Training Guide for:
Historical Transfer Report

Who should use this guide:
Departmental and/or College financial planners involved in the planning and review of transfers within or outside their College/Division.

Purpose:
The report summarizes year-to-date transfers for past three years and current year through period 06. Transfers within the same planning funds & organization have been eliminated. Transfers between planning funds in the same organization will display

Locating the report:
Arizona.axiom.cloud

Revised: October 2022
Navigating the report:

Use the filter icon to retrieve information by Budget Year, Level, and Planning Fund

- **Budget Year** - next year will be the only option
- **Level** - Select College/Division or Organization. Search your unit by entering a keyword or number. Select one or multiple Organizations or College/Division.
- **Fund** - Required filter. Selection limited to one planning fund.

Report selections will be displayed at the top of the report. The report also offers the 'Export to Excel' function, located on the top-right corner.
Understanding your data:

Total Transfers Revenue & Expenses

The report summarizes total transfers revenue & expenses from the Operating Budget Module by Budget Object, Organization, and Planning Fund. The details of the transfers are listed by KFS Account/Sub Account, KFS Object Code/Sub Object Code, and KFS Project. Transfers within the same planning funds & organization have been eliminated. Transfers between planning funds & organization will display.

The transfers data in the report will tie back to the Operating Budget Module > Budget Tab by Planning Fund. If you select multiple organizations or a college as the report filter, then you can
tie the data back to the Operating Budget & Trend Analysis Report as another point of reference.

For additional questions, please contact your assigned Budget Analyst.