

Overview:

The following training guide covers the basics of utilizing Questica's global budget scenario functionality, including navigating between scenarios to create budget plans and comparing data between scenarios.

Global budget scenarios function similarly to the operation of budget years in Questica: they are discrete, global planning environments with accessibility to the planning features typically used including Forecasts, Positions, and Position Allocations. Due to their global application and processing time, scenario creation is limited to system administrators.

Questica provides a "Comparisons" tool allowing the user to compare data between two scenarios at various "tree" levels customizable by the user, along with two standard report options in the Report Center.

Planning In Different Scenarios:

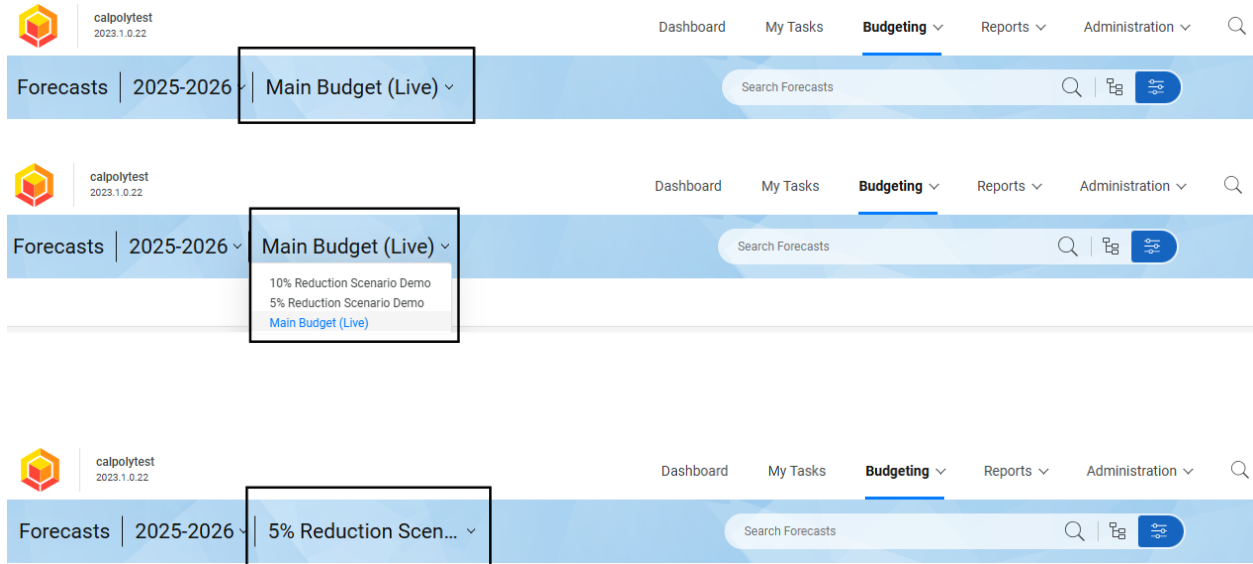
The mechanics of preparing budgets in multiple scenarios is virtually identical to planning in one scenario. For this reason, please refer to the separate user guides for budget entry and position planning for information specific to those topics. This section will focus on how to navigate between different scenarios within the different modules.

Just like with budget years, Questica utilizes a dropdown menu within each module to toggle between budget scenarios. The scenario with (Live) at the end of the scenario name signifies the main scenario linked to Questica reports and the integration we use to load budgets to PeopleSoft when final.

OE and Revenue Planning:

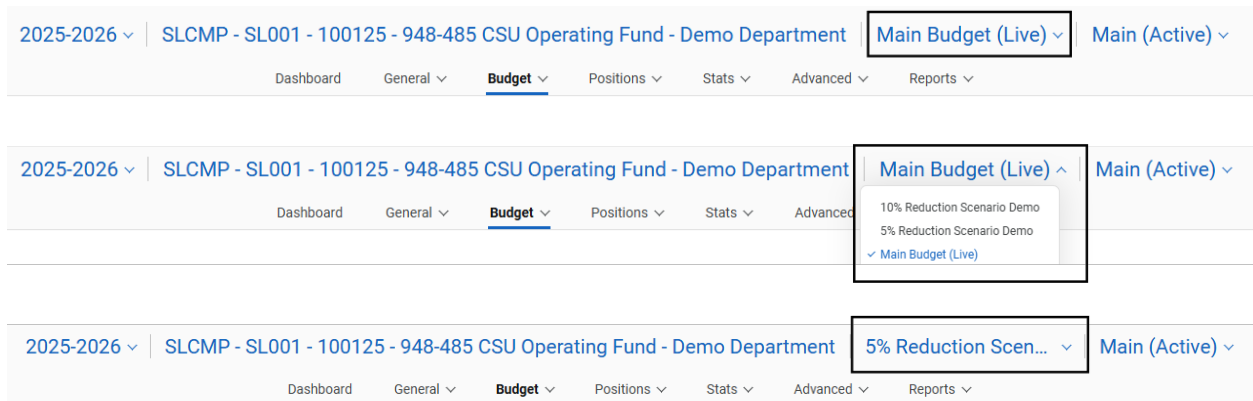
Operating Expense and Revenue planning is conducted within the forecasts grid, either broadly within Forecasts or individually within a Fund – Department.

When planning broadly within Forecasts (Budgeting > Budget > Forecasts) a dropdown menu will be available when multiple scenarios exist immediately to the right of the budget year dropdown. The text visible next to the budget year is the scenario the user is currently in. To change scenarios: left click on the scenario name to open the menu > left click on the desired scenario:



In the example above the user was in the Main Budget scenario and toggled to the 5% Budget Reduction scenario. Any changes made now within the forecast grid will only be applicable to the 5% Reduction scenario.

