



April 20, 2022

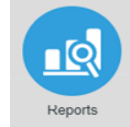


Volume 28, Issue 1

## Quantum Financials Notes

### Quantum Financials Reports

**The SPON Receipt Application Details Report (QFN237)** is a Billing & Collections report used for Sponsored Projects that has been added to the Reports Dashboard under the Quantum Financials (QF) Reports icon. This report can be run by Award (Contract) Number, Transaction Number, or Receipt Number and provides details about how the payment of a sponsored invoice was applied, including the Receipt Number and Applied Amount. This will be helpful when closing an Award where AR information is needed. The Applied Amount in this report matches with the Receipt Amount in the Quantum Analytics - Award Detail report under "What's been Billed & Collected on this Award." A [UPK](#) tutorial is available to help users walk thru how to use this report.



**SPON Receipt Application Details**

Contract Number

Transaction Number

Receipt Number

OK Reset ▼

Edit - Refresh - Copy

Contract Number	Contract Owning Organization	Receipt Number	Receipt Entered Amount	Applied Transaction Number	Applied Amount	Creation Date	Receipt Date	Receipt Application Date
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**The Activity & Purpose Hierarchy Reports (QFN234, QFN235)** have been added to the Reports Dashboard under the QF Reports icon. These reports are like the Org and Object Hierarchy reports already available as QF Reports and provide a way to view all **Activity** and **Purpose** values which have been loaded to Quantum Financials. All users with access to Quantum Financials can run these reports and view results. Users can select all or specific values at each level of the hierarchy from the Parent Level to the Activity & Purpose Description Level. There are UPK tutorials for both the [Activity Hierarchy](#) and [Purpose Hierarchy](#) reports.

### Report returns from Activity & Purpose Hierarchy Reports

#### QFN234 - Activity Hierarchy Report

PARENT4	PARENT3	PARENT2	PARENT1	ACTIVITY VALUE	FLAT	ACTIVITY DESCRIPTION
A00000					A00000	All Activities
	B00000				B00000	All Activities Summary
		C00000			C00000	All Activities Rollup
			D00000		D00000	All Activities Grouping
				E00000	E00000	Unspecified
				1COVID	1COVID	To track COVID-19 ATIP Funds From ICTR
				26027A	26027A	SOM COVID 19
				A1TIME	A1TIME	One Time Annual

#### QFN235 - Purpose Hierarchy Report

PARENT4	PARENT3	PARENT2	PARENT1	PURPOSE VALUE	FLAT	PURPOSE DESCRIPTION
A0000000					A0000000	All Purposes
	B0000000				B0000000	Summary
		C0000000			C0000000	Rollup
			D0000000		D0000000	Grouping
				E0000000	E0000000	Unspecified
				000086AH	000086AH	Family Meds Research AHEC Funds
				0000UMBF	0000UMBF	UMB Foundation
				0000USMF	0000USMF	USM Foundation



#### Inside this issue:

- QF Notes **Pg. 1**
- QF Reports
- SPON Receipt Application Details Report
- Activity & Purpose Hierarchy Reports
- Quantum Upgrades **2**
- Don't Default Customizations
- QA Notes **2**
- Transaction Date Ranges in Award Detail Report
- QA User Aids Webpage
- FYE Deadlines
- QA Seminars & Workshops **3**
- Important Reminders
- PO Close Email
- New Email for PCard
- Clearing Requisitions
- Clear Cache
- Quantum Help
- Quantum Training Schedule **4**

Find prior issues of Quantum Bytes [here](#)

## Quantum Upgrades

Quantum Analytics recently absorbed an upgrade. The Quantum support team did not identify any significant changes to the user experience. As always, if you see something that looks inaccurate when using the system, please send that information, with a screen shot, to [help@umaryland.edu](mailto:help@umaryland.edu) so that it can be investigated. Users are also reminded to clear your browser cache before signing in to either Quantum Financials or Quantum Analytics after upgrades so that any new features or fields will appear. The Quantum Financials support team is evaluating and preparing to test the next quarterly upgrade which will be received in May 2022. Look for more information about this upgrade in the next issue of Quantum Bytes.

## Don't Default Customizations

Saving customizations in Quantum Analytics can be a time saver but remember the best practice suggestion is to NOT set them up as a default. See the July 2020 [issue](#) of Quantum Bytes for more information about why and instructions to remove default customizations.

