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| **C:\Users\pmo6\Desktop\HSU\CircleH_green 150x150(300).jpg** |  | QUESTICA BUSINESS PROCESS GUIDE |

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| **DATE CREATED** | **PROCESS NAME** |
| September 3, 2019 | Questica Header Bar and Layout Functions |
| **PROCEDURE NO.** | **PROCESS OWNER** |
| 002 | Questica Campus Users |
| **DATE OF LAST UPDATE** | **LAST UPDATED BY** |
| September 23, 2019 | Patrick Orona |

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## INTRODUCTION

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| **PURPOSE** | To acquaint users with basic interfaces and tools when working in Questica Budgeting software. |
| **SCOPE** | Scope of this document pertains to Humboldt State University’s version of Questica Budgeting software. Topics include right click functionality on the header bar (column bar), saving screen views, and truncated grids. |
| **DOCUMENT MANAGEMENT** | University Budget Office (UBO) retains all copies of Business Process Guides (BPG) and handles distribution. |

## PROCESS

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| **OVERVIEW** | Basic interfaces  Screenshots provided for this business process guide (BPG) are from the Operating Module in the Fund-Department and Budgets screen view. However, right click functionality is consistent across all Questica Modules. |
| **STEP** | **ACTIVITY** |
| To view all Fund – Departments for your respective MBU(s), click the **Operating** menu in the left hand column.  Then select **Fund - Department** from the Operating module menu. |  |
| Changing Columns and Views | |
| Fund-Department Default Screen View |  |
| By right clicking on the top header bar, the menu populates.  Choose **Selected Columns** to change column views. |  |
| Prompt box titled **Grid Options** opens, allowing the user to add, remove and reorder columns.  Starred items are those required by Questica when creating an entry. |  |
| Using **Grid Options** create user display preference. |  |
| Select **OK** and changes to view are applied. |  |

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| Changing Grouping Function | |
| If wanting to group by any column on the screen, right click on the blue header bar on the selected column. Choose **Group By** to group items together. |  |
| Now you can see the fund-departments grouped by Departments. |  |
| This **Group By** function works for all columns.  Another example of group by Fund is provided to the right. |  |
| Reorganizing Columns | |
| Users can also reorder the columns to a view that fits their preference.  This can be done two ways; by dragging and dropping or using the grid layout function. |  |
| Click and hold the column tile that you would like to move, drag to the area you’d like the column to go. Example to the right shows Department and Fund columns reordered. |  |
| Users can also reorder the column view in the **Selected Columns** dialogue box when right clicking. |  |
| The **Grid Options** dialogue box shows available columns for view in this module and columns currently viewing. |  |
| To move the column order in this dialogue box, select the **Column Header** that you want to move, and drag column to the order that is preferred. |  |
| This move will automatically move the rest of the columns within the current view to accommodate the view.  Select **OK** highlighted in red when ready to see the new view. |  |
| This has now updated your view to the column order as displayed in the previous screen. |  |
| Saving Screen Views | |
| Once a view is set up the user can save the current view in Questica as a **Layout.**  To save a layout, click on **Layout** highlighted in orange. |  |
| In the drop down menu for **Layout**, select **Save As** to save view. |  |
| Name the saved layout view and select **Save.** |  |
| This layout is now saved in this module screen and can be accessed in the future. |  |
| Fit Columns to Screen / Allow Column Scrolling | |
| To view all selected columns on the screen right click on the header bar and select **Fit Columns to Screen** |  |
| All columns will resize to fit onto screen and scroll bar at the bottom of the screen will be removed. |  |
| To enable scrolling right click the header bar and select **Allow Column Scrolling.** |  |
| To resize columns place your cursor in-between columns and click and drag for desired width. A scrolling bar will appear for any columns extended beyond the screen. |  |
| Freeze / Unfreeze Columns | |
| To freeze columns while scrolling right click on desired column on the header bar and select **Freeze Columns**. Frozen columns will turn dark blue. |  |
| To unfreeze right click on hearer bar and select **Unfreeze Columns**. |  |
| Sort Columns | |
| To sort ascending (A to Z) click once on desired column. |  |
| To sort descending (Z to A) click twice on desired column. |  |
| To remove all sorting click three times or until arrow to the left has disappeared |  |
| Filter Bar | |
| To filter by columns right click on the header bar and select **Filter Bar.** |  |
| A bar below the header will appear. Start typing values in desired column(s) to filter rows |  |
| Users may filter on multiple columns |  |
| Truncated to 3,000 records | |
| All grids are limited or **Truncated to 3,000 records.**  Look to the bottom right of the screen to see if the grid is truncated. |  |
| If the grid is truncated filters and simple searches will only return records within the first 3,000.  To search all records within a module use the **Advanced Search** option. See *Budget Lines Grid* *BPG #003* for detail on how to set up advanced searches. | Note: **All** records, even if the grid is truncated, will be **included** in an excel export. |

## CHANGE HISTORY

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| **Section** | **DATE** | **DESCRIPTION OF CHANGE IMPLEMENTED** | **COMPLETED BY** |
| Truncated to 3,000 records | 9/23/2019 | Added truncated to 3,000 records section | 9/23/2019 |