When planning within Fund – Department (Budgeting > Operating > Fund – Department) the functionality will be the same but the menu to select the scenario is in a different location. You first need to enter (select) a Fund – Department before you can move between scenarios. i.e. There is not an option to select the scenario within the Fund – Department selection menu. When in a Fund – Department the scenario information and dropdown menu is located immediately to the right of the Fund – Department name. Identifying what scenario, you are in and changing between scenarios remains the same as described above.

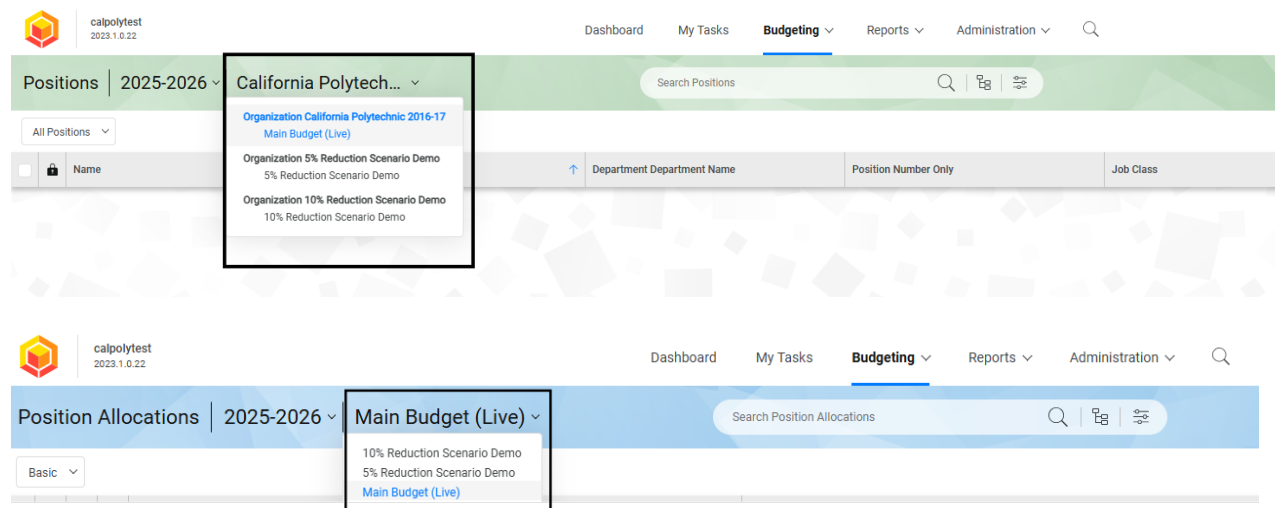


Note there is an additional dropdown menu to the right of the global budget scenarios. This is for user defined scenarios specific to individual Fund – Departments that have less functionality and are thus rarely used.

Personnel Planning:

Each budget scenario has its own Personnel organization with separate Position, Position Allocation, and Employee tables. The user can thus have different detailed personnel plans from scenario to scenario such as budgeting for a position in one scenario and not another or having a position's budgeted costs allocated to different ChartField string(s) between scenarios.

The functionality to maneuver between scenarios for planning is the same as described in the previous section. Just like in the Forecasts grid, the scenario identifier and menu are located immediately to the right of the budget year when in the Positions and Position Allocations grids:



Example

In the following example, the user initially planned a baseline budget scenario. A global budget scenario was then created as a copy from the baseline scenario for the organization to plan an alternate scenario in the event of a 10% funding reduction. The user planned both personnel and operating cost reductions to achieve potential budget

In the 10% funding reduction scenario, funding was cut by \$57,400 as seen with the negative revenue entry below.

Since the budget now has a deficit of \$57,400, the user has reduced several operating costs to once again maintain a balanced budget. Out of State Travel was one of these reductions and although the user could have zeroed out the \$9,000 in the 10% Reduction Scenario, they chose to add a negative entry to offset the Out of State Travel cost and leave themselves an audit trail.

PREFARE BASH BUDGET

2025-2026 | SLMCP - SL001 - 100125 - 948-485 CSU Operating Fund - Demo Department | Main Budget (Live) | Main (Active)

Dashboard General Budget Positions Stats Advanced Reports

Forecasts

Add Calculation Monthly Grid View 2025 Forecast Year Precision

GL Category	Account	Description	Program	Project	Class	Forecast	Ledger Group	Budget Scenario	Total	Jul
									(23,000.00)	
									(23,000.00)	
6.04.02 - Travel	605001 - Travel-In State	Conference ABC			Operating	OPER_BUDG	INI		12,000.00	
6.04.02 - Travel	605001 - Travel-In State	Conference XYZ			Operating	OPER_BUDG	INI		2,000.00	
6.04.02 - Travel	605002 - Travel-Out of State	3 conferences (\$3,000 each)			Operating	OPER_BUDG	INI		9,000.00	

REFRESH BASE BUDGET

2025-2026 | SLCLMP - SL001 - 100125 - 948-485 CSU Operating Fund - Demo Department | 10% Reduction Scenario | Main (Active)

Dashboard | General | **Budget** | Positions | Stats | Advanced | Reports

Forecasts

Select a cell to view its value

Monthly | Grid view

GL Category	Account	Description	Program	Project	Class	Forecast	Ledger Group	Budget Scenario	Total	Jul
GL Category: 6.04.02 - Travel									(14,000.00)	
Account Type: Expenses									(14,000.00)	
☐	6.04.02 - Travel	606501 - Travel in State	Conference ABC		Operating	OPER_BUDG	INI		12,000.00	
☐	6.04.02 - Travel	606501 - Travel in State	Conference XYZ		Operating	OPER_BUDG	INI		2,000.00	
☐	6.04.02 - Travel	606502 - Travel Out of State	3 conferences (\$3,000 each)		Operating	OPER_BUDG	INI		9,000.00	
☒	6.04.02 - Travel	606502 - Travel Out of State	Don't attend conferences out of state		Operating	OPER_BUDG	PERM		(1,000.00)	
GL Category: 6.04.03 - Contractual services									(36,000.00)	

The department also identified personnel costs that could be reduced in the event of a 10% funding reduction, by removing vacant position DEMO0004. To budget for this is in Questica, the user changed the position's FTE value to 0 in the 10% Reduction Scenario, which removed all costs from the position in that scenario.

