	Prog	Actv	Account Description	Organization Description	FTE	Range	Acct %	Salary	Adopted Budget 2022-23	Status Quo Budget 2023-24	Budget Changes 2023-24	Revised Status Quo Budget 2023-24
<b>Expenses / Expenditure</b>														
17800	671000	431000	100400		Instr Supplies and Materials	Performing Arts Operations					7,563	0	0	0
17800	672000	431000	613000		Instr Supplies and Materials	Broadcast Services					10,588	0	0	0
<b>Expenses / Expenditure Total</b>											18,151	0	0	0
<b>Net Total</b>											(18,151)	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 2020-21 and 2021-22; and budget, actuals, and commitments (requisitions, purchase orders, and purchase orders change notices) for the fiscal year 2022-23.

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.

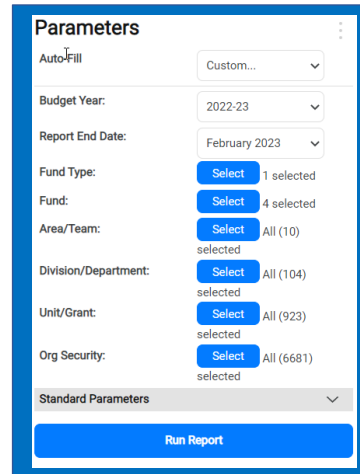
Report Selection Criteria will appear. 

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



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

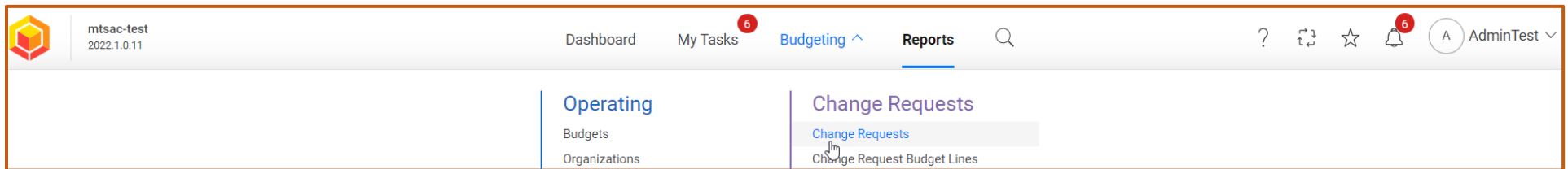
You may download the reports in the format of your choice (Excel or PDF) to determine the budget changes needed to realign your budgets with planned expenditures. The procedures for budget changes are explained in the next section.

## 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.**

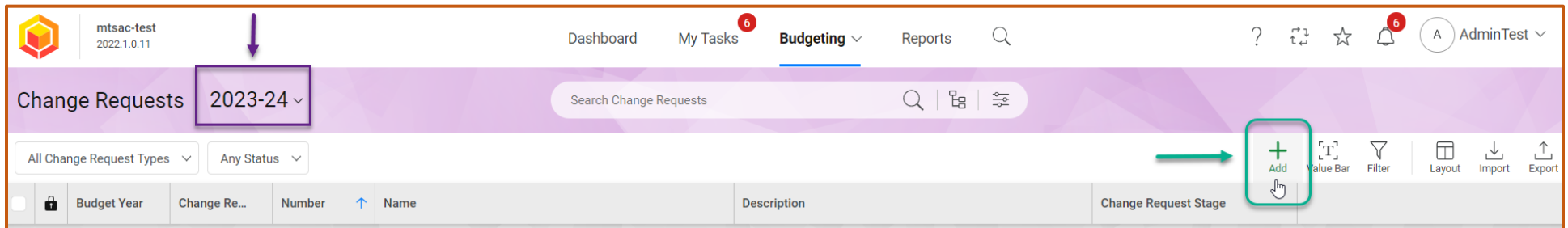
To process a budget change:

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

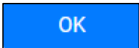


**Budget Year:** Select Budget Development **Fiscal Year**

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 2024 Change Request ?

×

Create a new Change Request for budgeting.

