Quantum Bytes — an update on all things Quantum

UNIVERSITY of MARYLAND BALTIMORE

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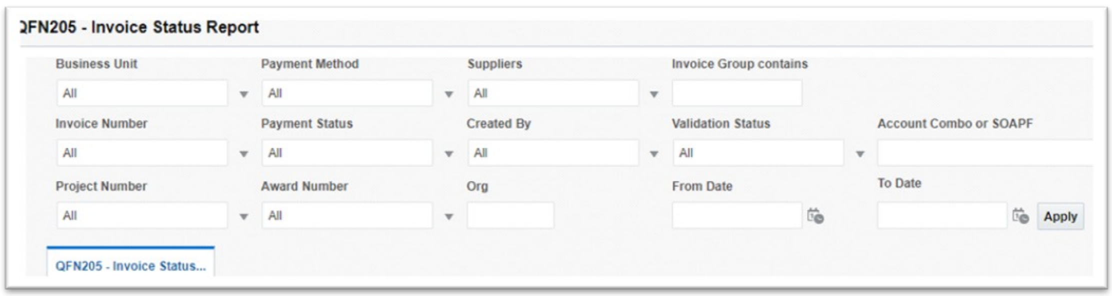
Inside this issue:

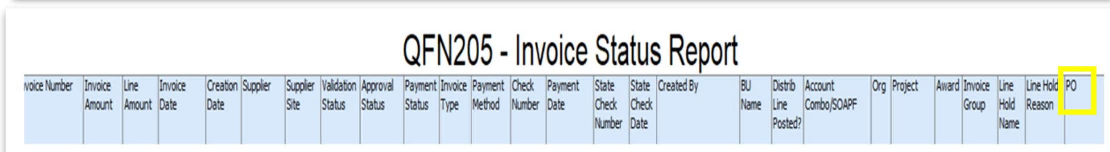
Find prior issues of Quantum Bytes here

Quantum Financials Notes

Quantum Financials Reports

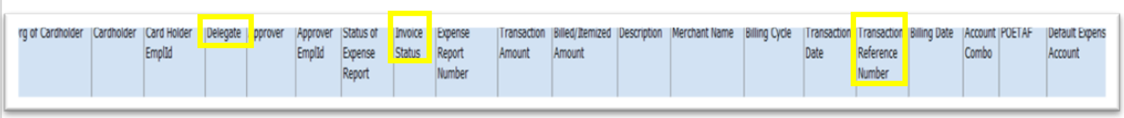
The Invoice Status Report (QFN205), accessed via the Reports Icon on the Quantum Financials home page, will allow end users to verify the approval and validation statuses for invoices and payments made to Suppliers. While parts of this information are available in various places such as Quantum Analytics - R50 Report and the Transaction Details Union Report, the Invoice Status Report will now pull it all together in Quantum Financials with options for selection parameters shown below. There are recent updates to this report including a correction that has fixed the inconsistency of report results when using broad search criteria, and a new column has been added to the returned results report with PO information. A UPK tutorial was created to help users walk through one of the ways this report can be used.



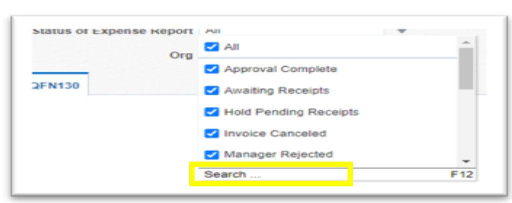


PCard Transaction Report (QFN130) with New Enhancements

New enhancements are coming soon to the PCard Transaction Report (QFN130) which is located under the Reports Icon on the Quantum Financials Home page and is used to retrieve PCard Expense Report related data. The enhancements include three additional columns: Delegate, Invoice Status, and Transaction Reference Number which ties to the Bank Statement.



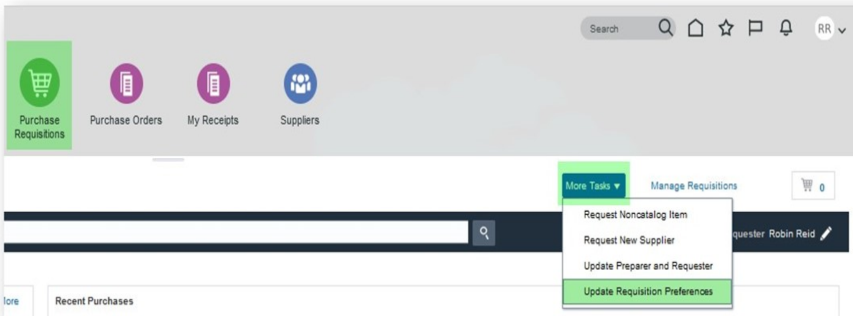
The options under the **Status of Expense Report** prompt have also been expanded with a search feature to reflect all possible expense report statuses, including those that UMB is currently not using.