Main Budget (Live):

The screenshot shows the 'Admin Support Coord 12 Mo (DEMO0004)' position form. The 'FTE Definition' is set to '2080' and the 'FTE' value is '1'. The 'Start Date' is '2024' and the 'End Date' is '2080'. The 'Year 1 Paid Hours' is '2080'.

10% Reduction Scenario:

The screenshot shows the 'Admin Support Coord 12 Mo (DEMO0004)' position form. The 'FTE Definition' is set to '2080' and the 'FTE' value is '0'. The 'Start Date' is '2024' and the 'End Date' is '2080'. The 'Year 1 Paid Hours' is '0'.

Main Budget (Live):

2025-2026 SLCMP - SL001 - 100125 - 948-485 CSU Operating Fund - Demo Department Main Budget (Live) Main (Active)											
Position Allocations											
Basic											
	Position Number Only	Fund Code	Dept Co..	Position	Amou..	Position Published ..	Position Publis..	Start Date	Program Code	Bud..	
☐	DEMO0003	SLCMP - SL001	100125	Admin Analyst/Societ 12 Mo (DEMO0003), Demo Employee (D111111111..	100	75,000	75,000		INI		
☐	DEMO0004	SLCMP - SL001	100125	Admin Support Coord 12 Mo (DEMO0004)	100	55,000	55,000		INI		
☐	DEMO0002	SLCMP - SL001	100125	Administrator I (DEMO0002), Demo Employee (D1111111114)	100	100,000	100,000		INI		
☐	DEMO0001	SLCMP - SL001	100125	Administrator II (DEMO0001), Demo Employee (D1111111113)	100	120,000	120,000		INI		
☐	DEMO0005	SLCMP - SL001	100125	Graphic Designer 12 Mo (DEMO0005), Demo Employee (D1111111112)	100	65,000	65,000		INI		
☐	DEMO0006	SLCMP - SL001	100125	Info Tech Consultant 12 Mo (DEMO0006)	100	63,000	63,000		INI		

10% Reduction Scenario:

2025-2026 | SLCMP - SL001 - 100125 - 948-485 CSU Operating Fund - Demo Department

10% Reduction Sce... | Main (Active)

Dashboard

General

Budget

Positions

Stats

Advanced

Reports

Position Allocations

Basic

		Position Number Only	Fund Code	Dept Co...	Position	Amou...	Position Published ...	Position Publis...	Start Date	Program Code	Bud...
Allocation Mode: Basic											
☐		DEMO0003	SLCMP - SL001	100125	Admin Analyst/Secrat 12 Mo (DEMO0003): Demo Employee (D111111111)	100	75,000	75,000		INI	
☐		DEMO0004	SLCMP - SL001	100125	Admin Support Coord 12 Mo (DEMO0004)	100				INI	
☐		DEMO0002	SLCMP - SL001	100125	Administrator I (DEMO0002): Demo Employee (D111111114)	100	100,000	100,000		INI	
☐		DEMO0001	SLCMP - SL001	100125	Administrator II (DEMO0001): Demo Employee (D111111113)	100	120,000	120,000		INI	
☐		DEMO0005	SLCMP - SL001	100125	Graphic Designer 12 Mo (DEMO0005): Demo Employee (D111111112)	100	65,000	65,000		INI	
☐		DEMO0006	SLCMP - SL001	100125	Info Tech Consultant 12 Mo (DEMO0006)	100	63,000	63,000		INI	

All changes culminated in a balanced budget in each scenario:

10% Reduction Scenario Demo vs. Main Budget (Live)

10% Reduction Scenario Demo vs 2025-2026 Budget: Main Budget (Live)