Number \*

AUTO

Org Security \*

11000-670000 - Event Services (Fund 11000) ▾

Change Request Type \*

Budget Changes ▾

Name

14 of 100

Budget Changes

Cancel

OK

This will open another window tab.

BUDGET CHANGES ENTRY

⋮

🔒

☆

🔔

💬

2023-24 | 2024-000018 - Budget Changes | Main (Active) ▾

Promote

General ▾

Operating ▾

Change Request Information

Save

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

2023-24 | 2024-000018 - Budget Changes | Main (Active) ▼

Promote

General ▼ | Operating ▼

Change Request Information Save

Name

Budget Changes

Number \*

2024-000018

Change Request Type \*

Budget Changes ▼

Publish Date

Description

Fund 11000 - Unrestricted General Fund

Comments

To provide funds for consultants and conference and travel for staff to attend Spring 2024 Training.

Justification

95% of Contract

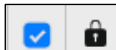
Org Security \*

11000-670000 - Event Services (Fund 11000) ▼



## CHANGE REQUEST – BUDGET CHANGES (continued)

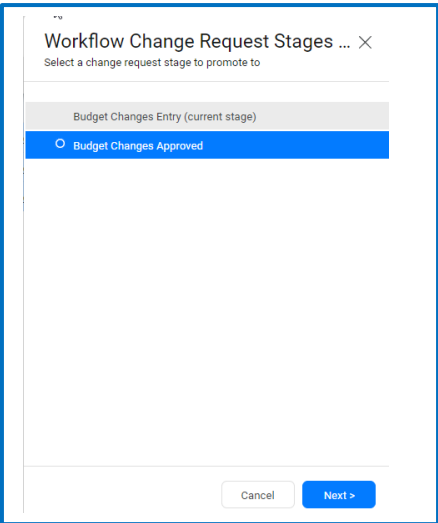
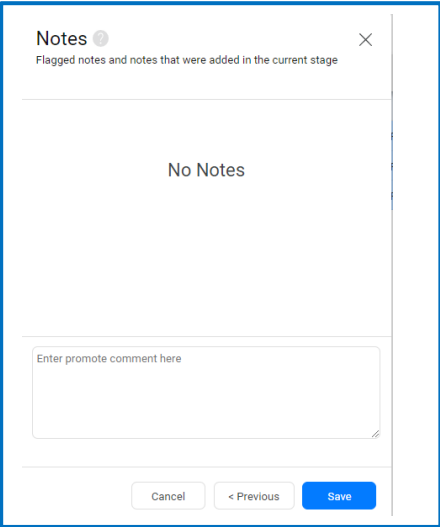
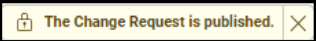
- Go to **Operating** menu – Select Change Request Budget Lines
- Click on the **+ Add** icon to add a budget line

- 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**.

2024
100
400
500
(1,000)

Account Structure	Organization	Account	Program	Activ...	Desc...	One Time	2024
11000-670000-451000-683000-	11000-670000 - Event Services	451000 - Supplies	683000 - C...			✓	(1,000)
11000-670000-521000-683000-	11000-670000 - Event Services	521000 - Travel and Conferences	683000 - C...			✓	500
11000-670000-511000-683000-	11000-670000 - Event Services	511000 - Consultants	683000 - C...			✓	500

CHANGE REQUEST – BUDGET CHANGES (continued)

- A pop-up window will pop up – Select Budget Changes Approved, then click **Next >** The Workflow Change Request Stages pop-up window shows a list of stages. 'Budget Changes Entry (current stage)' is highlighted in grey, and 'Budget Changes Approved' is selected with a blue circle. At the bottom are 'Cancel' and 'Next >' buttons.
- A second window will pop-up. Click **Save** The Notes pop-up window has a title bar 'Notes' and a subtitle 'Flagged notes and notes that were added in the current stage'. The main area says 'No Notes'. At the bottom is a text input field 'Enter promote comment here' and buttons 'Cancel', '< Previous', and 'Save'.
- You should see a message at the top middle of the screen if your Budget Change Entry was published. The message is a yellow box with a lock icon, the text 'The Change Request is published.', and a close 'X' button.