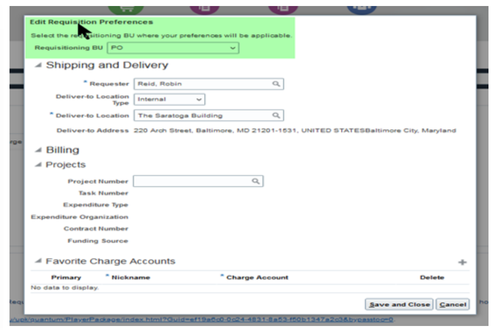


Definitions of each status are available on the Quantum website. If you find one of your expense reports in a status that is not used, submit a request to help@umaryland.edu so the Quantum support team can investigate. The PCard Transaction Report can be used by cardholders, authorized reviewers, reallocation delegates, and department administrators to manage PCard responsibilities. A best practice suggestion is to run the report at least monthly.

Creating and Approving Requisitions – Changing the User Preferences Default BU to PO

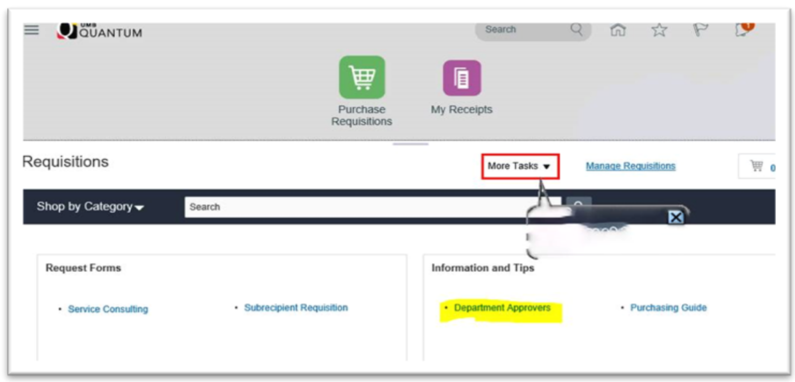
When you are first assigned the Procurement Preparer or Procurement Requester role, you will need to change your User Preferences to create anything other than a Temporary Requisition. The Requisitioning business unit (BU) defaults to UMB, which is only used to create Temporary Requisitions. For all other types of Requisitions including Catalog, Non-Catalog, Change Orders, Subrecipient, and Service Consulting, the BU must be changed to PO. To change the default BU, select More Tasks and Update Requisition Preferences from the Requisitions page. The Edit Requisition Preferences page appears, where users can change their default settings. For additional training information on understanding, creating, and approving Requisitions, please register for an upcoming session of Creating and Approving Requisitions, located on the Quantum Financials Calendar.





Requisitions Landing Page – Removing the Department Approvers Hyperlink

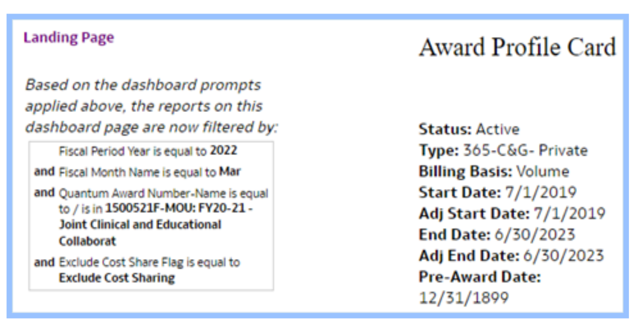
A hyperlink for "Department Approvers" has been available under Information and Tips on the Quantum Financials Requisitions landing page. Clicking the link returns a static document listing those employees with workflow (WF) approval roles. However, since that report was created "at a point in time" and does not provide an up-to-date list or any search prompts, the hyperlink has been removed. Instead, users can find the current approvers for any workflow role using the User Security Roles Report (QFN071) located under the Reports Icon on the Quantum Financials home page.