2025

Division > College/Area > Fund

Search

Filters

Division > College/Area > Fund

100125 - Demo Division

100125 - Demo College

SL001 - 948-485 CSU Operating Fund

120000 - Academic Affairs

120600 - Division of Research

120800 - Strategic Enrollment Mgmt

121300 - Office of University Diversity & Inclusion

125000 - Administration and Finance

130000 - University Personnel

137500 - University Development

140000 - Student Affairs

145000 - President

150000 - University Support

160000 - University Communications&Marketing

175000 - Centrally Managed

ELIMIN - Elimination

Summary

Forecasts

Actual Costs

Forecasts

SL001 - 948-485 CSU Operating Fund

\$0 vs \$0

\$0 / 0%

Annual

Grid View

Ph

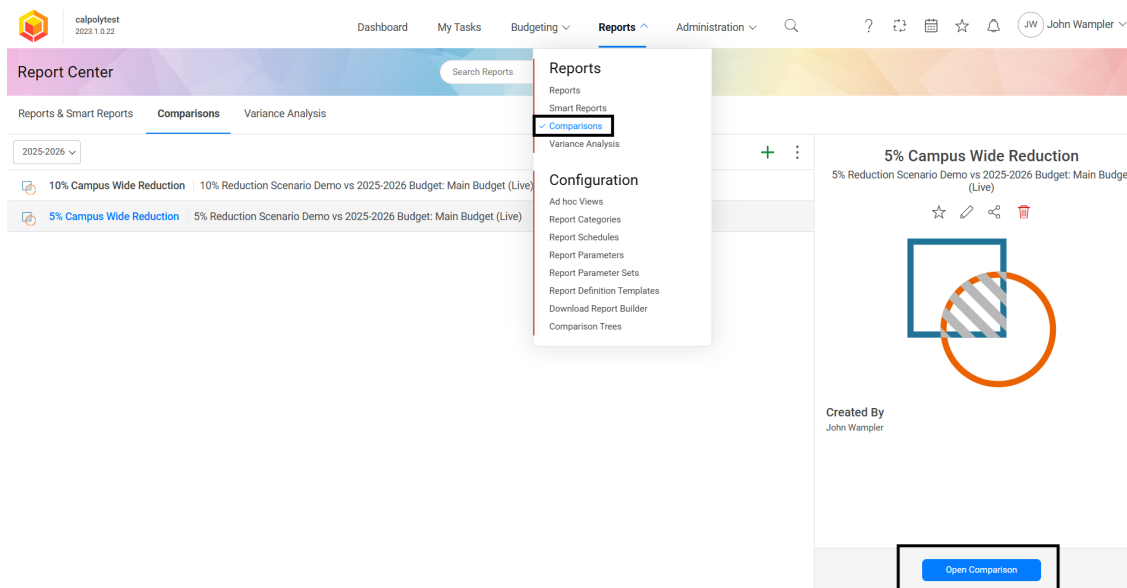
	Fund-Department	Account	2025	2025	2025 ± \$	2025 ± %
Account Type: Revenues / Funding Source			806,682.52	893,439.26	86,756.74	10.75%
GL Category: 5.10.01 - Base Funding Alloc			516,600.00	574,000.00	57,400.00	11.11%
GL Category: 5.10.02 - One Time Funding Alloc			290,082.52	319,439.26	29,356.74	10.12%
Account Type: Expenses / Expenditure			(806,682.52)	(893,439.26)	(86,756.74)	(10.75%)
GL Category: 6.01.02 - Management & Supervisory			(220,000.00)	(220,000.00)		
GL Category: 6.01.03 - Support Staff			(203,000.00)	(258,000.00)	(55,000.00)	(27.09%)
Account: 601300 - Support Staff Salaries			(203,000.00)	(258,000.00)	(55,000.00)	(27.09%)
SLCMP - SL001 - 100125 - 948-485 CSU Operating Fund - D...	601300 - Support Staff Salaries		(203,000.00)	(258,000.00)	(55,000.00)	(27.09%)
GL Category: 6.02.00 - Student Assistant			(32,000.00)	(24,000.00)	8,000.00	25.00%
GL Category: 6.03.00 - Benefits			(290,082.52)	(319,439.26)	(29,356.74)	(10.12%)
Account: 603090 - Benefits-Others			(640.00)	(480.00)	160.00	25.00%
SLCMP - SL001 - 100125 - 948-485 CSU Operating Fund - D...	603090 - Benefits-Others		(640.00)	(480.00)	160.00	25.00%
Account: 603014 - Long-Term Disability Insurance			(119.52)	(119.52)		
SLCMP - SL001 - 100125 - 948-485 CSU Operating Fund - D...	603014 - Long-Term Disability Insurance		(119.52)	(119.52)		
Account: 603013 - Vision Care			(424.95)	(509.94)	(84.99)	(20.00%)
SLCMP - SL001 - 100125 - 948-485 CSU Operating Fund - D...	603013 - Vision Care		(424.95)	(509.94)	(84.99)	(20.00%)
Account: 603012 - Medicare			(6,133.50)	(6,931.00)	(797.50)	(13.00%)
SLCMP - SL001 - 100125 - 948-485 CSU Operating Fund - D...	603012 - Medicare		(6,133.50)	(6,931.00)	(797.50)	(13.00%)
Account: 603011 - Life Insurance			(998.50)	(740.00)	258.50	25.90%
25 records			(0.00)	0.00	0.00	25.00%

Comparing Scenarios:

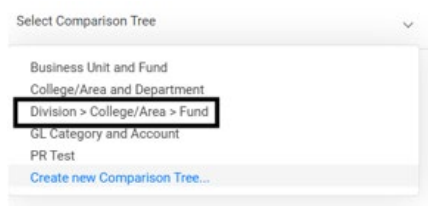
Questica offers a couple vehicles to compare data across two budget scenarios. The Comparisons tool is dynamic, allowing for different views customizable by the user and drill down capabilities. There are also two standard report options in the Report Center: “Comparison Report” and “Baseline Comparison with Multiple Grouping”.

Comparison Tool

To access the Comparison Tool, click “Reports” and then “Comparisons” from the Operating menu. Next, select the Comparison you would like to view and select “Open Comparison”



Once the comparison is open, a comparison tree will need to be selected to begin the comparison. Click the drop down next to the “Select Comparison Tree” text to choose a tree. Comparison trees determine the order in which data is sorted once you are viewing a comparison. We recommend the “Division > College/Area > Fund” tree but use the order that best suits your needs.



The Comparison tree by default opens at the highest level of the tree. The user will be able to navigate to different levels of the tree using the drop-down carrot next to each level of the tree. For example, if the highest level of the tree is division, with the next level being College/Area, the user will begin the display screen in division with the drop-down carrot giving them access to view the college/areas within the division selected. The initial levels of the tree show summary level data, such as net revenue and expenses or gross expenses. Account level details can be found at the lowest level of the tree, and the user is able to select the layout and grouping preferences they prefer to analyze the comparison. We recommend using the shared layout “GL Category > Account”.