General ▾ • **Operating** ▾ Published 02/06/2023 12:46 PM

Operating Budget The Change Request is published. X

Annual ▾ 1 YR ▾ 2024 ▾ 0 ▾ | [T] | Filter | Layout | Import | Export

Grid View Display Forecast Year Precision Value Bar

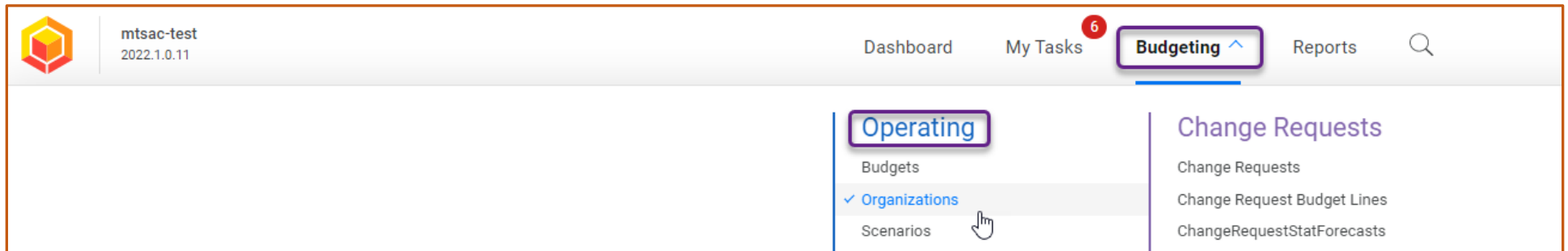
Account Structure	Organization	Account	Program	Activity
Account Type: Expenses / Expenditure				
<input type="checkbox"/> 11000-670000-521000-683000-	11000-670000 - Event Services	521000 - Travel and Conferences	683000 - Community Use of Faci...	
<input type="checkbox"/> 11000-670000-511000-683000-	11000-670000 - Event Services	511000 - Consultants	683000 - Community Use of Faci...	
<input type="checkbox"/> 11000-670000-451000-683000-	11000-670000 - Event Services	451000 - Supplies	683000 - Community Use of Faci...	



