



2024

BUDGET DEVELOPMENT 2024 QUESTICA PROCESS GUIDE

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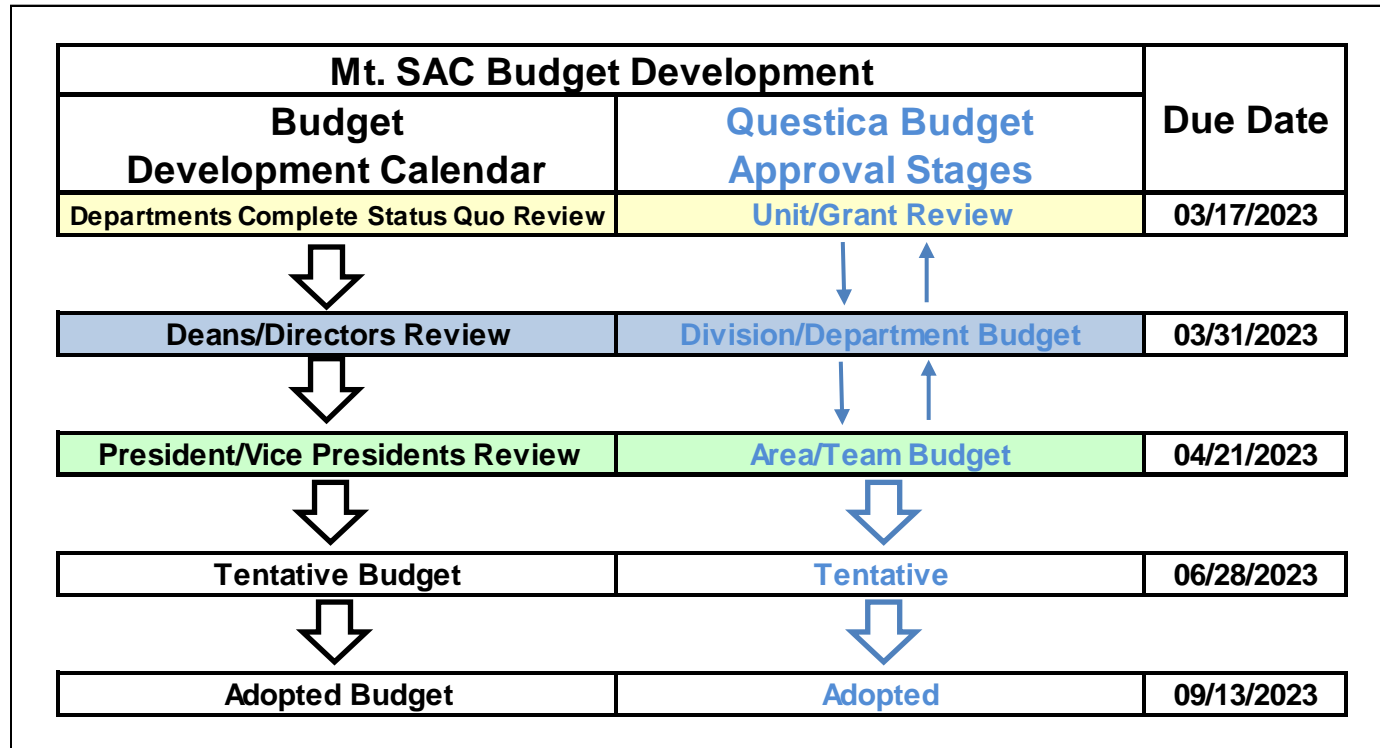
INTRODUCTION

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 menu with 'Questica' highlighted by a yellow box and an arrow. Other menu items include 'Environments', 'PROD', 'TEST', 'PPRD', 'UPGR', and 'RSCH'. A search bar and utility links for 'Sign In', 'Directory', 'Map', and 'Listen' are also present. The main content area features three large service tiles: 'Banner & DegreeWorks', 'Argos & Data/Reports', and 'etrieve by Softdocs'. Each tile has a 'Login to [Service] PROD Environment' button and a 'What's New?' section with links to various resources like 'Avoid Creating Duplicate IDs', 'Report Creation', and 'Etrieve Resource Site'.

QUESTICA HOME PAGE

The screenshot displays the Questica Home Page interface. At the top left, there is a logo and the text "mtsac-test 2022.1.0.11". A "Menu Bar" is highlighted with a red box and an arrow, containing "Dashboard", "My Tasks" (with a notification badge), "Budgeting", and "Reports". To the right of the menu bar are navigation icons: a question mark, refresh, star, and a notification bell with a "11" badge, followed by a user profile icon labeled "AdminTest". Below the menu bar is a search bar with the placeholder text "Search Anything [CTRL + SPACE]". On the left side, there is a "General" menu item with a dropdown arrow and a hand cursor. In the center, there is a logo for "MT. SAC Mt. San Antonio College". A red box with the text "Announcements will be posted under the General Dashboard" and a red arrow points to the main content area. The main content area features a heading "Welcome to Budget Development in Questica!" followed by a paragraph of text. Below this, there are three sections: "Budget Process for the Unrestricted General Fund:", "Budget Process for Grants and Restricted Programs:", and "Questica Budget Software:". At the bottom of the page, there is a timeline navigation bar showing months from FEB 2023 to MAY, with a calendar icon and a date indicator for "13".