Tree Structure:

5% Reduction Scenario Demo vs. Main Budget (Live)

■ 5% Reduction Scenario Demo vs ■ 2025-2026 Budget: Main Budget (Live)

Division > College/Area > Fund

Search Filters

SL001 - 948-485 CSU Operating Fund \$0 vs \$0

Summary ■ Forecasts ■ Actual Costs ■ Forecasts

Division > College/Area > Fund	Fund-Department	Account	2025	2025
100125 - Demo Division				
100125 - Demo College				
SL001 - 948-485 CSU Operating Fund				
120000 - Academic Affairs				
120600 - Division of Research				
120800 - Strategic Enrollment Mgmt				
121300 - Office of University Diversity & Inclusion				
125000 - Administration and Finance				
130000 - University Personnel				
137500 - University Development				
140000 - Student Affairs				
145000 - President				
150000 - University Support				
160000 - University Communications&Marketing				
175000 - Centrally Managed				
ELIMIN - Elimination				
Account Type: Revenues / Funding Source			864,499.26	893,439.26
GL Category: 5.10.01 - Base Funding Alloc			545,300.00	574,000.00
Account: 570906 - Base Funding Reduction (000)			(28,700.00)	
SLCMP - SL001 - 100125 - 948-485 CSU Operating Fund - D...	570906 - Base Funding Reduction (000)		(28,700.00)	
Account: 570901 - Initial Base Alloc (000)			574,000.00	574,000.00
SLCMP - SL001 - 100125 - 948-485 CSU Operating Fund - D...	570901 - Initial Base Alloc (000)		574,000.00	574,000.00
GL Category: 5.10.02 - One Time Funding Alloc			319,199.26	319,439.26
Account: 570961 - Benefits Funding (000)			319,199.26	319,439.26
SLCMP - SL001 - 100125 - 948-485 CSU Operating Fund - D...	570961 - Benefits Funding (000)		319,199.26	319,439.26
Account Type: Expenses / Expenditure			(864,499.26)	(893,439.26)
GL Category: 6.01.02 - Management & Supervisory			(220,000.00)	(220,000.00)
Account: 601201 - Management and Supervisory			(220,000.00)	(220,000.00)

Please note, your view will only show areas that you have access to.

Shared Layout options at the lowest level of the tree:

Grid Layout

GL Category > Account (prosemas@...)

System Default View

GL Category > Account (prosemas@calpoly.edu) (Default)

Save...

Save As...

Share...

Revert

Delete

GL Category

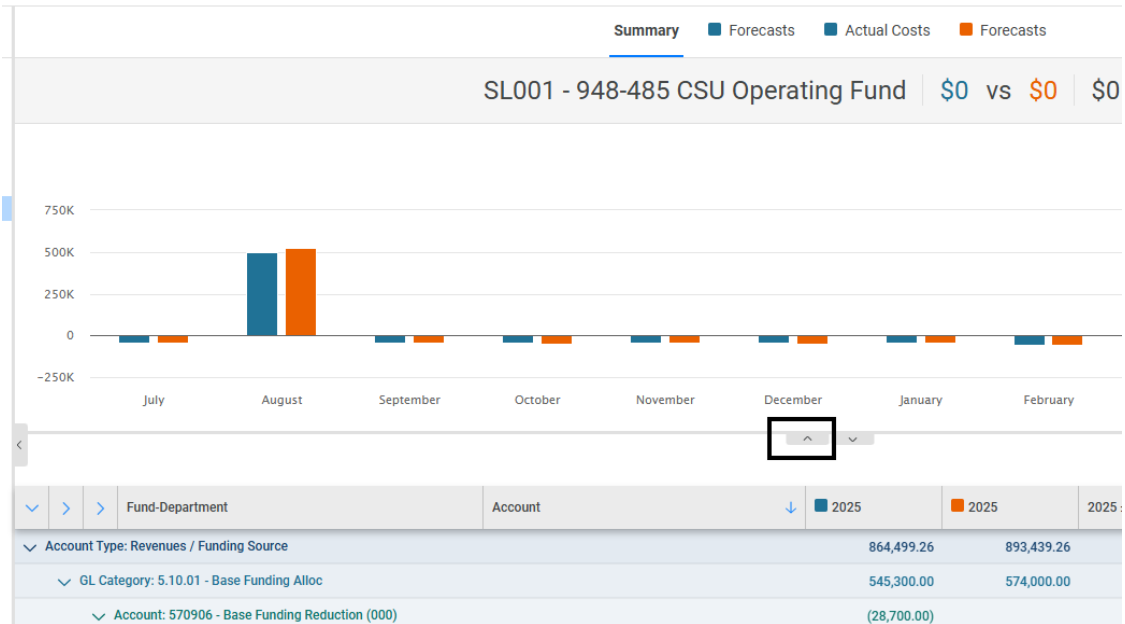
Account

Grid Options

2025	2025	2025 ± \$	2025 ± %
864,499.26	893,439.26	28,940.00	3.35%
545,300.00	574,000.00	28,700.00	5.26%
(28,700.00)		28,700.00	100.00%
(28,700.00)		28,700.00	100.00%
574,000.00	574,000.00		
574,000.00	574,000.00		

Once the data populates, a graph will appear along with the summary of the comparisons broken out within the columns. We recommend hiding the graphs by clicking the up carrot as seen below:

Before Graphs are Hidden:



After Graphs are Hidden:

5% Reduction Scenario Demo vs. Main Budget (Live)

5% Reduction Scenario Demo vs 2025-2026 Budget: Main Budget (Live)

2025

Division > College/Area > Fund

Search Filters

Division > College/Area > Fund

100125 - Demo Division

100125 - Demo College

SL001 - 948-485 CSU Operating Fund

Summary Forecasts Actual Costs Forecasts

SL001 - 948-485 CSU Operating Fund \$0 vs \$0 \$0 / 0%

Annual 0.00 Grid View Precise

Fund-Department	Account	2025	2025	2025 ± \$	2025 ± %
Account Type: Revenues / Funding Source		864,499.26	893,439.26	28,940.00	3.35%
GL Category: 5.10.01 - Base Funding Alloc		545,300.00	574,000.00	28,700.00	5.26%
Account: 570906 - Base Funding Reduction (000)		(28,700.00)		28,700.00	100.00%
SLCMP - SL001 - 100125 - 948-485 CSU Operating Fund - D...	570906 - Base Funding Reduction (000)	(28,700.00)		28,700.00	100.00%
Account: 570901 - Initial Base Alloc (000)		574,000.00	574,000.00		
SLCMP - SL001 - 100125 - 948-485 CSU Operating Fund - D...	570901 - Initial Base Alloc (000)	574,000.00	574,000.00		
GL Category: 5.10.02 - One Time Funding Alloc		319,199.26	319,439.26	240.00	0.08%
Account: 570961 - Benefits Funding (000)		319,199.26	319,439.26	240.00	0.08%
SLCMP - SL001 - 100125 - 948-485 CSU Operating Fund - D...	570961 - Benefits Funding (000)	319,199.26	319,439.26	240.00	0.08%
Account Type: Expenses / Expenditure		(864,499.26)	(893,439.26)	(28,940.00)	(3.35%)

