

With any new system, many questions often arise. This document intends to summarize those frequently asked questions. The questions with responses are grouped by category.

GENERAL

1. What is Questica?

Questica is a web-based system designed for budget information. It contains selected information from CFS. It allows you to run reports regarding your expense projections, fund balances, fund summaries, and more.

2. Does Questica reports look the same as the Finance Data Warehouse?

Questica reports look more like a financial report as opposed to a report with financial information. Text appearing in red and negatives means bad, as they do in most Accounting systems. In the future, Questica will allow you to request changes for operating and position budgets.

3. Which system should I use for financial reporting?

You can use either the Finance Data Warehouse or the Questica Budget System for financial reporting. However, the financial reports in Questica are easier to read and understand.

4. Which system has the most current information?

The Common Finance System (CFS) is our primary financial system. It is the system where our financial data is entered and stored. It is the system of record for all financial data. Therefore, it will have the most current information.

5. Is the Finance Data Warehouse going away?

No, there is no plan to decommission the Finance Data Warehouse. You can continue to use it.

6. What other campuses use Questica?

Questica is currently used at 4 CSU campuses. CSU Northridge, San Luis Obispo, CSU Humboldt, and CSU Bakersfield. Plans are in progress to add more campuses in the future.

QUESTICA

1. Can I save reports?

Yes, you can save reports. There are different ways in which to save your report. You can save the parameters you used to run the report. You can also export your report as an Excel spreadsheet, PDF, or other formats. Please refer to the Working with Report Parameters or the Downloading and Printing Reports job aids.

2. How do you print a report?

To print a report, you will export it to PDF and then print the PDF. For more information, please refer to the Downloading and Printing Reports job aid.

3. Can I bookmark reports that I run frequently?

Reports that you run frequently can be bookmarked. You can find your bookmarked reports in the Bookmarks section of the Navigation pane.

Additionally, you can run your bookmarked reports using your saved Report Parameter Sets. For more information, please refer to the job aids Bookmarking Reports and Working with Report Parameters.

4. Can I save my report configuration?

Yes, you can. Questica refers to your report configuration as your Report Parameter Set. To learn more, see the job aid Working with Report Parameters.

5. Can I create my own reports?

At this time, you cannot create your own reports. However, you may use any of the financial reports in the system.

6. Can I use the report selections from one report on another report?

No, you cannot use report selections from another report. However, you can save your report selections to use with the same report.

7. How do you access Questica?

- Navigate to csub.questica.com
- On the Sign In page, enter your Net ID and password
- Click Login

FINANCIAL REPORTS

1. What type are reports are available in Questica?

The Questica Budget System has custom reports

designed specifically for the CSU. The 28 reports fall into 3 categories: Expense Projection, Fund Balance, and Fund Summary

2. What are the Expense Projection reports?

The Expense Projection reports show your expenses and projected expenses for a specific fiscal year. These reports can be run at 6 levels: Campus, Business Unit, Fund, Division, College / Area, Department, and Department Program Project Class.

3. How do I find out my fund Balances?

The Fund Balance reports show your fund balances including total revenues, total expenses, and transfers in/out for a specific fiscal year. These reports can be run for at levels for campus, business unit, fund, division, college area (school) / area, and department.

4. What are the Fund Summary Reports?

The Fund Summary reports provide a summary of your revenues, expenses, and transfers including beginning and ending balances for a specific fiscal year. These reports can be run at 5 levels: Campus, Business Unit, Fund, Division, College / Area, and Department.

5. How do I find the financial reports

- From the Navigation pane, click Analytics
- The reports will appear in the center pane.

6. How do I run a financial report?

- From the Analytics Center,
- Click the desired report
- Click Run Report
- For the Parameter Set, use the down arrows to make your selections
- Click Run Report

7. How can I see more detail?

You can drill down on any text appearing in blue. By clicking on the blue text, you can drill down to another report. To return to the previous report, click the blue arrow.

8. Can I edit a saved Report Parameter Set?

Yes, you can edit your saved Report Parameter Sets. You can find all your saved Report Parameter Sets under Report Tools in the Analytics Center. For more

information, see the job aid, Working with Report Parameters.

9. How do I use a saved Report Parameter Set?

You can use your saved Report Parameter Sets with the Auto-Fill, Bookmarks, and from the Analytics Center. For more information, see the job aid, Working with Report Parameters.

10. Where can I find more information about Questica and the CSU Custom reports?

If you need assistance, please refer to the resources below:

Campus Training website

www.csub.edu/training/pgms/qcustrepts/index.html

Contacts

- Level One Support

School / Division Budget Analyst

- Level Two Support

Paula Miser
Academic Liaison

Crystal Rios
Non-academic Liaison

- Level Three Support

Michelle Mills
University Budget Officer

Campus Training



Dr. Tammara Sherman
Campus Technology Trainer

(661) 654-6919

tsherman@csb.edu

www.csub.edu/training/