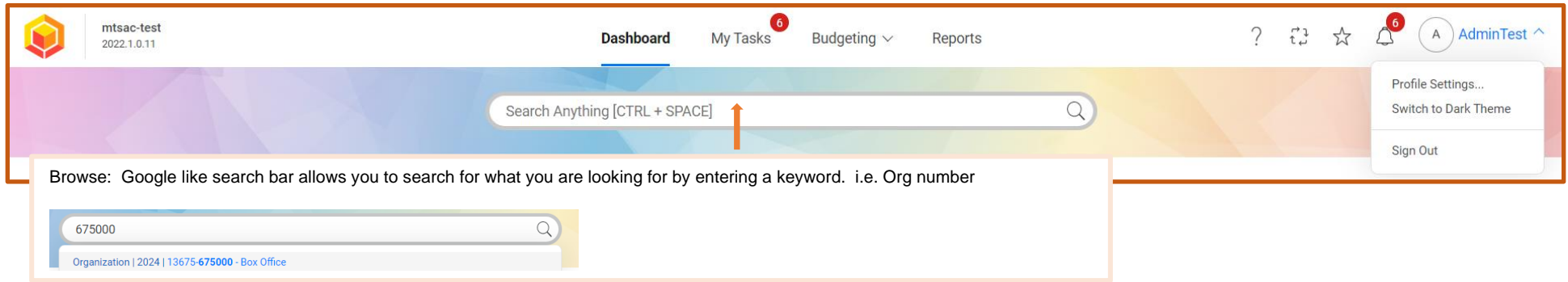
- The Menu Bar is displayed at the top middle of the screen.
- Announcements are posted under the Dashboard Menu.
- A timeline with deadlines is displayed at the bottom of the screen for your reference.

This screenshot shows the Windows taskbar at the bottom of the screen. The Questica application window is active, displaying the text "6 records" and "FY2023-24 Unit/Grant Review Comp...". The system tray shows the date "Fri, Mar 17, 2023". The taskbar includes navigation icons for back, forward, and home, as well as a search icon. The system tray also shows the current date and time, "10:36 AM".

MENU BAR CONTENT

Your name is displayed on the top right corner.

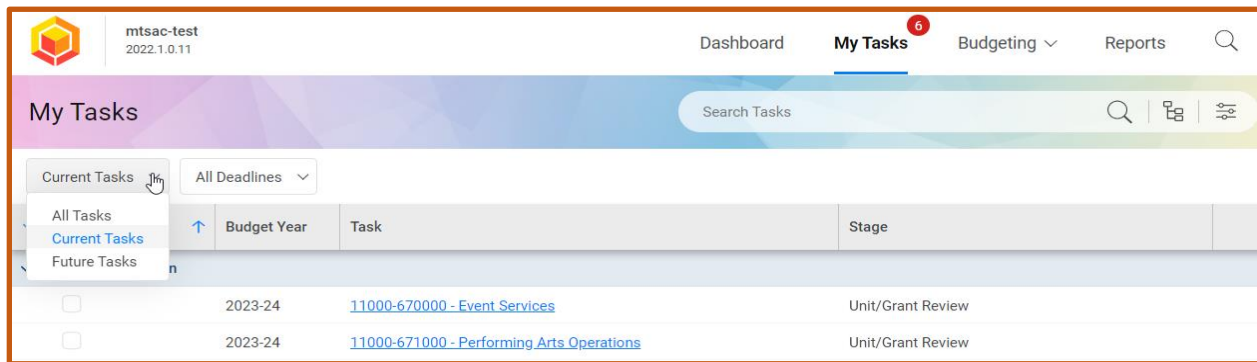
User profile settings and Sign Out can be found in **this section**.



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". In the center, there are navigation links: "Dashboard", "My Tasks" (with a red notification badge), "Budgeting" (with a dropdown arrow), and "Reports". On the right, there are icons for help, refresh, star, and a notification bell (with a red badge), followed by a user profile icon labeled "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 search bar contains the text "675000" and a magnifying glass icon. Below the search bar, there is a breadcrumb trail: "Organization | 2024 | 13675-675000 - Box Office". To the right of the search bar, 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.