When at the lowest level of the Comparison Tree, the three carrots located in the lefthand corner of the display screen (just right of the comparison tree) allow users to toggle between the group by filters selected in layout. The first carrot will roll up the data to the first group by option, the second carrot rolling up the data to the second group by option, the third carrot rolling up the data to the third group by option, etc. In the screenshot below, the user is using the shared layout grid mentioned above (GL Category > Account). Therefore, in this example clicking the first carrot will roll the data up to Account Type. If the second carrot were to be selected in this example, the data would be rolled up to GL Category and if the third carrot were to be selected, the data would be rolled up to Account level.

5% Reduction Scenario Demo vs. Main Budget (Live)

5% Reduction Scenario Demo vs 2025-2026 Budget: Main Budget (Live)

Division > College/Area > Fund

Search Filters

Division > College/Area > Fund

100125 - Demo Division

100125 - Demo College

SL001 - 948-485 CSU Operating Fund

125000 - Administration and Finance

Summary Forecasts Actual Costs Forecasts

SL001 - 948-485 CSU Operating Fund \$0 vs \$0 \$0 / 0%

Annual Grid View

	2025	2025	2025 ± \$	2025 ± %
Fund-Department				
Account				
Account Type: Revenues / Funding Source	864,499.26	893,439.26	28,940.00	3.35%
GL Category: 5.10.01 - Base Funding Alloc	545,300.00	574,000.00	28,700.00	5.26%
GL Category: 5.10.02 - One Time Funding Alloc	319,199.26	319,439.26	240.00	0.08%
Account Type: Expenses / Expenditure	(864,499.26)	(893,439.26)	(28,940.00)	(3.35%)

Columns

↓ Fund-Department X

↓ Account X

Group By

↓ Account Type X

↓ GL Category X

↓ Account X

Grid Options

As a note, the best way to button up this report would be to use the group by carrots (mentioned above). When each carrot is selected, the totals of the group by option will be displayed as seen below.

10% Reduction Scenario Demo vs. Main Budget (Live)

10% Reduction Scenario Demo vs 2025-2026 Budget: Main Budget (Live)

Division > College/Area > Fund

Search Filters

Division > College/Area > Fund

100125 - Demo Division

100125 - Demo College

SL001 - 948-485 CSU Operating Fund

120000 - Academic Affairs

120600 - Division of Research

120800 - Strategic Enrollment Mgmt

121300 - Office of University Diversity & Inclusion

125000 - Administration and Finance

130000 - University Personnel

137500 - University Development

140000 - Student Affairs

145000 - President

150000 - University Support

160000 - University Communications&Marketing

175000 - Centrality Managed

ELIMIN - Elimination

Summary Forecasts Actual Costs Forecasts

SL001 - 948-485 CSU Operating Fund \$0 vs \$0 \$0 / 0%

Annual Grid View 0.00 Precision

	2025	2025	2025 ± \$	2025 ± %
Fund-Department				
Account				
Account Type: Revenues / Funding Source	806,682.52	893,439.26	86,756.74	10.75%
GL Category: 5.10.01 - Base Funding Alloc	516,600.00	574,000.00	57,400.00	11.11%
GL Category: 5.10.02 - One Time Funding Alloc	290,082.52	319,439.26	29,356.74	10.12%
Account Type: Expenses / Expenditure	(806,682.52)	(893,439.26)	(86,756.74)	(10.75%)
GL Category: 6.01.02 - Management & Supervisory	(220,000.00)	(220,000.00)		
GL Category: 6.01.03 - Support Staff	(203,000.00)	(258,000.00)	(55,000.00)	(27.09%)
GL Category: 6.02.00 - Student Assistant	(32,000.00)	(24,000.00)	8,000.00	25.00%
GL Category: 6.03.00 - Benefits	(290,082.52)	(319,439.26)	(29,356.74)	(10.12%)
GL Category: 6.04.02 - Travel	(14,000.00)	(23,000.00)	(9,000.00)	(64.29%)
GL Category: 6.04.03 - Contractual services	(36,000.00)	(36,000.00)		
GL Category: 6.04.04 - Services from Other Fnds/Agenci	(970.00)	(970.00)		
GL Category: 6.04.05 - Supplies & Services	(3,350.00)	(3,350.00)		
GL Category: 6.04.06 - IT Hardware/Software/License/Main	(2,630.00)	(2,630.00)		
GL Category: 6.04.90 - Other Operating Expense	(4,650.00)	(6,050.00)	(1,400.00)	(30.11%)

25 records (0.00) 0.00 0.00 25.00%

In addition to the Comparison Tool, Questica offers two canned reports that allow users to analyze changes made between scenarios.

Comparison Report:

The Comparison Report allows users to compare two scenarios side-by-side with up to three levels of grouping. The report is arranged in four columns, the first two columns being the totals of the scenarios being compared and the last two columns being the difference between the two scenarios and the percentage difference. Up to three grouping categories can be selected, however, grouping isn't mandatory to run the report. The levels of grouping range from: Fund, Division, Department, GL Category and Account Type.

