



Overall Aim:

This session aims to inform about basic Questica report operations and to teach you how to run the financial reports in Questica.

Intended Audience

Budget Analysts

Duration

Approximately 120 minutes

Format

Direct instruction, guided practice, and independent practice

Lesson Objectives

At the end of the session, the participants will be able to:

- Articulate the function and purpose of the 3 types of financial reports
- Access Questica and navigate to the financial reports
- Run and read the Expense Projection, Fund Balance, and Financial Summary reports
- Expand sections to view detail
- Search within reports
- Save parameter sets
- Drill down and up to other reports
- Distinguish between different export options
- Download and print reports
- Identify the connection between Questica, CFS, and FDW
- Use Autofill
- Schedule reports

- Use Report Tools to manage parameters and schedules

Guiding Questions

- How can I get a balance for a fund?
- How can I get a financial summary for a fund?
- How can I get an expense projection for a fund?
- How can I get detail about the information in my reports?