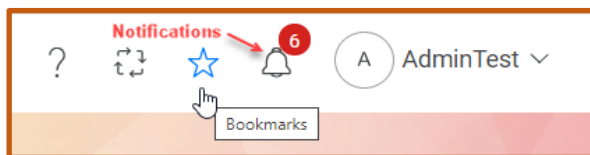
The screenshot shows the "My Tasks" section of the application. At the top, there is a navigation bar with "Dashboard", "My Tasks" (with a red notification badge), "Budgeting" (with a dropdown arrow), and "Reports". Below the navigation bar is a search bar with the placeholder text "Search Tasks" and icons for search, list, and filter. Below the search bar, there is a dropdown menu with options: "Current Tasks", "All Deadlines", "All Tasks", "Current Tasks" (selected), and "Future Tasks". Below the dropdown menu 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.

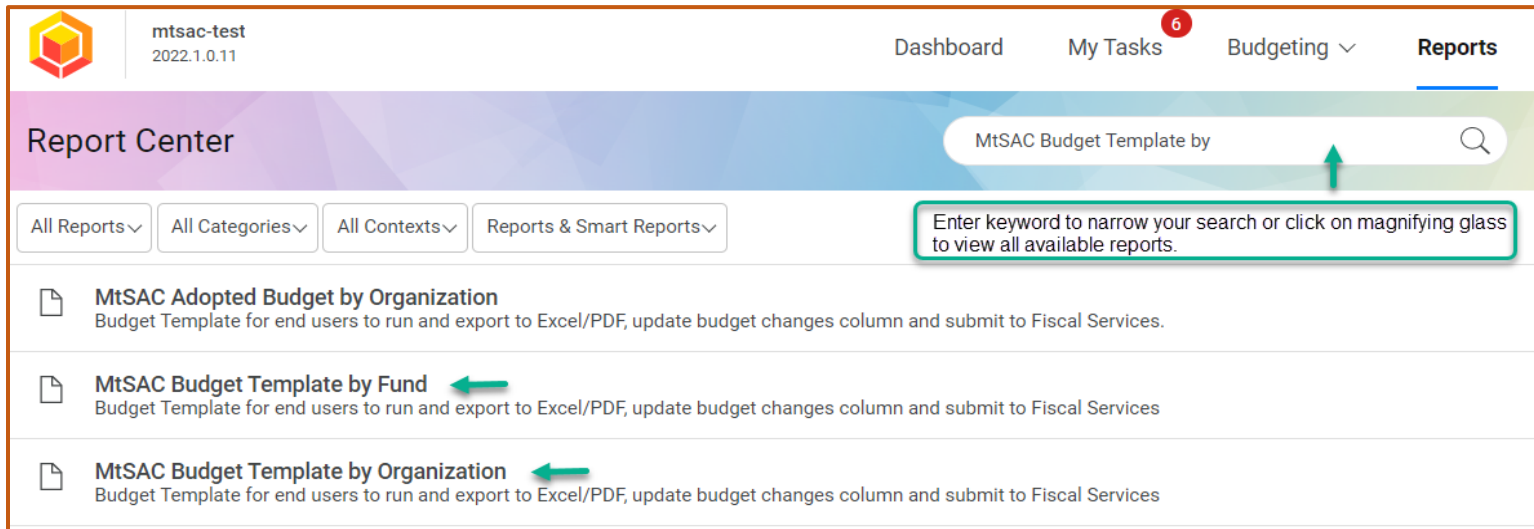
Other: Bookmarks and Notifications are displayed next to your name in the top right corner.



The screenshot shows a close-up of the top right corner of the application. It features a user profile icon labeled "AdminTest" with a dropdown arrow. To the left of the profile icon are several icons: a question mark, a refresh icon, a star icon, and a notification bell icon (with a red badge). A callout box points to the notification bell icon with the text "Notifications". Below the notification bell icon is a callout box with the text "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

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)

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 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
Expenses / Expenditure														
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
Expenses / Expenditure Total											18,151	0	0	0
Net Total											(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 **Run Report** button.

Report Selection Criteria will appear. →

The screenshot shows a 'Parameters' window with the following settings:

- Auto-Fill: Custom...
- Budget Year: 2022-23
- Report End Date: February 2023
- Fund Type: Select 1 selected
- Fund: Select 4 selected
- Area/Team: Select All (10) selected
- Division/Department: Select All (104) selected
- Unit/Grant: Select All (923) selected
- Org Security: Select All (6681) selected
- Standard Parameters: (dropdown arrow)
- Run Report button

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 **Run Report** button

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

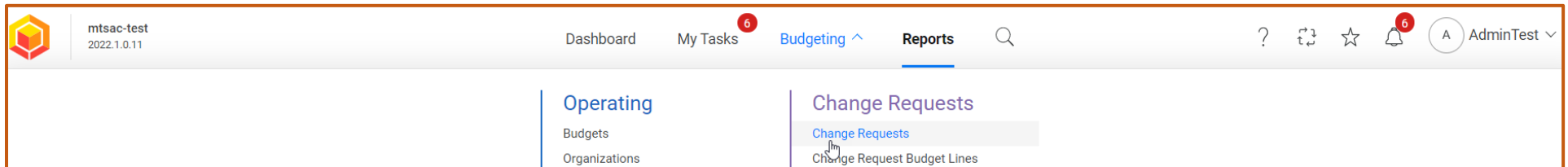
You may download the reports in the format of your choice (Excel or PDF) to determine the budget changes needed to realign your budgets with planned expenditures. The procedures for budget changes are explained in the next section.