## 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.

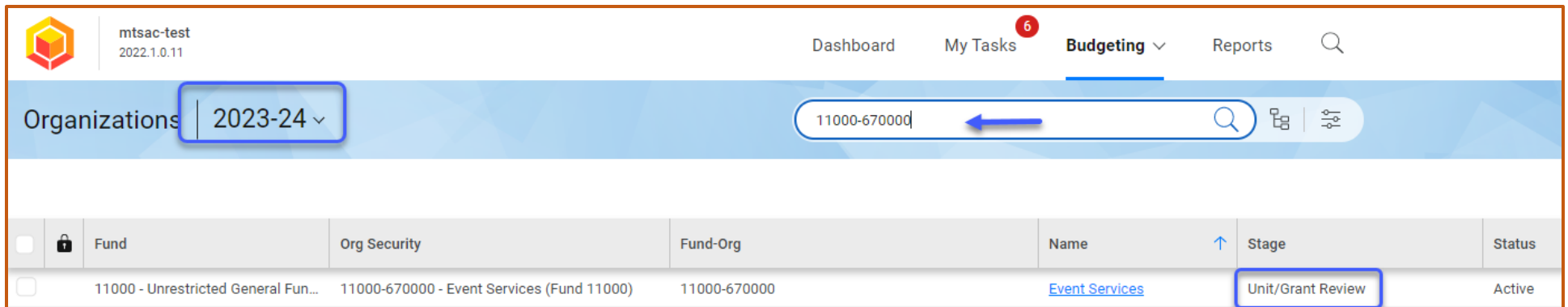


**Budget Year:** Select the fiscal year for the budget being developed

- 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



## 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.

 mtsac-test  
2022.1.0.11

DashboardMy Tasks <sup>6</sup>Budgeting ▼Reports

Search Organizations

	Fund	Org Security	Fund-Org	Name	Stage	Status
<input type="checkbox"/>	11000 - Unrestricted General Fun...	11000-670000 - Event Services (Fund 11000)	11000-670000	<a href="#">Event Services</a>	Unit/Grant Review	Active
<input type="checkbox"/>	11000 - Unrestricted General Fun...	11000-671000 - Performing Arts Operations (F...	11000-671000	<a href="#">Performing Arts Operatio...</a>	Unit/Grant Review	Active
<input type="checkbox"/>	11000 - Unrestricted General Fun...	11000-672000 - Broadcast Servicess (Fund 110...	11000-672000	<a href="#">Broadcast Services</a>	Unit/Grant Review	Active
<input type="checkbox"/>	13674 - Campus Facility Rentals	13674-674000 - Campus Facility Rentals (Fund ...	13674-674000	<a href="#">Campus Facility Rentals</a>	Unit/Grant Review	Active
<input type="checkbox"/>	13675 - Box Office	13675-675000 - Box Office (Fund 13675)	13675-675000	<a href="#">Box Office</a>	Unit/Grant Review	Active
<input type="checkbox"/>	13676 - Video Production	13676-676000 - Video Production (Fund 13676)	13676-676000	<a href="#">Video Production</a>	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.

*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.*

mtsac-test.questica.com says  
User does not have permission to promote this Organization

OK

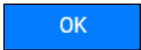
### Promoting a Single Organization

- 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.

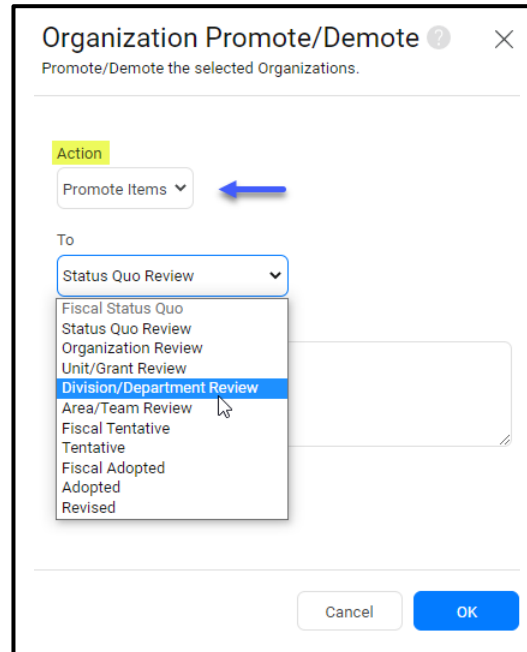
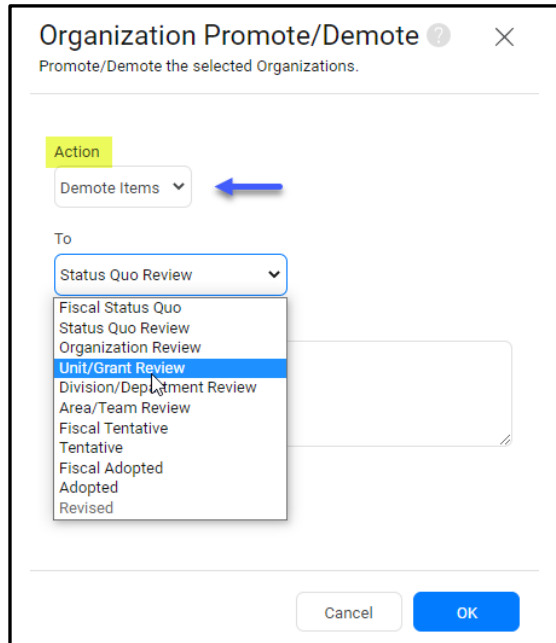
The screenshot shows the 'Organizations' page in the 'Budgeting' menu. The page header includes the 'mtsac-test' logo and version '2022.1.0.11'. The navigation bar shows 'Dashboard', 'My Tasks' (with a red notification badge '6'), 'Budgeting' (selected), and 'Reports'. The main content area is titled 'Organizations' with a dropdown for '2023-24'. A search bar is present with a tooltip: 'To view all organizations do not enter a value in the search box. Click on the Search Icon'. Below the search bar is a table of organizations. The first row is selected, and a context menu is open over it, showing options: 'Open Organization', 'Edit', 'Copy Organization', 'Promote/Demote Organization' (highlighted), and 'Copy Row to Clipboard'. The table columns are: Fund, Org Security, Fund-Org, Name, and Stage.