Quantum Analytics Notes

PI Profile Report Drill through to Award Detail

When drilling down to Award Detail from the PI Profile Report, users will no longer be able to access and change the Award, Fiscal Year and Fiscal Period prompts normally found on the Award Detail page. The prompts were hidden to keep users from trying to change them and to maintain financial reporting accuracy when drilling down from one report to another. If you drill from PI Profile you should only evaluate Award Details presented for the Award information from which you drilled. To evaluate a different Award or period, use the Award Detail page directly.



New Quantum Analytics WebEx Seminars and Workshops

Quantum Analytics Coaching Sessions

This workshop offers 45-minute timeslots for individual or small group Quantum Analytics users to receive coaching and instruction on reports of their choosing. Using WebEx, users will share specific reports they would like assistance with, and/or to discover new reports they have not yet tried. The focus will be on topic(s) that users bring to the session. To schedule a time slot, please contact Buzz Merrick at bmerrick@umaryland.edu.

Quantum Analytics Case Studies Workshop –Sponsored Reporting

Sponsored Dashboard reporting makes up the majority of reports Analytics users run. This workshop will focus on Sponsored (Awards & Projects) reporting: best practices for the reports you run most often (like Award Detail and PI Profile) and easy to learn and use techniques to make data analysis more efficient (and even fun!). We'll discuss how you can leverage the power and versatility of the Search report, as well as how to report on Grant dollars in the Budget to Actuals reports. Whether your needs are PI, Departmental, or school based, Analytics reporting is flexible and efficient, giving you more time to be a data analyst – not data gatherer!!! The User Aid(s) and PowerPoint presentation will be sent out in advance of the workshop. It will be held once in March and twice in April.

Remember

Clear Cache

This is especially important after quarterly upgrades and patches so that you can access the most up-to-date version of Quantum. The best practice suggestion is to clear your browser cache every day as part of signing into Quantum. Instructions can be found here.

Quantum Help Desk

The Quantum support team asks that you please keep sending your Quantum requests for help to help@umaryland.edu *and not to individual support team members or the Quantum Financials email box, which is not regularly monitored for such requests.* The helpdesk system is designed to document, track, and triage any requests for assistance.

Important Reminders

Important Fiscal Year-End Deadlines

The FY22 Year-End Deadlines announcement has been posted to the Financials Services website. Please circulate the announcement to all personnel involved in the fiscal and business operations in your department. Heading into the end of Fiscal Year 2022(FY22), your cooperation is requested to ensure transactions are properly recorded in the correct accounting period. Adherence to the prescribed procedures is important. The fiscal year ends on Thursday, June 30, 2022, and the final balances will be viewable in Quantum Analytics no later than Friday, July 29, 2022.

Financial Systems is now Business Applications

Please note that Financial Systems has changed its name to Business Applications. The distribution list for requests has also been updated to DL-BFBusinessApplications@umaryland.edu.

New Email for PCard Communications

SSAS has created a new email for communications regarding the PCard. Please send communications you previously directed to Regina Spencer, to the new email PCard-Admin@umaryland.edu. You can find this information on the SSAS website under the Corporate Purchasing Card selecting the PCard Administrator hyperlink.

PO Close email Reminder

The PO Close email that SSAS set up to streamline requests to close Purchase Orders has been working well. Remember, when you email PO_Close@umaryland.edu to request a PO to be closed, use the Subject line "**Close PO#XXXXXXXXX**" and provide the **PO# and Supplier name** in the body of the email. This additional information helps SSAS ensure they are closing the proper PO. If you are sending multiple POs in one email, use in the subject line "**Close multiple PO's**" and list each **PO# and Supplier name** in the body of the email. SSAS will send a confirmation email once the POs are closed. **SSAS reminds you to be sure that all receiving, and invoicing has been completed *before* submitting the request to close the PO.**

Clearing Requisitions from Workflow

Regularly clearing unneeded requisitions from your workflow in Quantum Financials is important to the accuracy of your encumbrance balances viewed in Quantum Analytics. Those who enter requisitions may notice there are some in your workflow that are no longer needed. They could have been returned by the Buyer, rejected, or otherwise abandoned. These unused requisitions will artificially inflate encumbrances in the Project commitment records and must be cleared from the workflow list. Steps for clearing the requisitions can be found on the Quantum website.