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.**

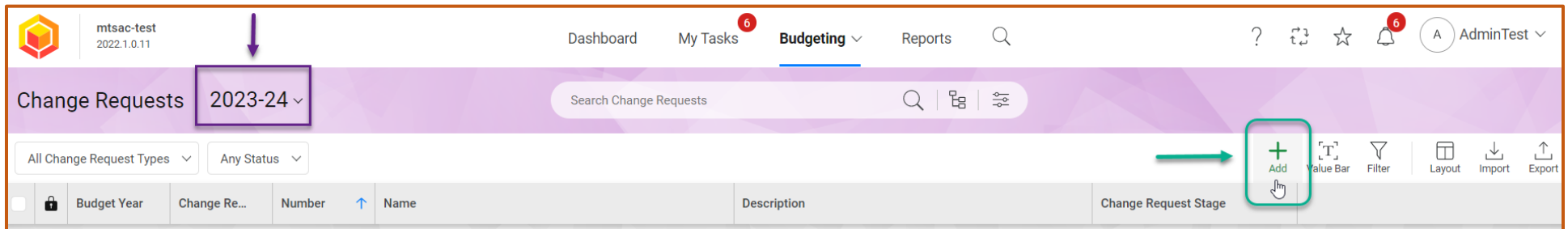
To process a budget change:

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




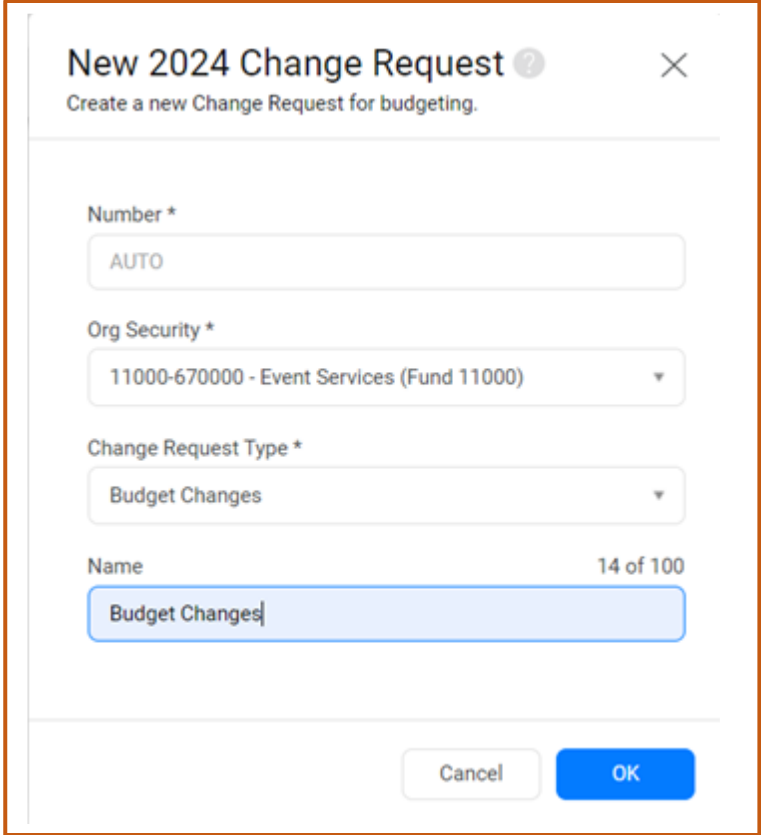
Budget Year: Select Budget Development **Fiscal Year**

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

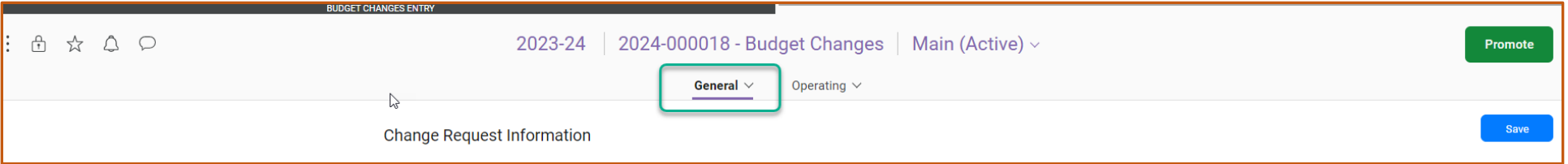
Org Security *
11000-670000 - Event Services (Fund 11000) ▼

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) v

General v Operating v


Change Request Information

Promote 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  button

BUDGET CHANGES ENTRY

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

General ▾ • Operating ▾

Change Request Information

Name

Number * Change Request Type *

Publish Date

Description



Comments

Justification

Org Security *

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 .