Fund	Org Security	Fund-Org	Name	Stage
11000 - Unrestricted General Fund-Operating	11000-670000 - Event Services (Fund 11000)	11000-670000	<a href="#">Event Services</a>	Unit/Grant Review
11000 - Unrestricted	11000-671000 - Performing Arts Operations (Fund 11000)	11000-671000	<a href="#">Performing Arts Operations</a>	Unit/Grant Review
11000 - Unrestricted	11000-672000 - Broadcast Services (Fund 11000)	11000-672000	<a href="#">Broadcast Services</a>	Unit/Grant Review
13674 - Campus Facility Rentals	13674-674000 - Campus Facility Rentals (Fund 13674)	13674-674000	<a href="#">Campus Facility Rentals</a>	Unit/Grant Review
13675 - Box Office	13675-675000 - Box Office (Fund 13675)	13675-675000	<a href="#">Box Office</a>	Unit/Grant Review
13676 - Video Production	13676-676000 - Video Production (Fund 13676)	13676-676000	<a href="#">Video Production</a>	Unit/Grant Review

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

## PROMOTING/DEMOTING ORGANIZATIONS (continued)

mtsac-test  
2022.1.0.11

Dashboard My Tasks **Budgeting** Reports

Organizations | 2023-24 ▾

11000

	Fund	Org Security	Fund-Org	Name	Stage	Status
<input checked="" type="checkbox"/>	11000 - Unrestricted General Fund-Ongoing	11000-672000 - Broadcast Services (Fund 11000)	11000-672000	<a href="#">Broadcast Services</a>	Unit/Grant Review	Active
<input checked="" type="checkbox"/>	11000 - Unrestricted General Fund-Ongoing	11000-670000 - Event Services (Fund 11000)	11000-670000	<a href="#">Event Services</a>		Active
<input checked="" type="checkbox"/>	11000 - Unrestricted General Fund-Ongoing	11000-671000 - Performing Arts Operations (Fund 11000)	11000-671000	<a href="#">Performing Arts Operations</a>		Active

Copy Organization  
Promote/Demote Organization  
Lock

A pop-up window will appear.

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

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

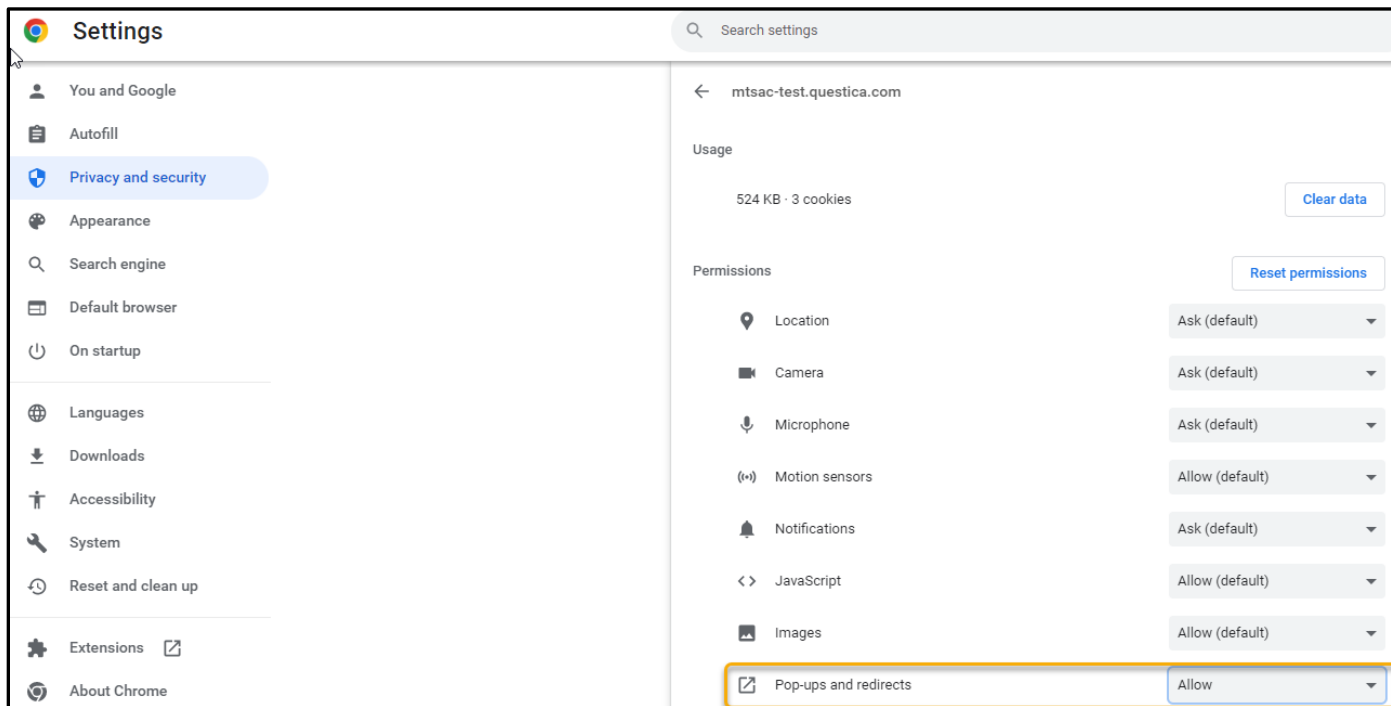
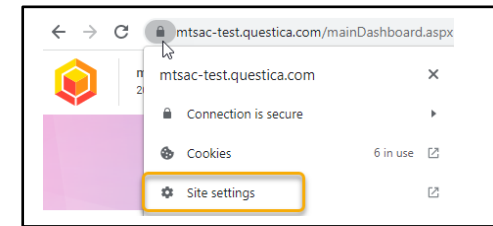


