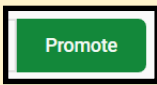


Questica OE Budget Transfer

Summary guide of how to submit an Operating Expense (OE) Budget Transfer through Questica.

Please visit [Budget Planning & Analysis website](#) for additional training materials.

Links: [Request Tableau Access](#) [Request Questica Access](#) [Inactive Account Codes](#) [Inactive Dept IDs](#)
[Salary & Wage Account Codes](#)

	Navigation	Instructions
1. Prepare Backup Documentation	Tableau – Custom View Current Fiscal Year Account Type: Expenditure Fund / Dept ID / Program / Class / Account	Tableau Custom View to show sufficient funds Screenshot with highlighted Dept ID & Account. Optional—Email threads, etc.
2. Create New Transfer Record in Questica	Budgeting > Change Requests > Change Requests Change Request Home Page > 	<u>Department</u> : Requestor's Home Dept ID <u>Fund</u> : Fund used in Transfer <u>Change Request Type</u> : Budget Transfer <u>Journal Line Ref</u> : Auto populated <u>Journal Line (Title)</u> : BT - Period - Division - Descr <u>Brief Description</u> : Purpose of Transfer
3. Save Transfer Backup Documentation in Change Request	Top Left > Paperclip Icon  OR Drag and Drop 	Save prepared backup documentation from Tableau Custom View.
4. Enter Transfer in Questica	Operating > Change Request Budget Lines  > Campus User System default View	 Add individual budget lines. OR  Export to User's Download Folder Edit excel; Insert Rows above Row 4 Data Validation > Circle Invalid Data  Import File Review Import Spreadsheet & Press OK
5. Make Change Request a Favorite	 2025 - 2026	Select Star Icon to file as Favorite. This allows you to easily retrieve the request when checking status or addressing Demotion.
6. Promote Budget Transfer		Select Promote Button Select Option 2 & Next Select Save

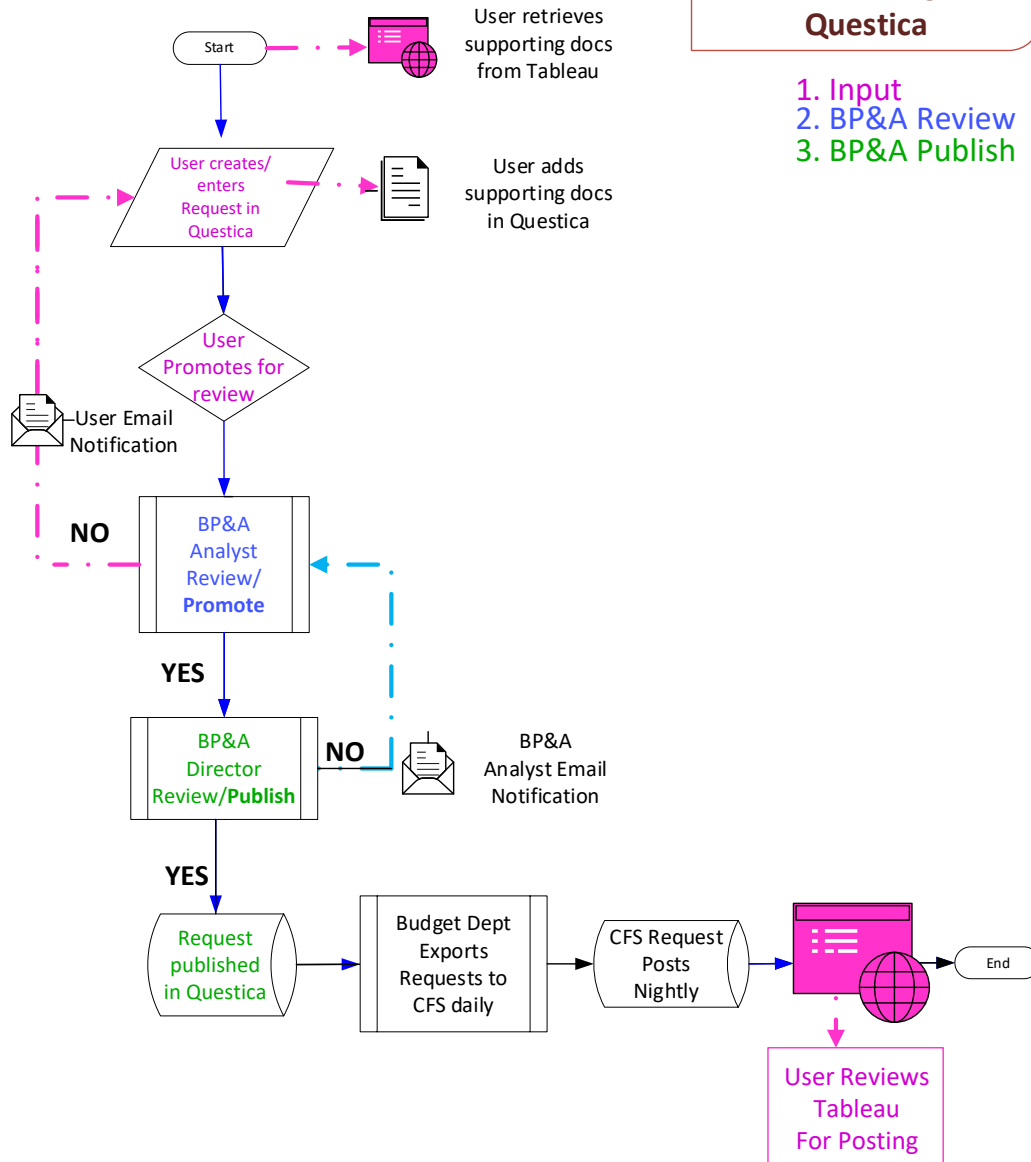
Requirements

- Provide purpose of transfer in the "Brief Description"
- Journal Line Title (Naming Convention):
BT - Accounting Period - Division - Description of Transfer
- Upload Tableau back-up documentation in Change Request
Change Request > General > Documents
- Amounts are rounded to nearest dollar
- Transfer nets to Zero: By Fund; By Scenario; By Designation
Cross transfers are NOT allowed
- Use appropriate chartfield values:
 - No transfers between Revenue Accounts
 - Salary Account Codes are Prohibited
[List of Salary & Wage Account Codes](#)
 - Do not use Inactive Department IDs & Account Codes
[List of Inactive Dept IDs](#)
[List of Inactive Account Codes](#)

Questica Budget Transfer Request Process

Workflow Stages in Questica

1. Input
2. BP&A Review
3. BP&A Publish



Budget Analysts: Divisions & Colleges

Amy Cher

- Student Affairs
- Information Technology
- President's Office & PCIA
- Academic Affairs
 - Academic Programs
 - Student Success
 - Academic Innovation
 - AVP Research
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 - Colleges: CoB, AG, CEIS, ENV, ENG, & CLASS

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