2024	Balance
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

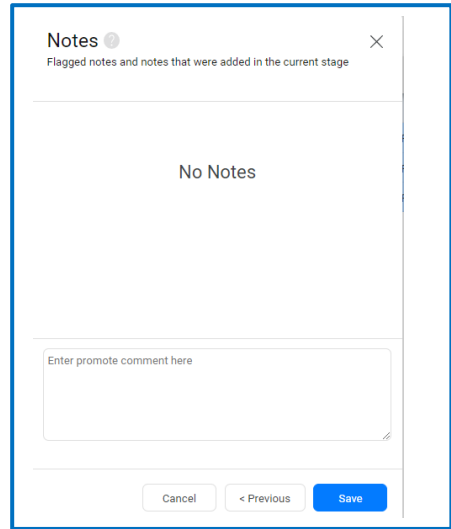
CHANGE REQUEST – BUDGET CHANGES (continued)

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

Next >

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

Save

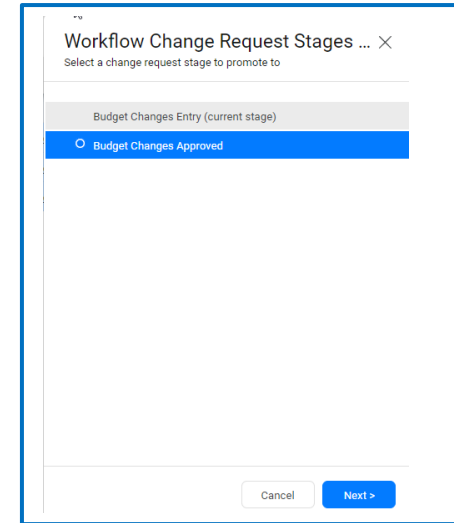


Notes ✕
Flagged notes and notes that were added in the current stage

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. ✕

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

Operating Budget **The Change Request is published.** ✕

Annual ▾ | 1 YR ▾ | 2024 ▾ | 0 ▾ | Value Bar | Filter | Layout | Import | Export

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...	

CHANGE REQUEST – BUDGET CHANGES (continued)

Budget Changes will be reflected on the Budget Template Reports under the Budget Changes Column 2023-24.
Note: To see changes click on the refresh icon.