## ALLOW POP-UPS IN CHROME FOR QUESTICA

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.

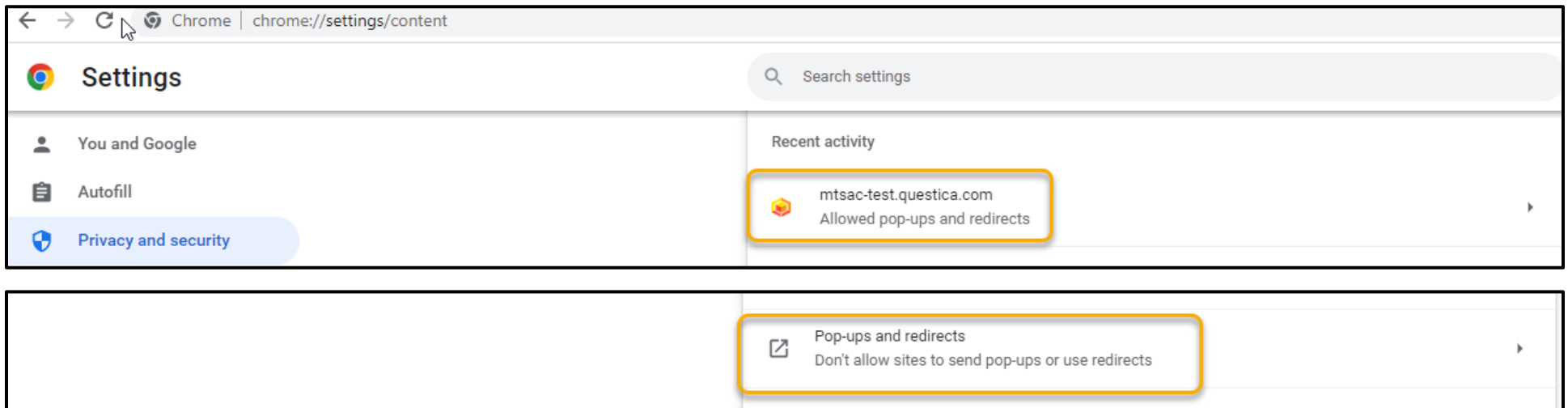


## ALLOW POP-UPS IN CHROME FOR QUESTICA (continued)

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).