Quantum Training Schedule

Quantum Financials classes are designed to introduce new users to the application, but current users are welcome to join any class for a refresher. The Quantum Training Team delivers classes over WebEx and has selected course content that can be delivered in 3 hours or less, including time for your questions. Register by 5 PM the day before the class to receive an email with instructions for joining your virtual class session. You can register either via the financial calendar or the training registration database.

Please note that the Introduction to Quantum Financials class is a prerequisite to all Quantum Financials training classes and is offered monthly. Some Quantum Financials classes may have additional prerequisites. Please look for those requirements when registering via the Financial Calendar and Training Registration Database.

The March/April Quantum Financials training classes include:

Quantum Financials Course Name	Date/Time
Using Debit Memos for Accounting Transfers	Thu, Mar 17 - 9:00 AM – 12:00 PM
Searching for NONPO Suppliers	Mon, Mar 21 - 1:30 PM – 3:00 PM
Using NONPO Invoices as Check Requests	Tue, Mar 22 - 9:00 AM – 12:00 PM
Creating and Managing Customer Bills (Part 1)	Wed, Mar 23 - 10:00 AM – 11:30 AM
Viewing and Collecting CBS Receivables (Part 2)	Wed, Mar 23 - 1:30 PM – 3:30 PM
Reallocating and Approving PCard Transactions	Thu, Mar 24 - 10:00 AM – 12:30 PM
Billing USM and UMB Foundations (Part 3)	Fri, Mar 25 - 1:00 PM – 2:00 PM
Introduction to Quantum Financials	Wed, Apr 13 - 10:30 AM - 12:00 PM
Using Debit Memos for Accounting Transfers	Thu, Apr 14 – 9:00 AM - 12:00 PM
Searching for NONPO Suppliers	Mon, Apr 18 - 1:00 PM- 3:00 PM
Using NONPO Invoices as Check Requests	Tue, Apr 19 – 9:00 AM – 12:00 PM
Creating and Managing Customer Bills (Part 1)	Wed, Apr 20 - 10:00 AM – 11:30 AM
Viewing and Collecting CBS Receivables (Part 2)	Wed, Apr 20 – 1:30 PM- 3:30 PM
Billing USMF and UMBF Foundations (Part 3)	Fri, Apr 22 – 10:00 AM – 11:00 AM
Receiving Orders	Tue, Apr 26 - 1:30 PM - 2:30 PM
Creating & Approving Requisitions	Wed, Apr 27 – 9:00 AM - 12:00 PM
Reallocating and Approving PCard Transactions	Thu, Apr 28 - 10:00 AM - 12:30 PM

Information on required training for each Quantum Financials role is available on the Quantum Training and Support page. If you need additional information on Quantum training, please email DL-BFBusinessApplications@umaryland.edu to reach the Training Team. We're looking forward to seeing you soon!

The March/April Quantum Analytics training classes include:

Quantum Analytics Course Name	Date/Time
Case Studies Workshop – Focus on Sponsored Reporting	Thu, Mar 24 – 2:00 PM – 3:00 PM
Quantum Analytics Coaching Sessions (45 min timeslots)	Tue, Mar 25 - 9:00 AM – 4:00 PM
Sponsored Management Dashboard Intro	Tue, Apr 5 - 9:00 AM – 11:00 AM
All Activities Management Dashboard Intro	Wed, Apr 6 – 9:00 AM – 11:00 AM
Payroll Management Dashboard Intro	Thu, Apr 7 - 9:00 AM – 11:00 AM
Case Studies Workshop – Sponsored Reporting	Wed, Apr 27 – 9:00 AM – 10:00 AM
Case Studies Workshop – Sponsored Reporting	Thu, Apr 28 – 2:00 PM – 3:00 PM
Quantum Analytics Coaching Sessions (45 min timeslots)	Fri, Apr 29 - 9:00 AM – 4:00 PM

Quantum Analytics classes do not require advance registration. You can access all the sessions using this log-in information: https://umaryland.webex.com/join/bmerrick
Access code: 730 028 347 To phone in: 415-655-0001

Quantum Analytics User Aids are training and support learning resources located on the Quantum Analytics User Aids webpage on the Quantum website. They provide topic related information and include additional resources for Department end users.

Are you ready to share what you like about Quantum Analytics and which reports help you get your work done? The Quantum Training Team is always looking for new Analytics Showcase topics and presenters. Reach out to Buzz with your contact information at DL-BFBusinessApplications@umaryland.edu