**MT. SAN ANTONIO COLLEGE
2023-24 BUDGET TEMPLATE**

Fund Type: 11 - Unrestricted General Fund
Organization: 670000 - Event Services

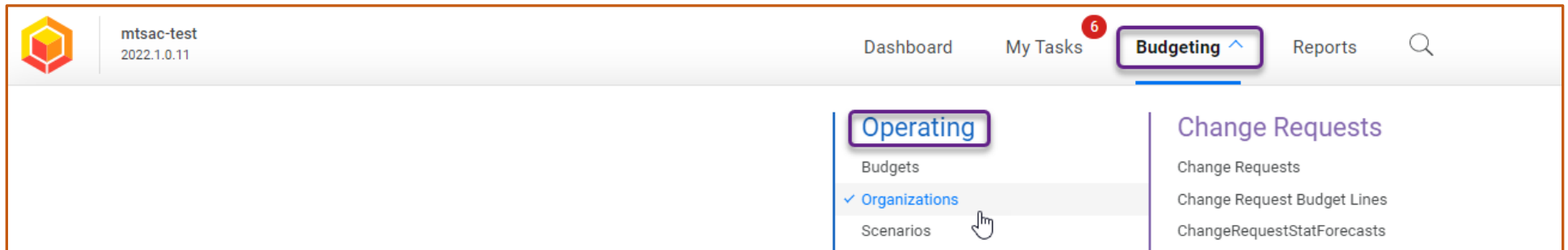
Fund	Org	Acct	Prog	Actv	Account Description	Organization Description	FTE	Range	Acct %	Salary	Adopted Budget 2022-23	Status Quo Budget 2023-24	Budget Changes 2023-24	Revised Status Quo Budget 2023-24
Expenses / Expenditure														
11000	670000	211000	683000	2100	Classified Salaries-Unit A	Event Services					381,180	493,161	0	493,161
					CA9290 Bunds, Maria		1.000	CA00069	40.24	25,761				
					CA9952 Catingub, Deborah		1.000	CA00088	20.00	17,430				
					CA9807 Garcia, Yvette		1.000	CA00088	100.00	78,589				
					CA9903 Mendoza, Elizabeth		1.000	CA00095	100.00	73,088				
					CA9543 Nichols, Jessica		1.000	CA00081	50.00	33,659				
					CA9233 Parks, Cynthia		1.000	CA00124	100.00	94,433				
					CA9972 Shultis, Stephanie		1.000	CA00088	50.00	39,294				
					CA9986 Walker, Paul		1.000	CA00137	10.00	11,607				
					CA9223 Event Services Technician		1.000	CA00075	100.00	59,650				
					CA9893 Event Services Technician		1.000	CA00075	100.00	59,650				
11000	670000	215000	683000	2100	Classified Admin Salaries	Event Services					128,364	136,492	0	136,492
					MC9934 Bowman, Brandin		1.000	AD00017	50.00	89,887				
					MC9992 Owen, Kevin		1.000	AD00021	20.00	46,605				
11000	670000	231000	683000	2100	Short-Term, Nonacad Salaries	Event Services					23,810	23,810	0	23,810
11000	670000	232000	683000	2100	Professional Expert Salaries	Event Services					34,669	34,669	0	34,669
11000	670000	236000	683000	2100	Overtime, Noninstructional	Event Services					20,000	20,000	0	20,000
11000	670000	321000	683000	2100	PERS Budget Holding	Event Services					128,587	159,565	0	159,565
11000	670000	331000	683000	2100	OASDI, Budget Holding	Event Services					31,466	39,038	0	39,038
11000	670000	335000	683000	2100	Medicare, Budget Holding	Event Services					7,361	9,131	0	9,131
11000	670000	341000	683000	2100	Health and Welfare Benefits	Event Services					107,733	129,103	0	129,103
11000	670000	351000	683000	2100	State Unemploy Budget Holding	Event Services					2,537	3,146	0	3,146
11000	670000	361000	683000	2100	W/C Budget Holding	Event Services					7,511	9,320	0	9,320
11000	670000	451000	683000		Supplies	Event Services					8,000	8,000	(1,000)	7,000
11000	670000	511000	683000		Consultants	Event Services					0	0	500	500
11000	670000	521000	683000		Travel and Conferences	Event Services					0	0	500	500
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

2023-24 BUDGET TEMPLATE Page 1

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 application's top navigation bar with the following elements:

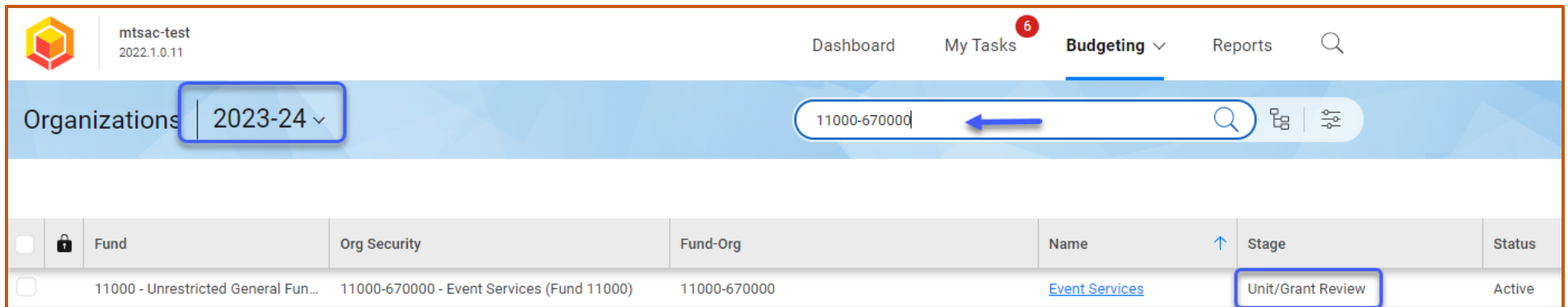
- Logo and user information: mtsac-test, 2022.1.0.11
- Navigation items: Dashboard, My Tasks (with a red notification badge '6'), **Budgeting** (highlighted with a purple box), Reports, and a search icon.
- Sub-menu for 'Operating' (highlighted with a purple box):
 - Budgets
 - Organizations** (highlighted with a blue checkmark and a mouse cursor)
 - Scenarios
- Sub-menu for 'Change Requests' (highlighted with a purple box):
 - Change Requests
 - Change Request Budget Lines
 - ChangeRequestStatForecasts

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 application's search results page with the following elements:

- Navigation bar: Dashboard, My Tasks (with a red notification badge '6'), **Budgeting** (with a dropdown arrow), Reports, and a search icon.
- Search bar: Contains '11000-670000' and a search icon. A blue arrow points to the search icon.
- Filter: 'Organizations' with a dropdown menu showing '2023-24'.
- Table of search results:

<input type="checkbox"/>		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

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 system interface. The top navigation bar includes 'Dashboard', 'My Tasks' (with a red notification badge '6'), 'Budgeting' (selected), and 'Reports'. A search bar is located above the table. The table displays the following data:

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

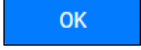
Promoting a Single Organization

- 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.