From the Operating Menu, access the Comparison Report by clicking "Reports" and then "Reports". Once the "Reports" page has been loaded, Search "Comparison Report" in the search bar. Click on the Comparison Report and "Run Report"

The screenshot displays the Questica software interface. At the top, the navigation bar includes 'Dashboard', 'My Tasks', 'Budgeting', 'Reports' (highlighted), and 'Administration'. A user profile for 'John Wampler' is visible on the right. Below the navigation bar, the 'Report Center' is shown with tabs for 'Reports & Smart Reports', 'Comparisons', and 'Variance Analysis'. The 'Reports & Smart Reports' tab is active, showing a list of reports. The 'Comparison Report' is highlighted with a red box. To the right of the report list, a dropdown menu is open under the 'Reports' header, showing options like 'Smart Reports', 'Comparisons', 'Variance Analysis', and 'Configuration'. The 'Comparison Report' is also highlighted in this menu. Below the report list, the 'Comparison Report' details are shown, including a description: 'Compare Forecasts of two sides of a Comparison with up to three levels of grouping.' At the bottom right, there is a 'Run Report' button with a dropdown arrow, which is highlighted with a red box.

After clicking “Run Report” you will be prompted to select the Parameters of the report.

Select the scenarios you’d like to compare in the “Comparison” drop down menu.

The screenshot shows a web form titled "Parameters" with a list of dropdown menus. The "Comparison" dropdown is open, showing three options: "<Select a Value>", "5% Campus Wide Reduction", and "10% Campus Wide Reduction". The "5% Campus Wide Reduction" option is highlighted in blue. Below the form is a "Run Report" button.

Parameter	Value
Auto-Fill	Custom...
Budget Year	Current Operating Budget
College/Area or Department	100125 - Demo College
Business Unit or Fund	All
Costing Center	1 selected
GL Category or Account	All
Comparison	<Select a Value>
Grouping 1	<Select a Value>
Grouping 2	5% Campus Wide Reduction
Grouping 3	10% Campus Wide Reduction

Standard Parameters

Run Report

Grouping options allow the user to group by Division, Fund, GL category, etc. Please note, up to three grouping categories can be selected (not mandatory) and will organize the data in order of the grouping to be selected, similar to rows in a pivot table.

The screenshot shows the same "Parameters" form, but with different selections. The "Comparison" dropdown is now set to "5% Campus Wide Reducti". The "Grouping 1" dropdown is set to "GL Category", "Grouping 2" is set to "GL Account", and "Grouping 3" is set to "No Grouping". The "Run Report" button is now blue.

Parameter	Value
Auto-Fill	Custom...
Budget Year	Current Operating Budget
College/Area or Department	100125 - Demo College
Business Unit or Fund	All
Costing Center	1 selected
GL Category or Account	All
Comparison	5% Campus Wide Reducti
Grouping 1	GL Category
Grouping 2	GL Account
Grouping 3	No Grouping

Standard Parameters

Run Report

After all parameters have been set, “Run Report”

Parameters

Auto-Fill: Custom...

Budget Year: Current Operating Budget

College/Area or Department: 100125 - Demo College

Business Unit or Fund: All

Costing Center: 1 selected

GL Category or Account: All

Comparison: 10% Campus Wide Reduct

Grouping 1: Fund

Grouping 2: GL Category

Grouping 3: No Grouping

Standard Parameters

Run Report

Comparison Report

Budget Year: 2025
College/Area or Department: 100125 - Demo College
Business Unit or Fund: All
Fund-Department: All
GL Category or Account: All
Comparison: 10% Campus Wide Reduction
Grouped By: Fund, GL Category

Fund, GL Category	Account	10% Reduction Scenario Demo	2025-2026 Budget: Main Budget (Live)	Difference	Percentage Difference
SL001 - 948-485 CSU Operating Fund		-	-	-	-
5.10.01 - Base Funding Alloc		516,600	574,000	57,400	11.11%
	570901 - Initial Base Alloc (000)	574,000	574,000	-	-
	570906 - Base Funding Reduction (000)	(57,400)	-	57,400	100.00%
Total 5.10.01 - Base Funding Alloc		516,600	574,000	57,400	11.11%
5.10.02 - One Time Funding Alloc		290,083	319,439	29,357	10.12%
	570961 - Benefits Funding (000)	290,083	319,439	29,357	10.12%
Total 5.10.02 - One Time Funding Alloc		290,083	319,439	29,357	10.12%
6.01.02 - Management & Supervisory		(220,000)	(220,000)	-	-
	601201 - Management and Supervisory	(220,000)	(220,000)	-	-
Total 6.01.02 - Management & Supervisory		(220,000)	(220,000)	-	-
6.01.03 - Support Staff		(203,000)	(258,000)	(55,000)	(27.09%)
	601300 - Support Staff Salaries	(203,000)	(258,000)	(55,000)	(27.09%)
Total 6.01.03 - Support Staff		(203,000)	(258,000)	(55,000)	(27.09%)
6.02.00 - Student Assistant		(32,000)	(24,000)	8,000	25.00%
	601303 - Student Assistant	(32,000)	(24,000)	8,000	25.00%
Total 6.02.00 - Student Assistant		(32,000)	(24,000)	8,000	25.00%

Baseline Comparison with Multiple Grouping:

The Baseline Comparison with Multiple Grouping Report functions like the Comparison Report, with a few exceptions. One advantage of this report is that it gives users an option to only view changes made between scenarios, rather than view all line items. If a user prefers to view all line items, they still may do so with this report. It's worth noting that the levels of grouping are limited in this report compared to the Comparison Report.

From the Operating Menu, access the Comparison Report by clicking “Reports” and then “Reports”.