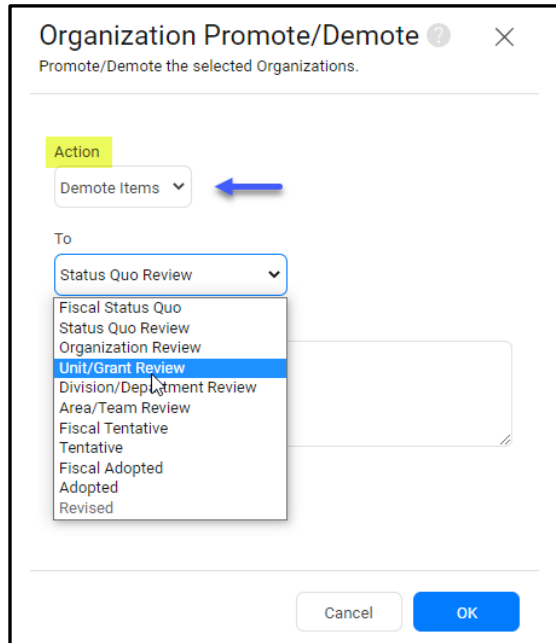
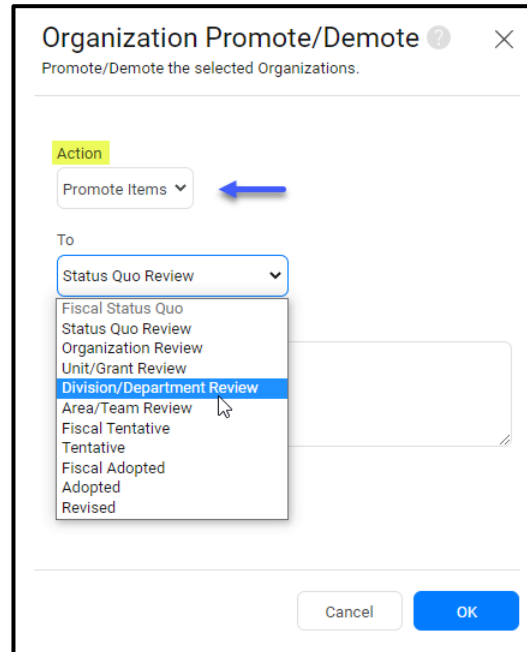
The screenshot shows the MTSAC system interface. At the top left, the logo and version information 'mtsac-test 2022.1.0.11' are displayed. The navigation menu includes 'Dashboard', 'My Tasks' (with a red notification badge '6'), 'Budgeting' (selected), and 'Reports'. A search icon is present in the top right. The main content area is titled 'Organizations | 2023-24'. Below this is a search bar with the text 'Search Organizations' and a search icon. A blue box highlights the search bar with the text: '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 with columns: Fund, Org Security, Fund-Org, Name, and Stage. The first row is selected, and a context menu is open over it, with 'Promote/Demote Organization' highlighted. The table data is as follows:

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

mtscac-test
2022.1.0.11

Dashboard My Tasks **Budgeting** Reports

Organizations | 2023-24

11000

<input checked="" type="checkbox"/>	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	Broadcast Services	Unit/Grant Review	Active
<input checked="" type="checkbox"/>	11000 - Unrestricted General Fund-Ongoing	11000-670000 - Event Services (Fund 11000)	11000-670000	Event Services		Active
<input checked="" type="checkbox"/>	11000 - Unrestricted General Fund-Ongoing	11000-671000 - Performing Arts Operations (Fund 11000)	11000-671000	Performing Arts Operations		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

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

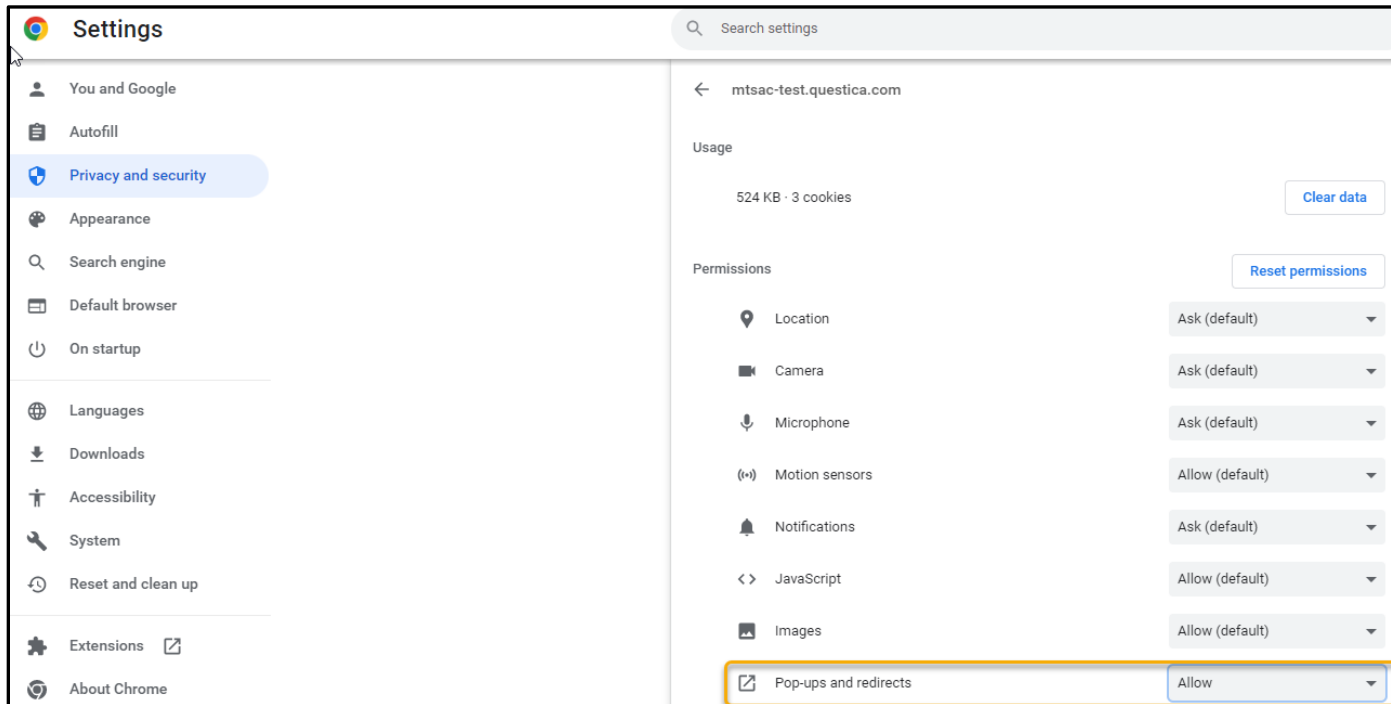
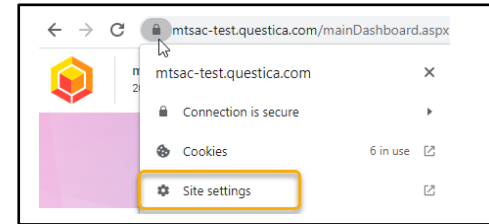
Cancel OK

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.

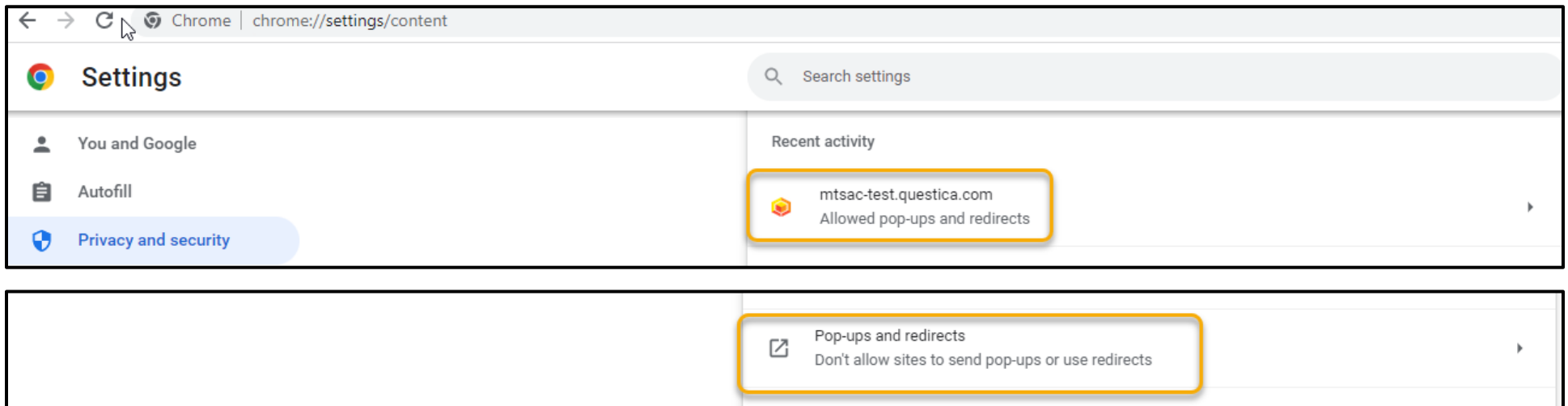


ALLOW POP-UPS IN CHROME FOR QUESTICA (continued)

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).