Once the “Reports” page has been loaded, Search “Baseline Comparison with Multiple Grouping” in the search bar”:

calpolytest
2023.1.0.22

Dashboard My Tasks Budgeting **Reports** Administration

Report Center

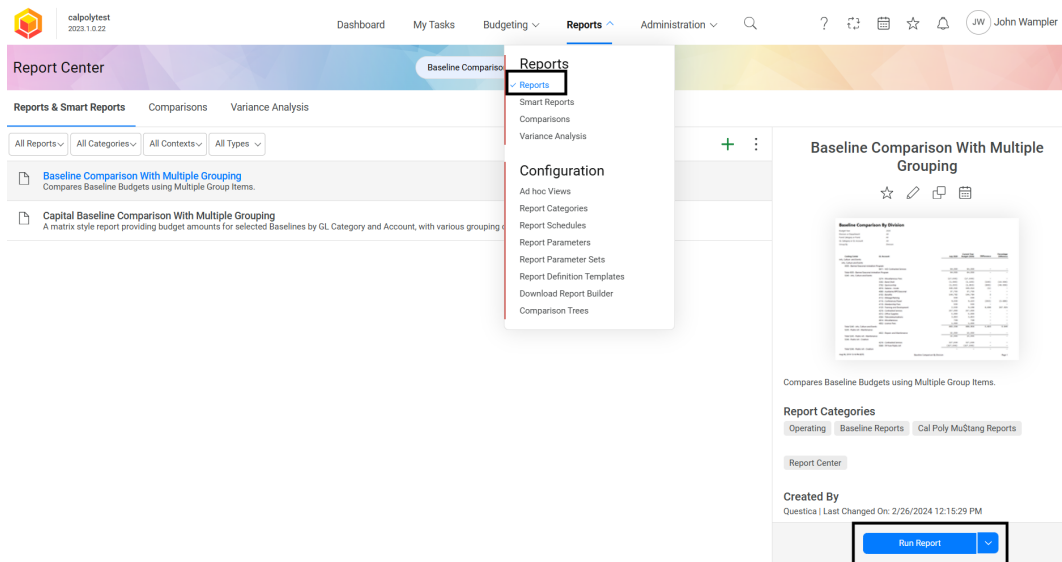
Baseline Comparison With Multiple Grouping

Reports & Smart Reports Comparisons Variance Analysis

All Reports All Categories All Contexts All Types

Baseline Comparison With Multiple Grouping
Compares Baseline Budgets using Multiple Group Items.

Click on the Baseline Comparison with Multiple Grouping Report and “Run Report”.



After clicking “Run Report” you will be prompted to select the Parameters of the report.

Please select “Current Operating Budget in Budget Year.

“Only Changed” will allow the user to select whether they would like to view all GL Categories/Accounts or only these categories that have changes between scenarios. If the user would only like to view changes between scenarios, select “Yes” in the drop-down menu.

Parameters	
Auto-Fill	Custom... ▼
Budget Year	Current Operating Budget ▼
College/Area or Department	All ▼
Business Unit or Fund	- SL001 - 948-485 CSU Op ▼
GL Category or Account	All ▼
Only Changed	Yes ▼
First Budget or Baseline	- Main Budget (Live) ▼
Second Budget or Baseline	- Test all fund-depts ▼
Group By	College/Area ▼
Expand To	Account ▼

First Budget or Baseline allows the user to select the first budget/scenario they'd like to use in the comparison.

Second Budget or Baseline allows the user to select the second budget/scenario they'd like to compare against the "First Budget or Baseline" selected above.

Parameters

Auto-Fill: Custom...

Budget Year: Current Operating Budget

College/Area or Department: 100125 - Demo College

Business Unit or Fund: SLCMP - Cal Poly San Luis

GL Category or Account: All

Only Changed: Yes

First Budget or Baseline: - Main Budget (Live)

Second Budget or Baseline: <Select a Value>

Group By: <Select a Value>

Expand To: - 10% Reduction Scenario Demo

Standard Parameters

- 5% Reduction Scenario Demo
- Test all fund-depts

Run Report

Click "Run Report" once all parameters have been selected.

Parameters

Auto-Fill: Custom...

Budget Year: Current Operating Budget

College/Area or Department: 100125 - Demo College

Business Unit or Fund: All

GL Category or Account: All

Only Changed: Yes

First Budget or Baseline: - 10% Reduction Scenario

Second Budget or Baseline: - Main Budget (Live)

Group By: College/Area

Expand To: Account

Standard Parameters

Run Report

Budget Comparison By College/Area

Budget Year: 2025
College/Area or Department: 100125 - Demo College
Business Unit or Fund: All
GL Category or Account: All
Group By: College/Area

Fund-Department	Account	10% Reduction Scenario Demo	Main Budget (Live)	Difference	Percentage Difference
100125 - Demo College					
100125 - Demo Department					
SLCMP - SL001 - 100125 - 948-485 CSU Operating Fund - Demo Department					
	601303 - Student Assistant	32,000	24,000	(8,000)	(25.00%)
	603001 - OASDI	26,226	29,636	3,410	13.00%
	603004 - Health and Welfare	118,419	143,601	25,182	21.26%
	603011 - Life Insurance	298	341	43	14.29%
	603012 - Medicare	6,134	6,931	798	13.00%
	603013 - Vision Care	425	510	85	20.00%
	603900 - Benefits-Others	640	480	(160)	(25.00%)
	606002 - Travel-Out of State	-	9,000	9,000	100.00%
	660009 - Professional Development	4,600	6,000	1,400	30.43%
	601300 - Support Staff Salaries	203,000	258,000	55,000	27.09%
	570961 - Benefits Funding (000)	(290,083)	(319,439)	(29,357)	(10.12%)
	570906 - Base Funding Reduction (000)	57,400	-	(57,400)	(100.00%)
Total SLCMP - SL001 - 100125 - 948-485 CSU Operating Fund - Demo Department		159,059	159,059	-	-
Total 100125 - Demo Department		159,059	159,059	-	-
Total 100125 - Demo College		159,059	159,059	-	-
Grand Total		159,059	159,059	-	-

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