## Quantum Analytics Notes

### How to Show Transactions for a Range of Dates in Award Detail Report

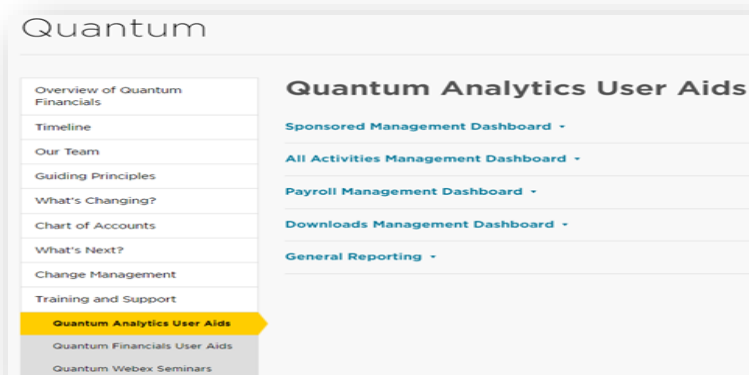
To assist users who are required to report financial data on a quarterly basis and/or for periods of months that cross fiscal years, a feature is available in the Award Detail report that provides the option to "Show Transactions for a Range of Periods." Users drill down from LTD (Life to Date) numbers and then specify the fiscal year(s) and specific months for which they want to show transactions. Reporting across specific date ranges is often required by Sponsors such as NIH. A [User Aid](#) with detailed instructions on how to use this helpful feature is available on the Quantum Training and Support Webpage.

What Timeframe Matters to You?  Show Transactions for Period Activity  Show Transactions for Range of Periods

Fiscal Year: 2022;2021 Fiscal Period Beg >=: MAY-21 Fiscal Period End <=: JUL-21  Exclude Cost Sharing

## Quantum Analytics User Aids Webpage has a New Look

Quantum Analytics User Aids are training and support learning resources located on the [Quantum Analytics User Aids](#) webpage on the Quantum website. The User Aids provide topic related information and include additional resources for Department end users. Open each Dashboard to find topic related User Aids for reporting instructions and examples.



## 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.





### Tips, Tricks & Troubleshooting for Sponsored Dashboard

This workshop provides user-friendly tips, tricks, and techniques specifically for Sponsored Management reports in Quantum Analytics including keyboard and mouse shortcuts, reducing report clutter, using report views and filters; drilling on column or row labels vs. drilling on numbers; report hyperlinks; learning resources, and more. We will also delve into troubleshooting techniques that will help you select, design, and leverage your Analytic reports for greater understanding.

### Actuals & Encumbrances in Transaction Details Union Report

This workshop introduces you to the broad range of reporting available in the Transaction Details Union reports and the User Aid "Cheat Sheets" designed to speed your reporting. Learn how to run, save, and export transaction detail reports for Actuals, Encumbrances, and/or both, providing a greater understanding of the columns of data that appear in each report.

## 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 Analytics Case Studies Workshop- Sponsored Reporting

Did you know that Sponsored reporting makes up most reports Analytics users run? This workshop focuses on best practices for the reports you run most often (like Award Detail and PI Profile), as well as easy to learn and use techniques to make data analysis more efficient (and even fun!). We will discuss how you can leverage the power and versatility of the Search report, and 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. The User Aid(s) and PowerPoint presentation will be sent out in advance of the workshop.

### Quantum Analytics Coaching Sessions

Once a month, Quantum Analytics users are invited to schedule 45-minute timeslots for individual or small group coaching 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 *your* topics. To schedule a time slot, please contact Buzz Merrick at [bmerrick@umaryland.edu](mailto:bmerrick@umaryland.edu).

## Important Reminders

### Quantum Help Desk

The Quantum support team asks that you please keep sending your Quantum requests for help to [help@umaryland.edu](mailto: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.

### 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](mailto:PO_Close@umaryland.edu) to request a PO to be closed, use the Subject line "Close PO#XXXXXXXX" 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.**

### 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](mailto:PCard-Admin@umaryland.edu). You can find this information on the SSAS website under the [Corporate Purchasing Card](#) selecting the PCard Administrator hyperlink.

### 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 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 April/May Quantum Financials training classes include:**

Quantum Financials Course Name	Date/Time
Billing USM and UMB Foundations	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 & Approving PCard Transactions	Thu, Apr 28 - 10:00 AM - 12:30 PM
Introduction to Quantum Financials	Fri, May 20 - 9:30 AM - 11:00 AM
Searching for NONPO Suppliers	Mon, May 23 - 9:00 AM - 10:30 AM
Using NONPO Invoices as Check Requests	Mon, May 23 - 1:00 PM - 4:00 PM
Using Debit Memos for Accounting Transfers	Tue, May 24 - 9:00 AM - 12:00 PM
Reallocating & Approving PCard Transactions	Tue, May 24 - 1:00 PM - 3:30 PM
Creating and Managing Customer Bills (1)	Wed, May 25 - 10:00 AM - 11:30 AM
Viewing and Collecting CBS Receivables (2)	Wed, May 25 - 1:30 PM - 3:30 PM
Receiving Orders	Thu, May 26 - 11:00 AM - 12:00 PM
Creating & Approving Requisitions	Thu, May 26 - 1:00 PM - 4:00 PM
Billing USM and UMB Foundations (3)	Thu, Jun 2 - 10:00 AM - 11:00 AM
Quantum Planning and Budgeting Course Name	Date/Time
Planning and Budgeting in QPB	Tue, May 3 - 9:00 AM - 12:00 PM

*Note: Searching for NONPO Suppliers is now a separate class and a pre-requisite for Using NONPO Invoices for Check Requests*

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](mailto:DL-BFBusinessApplications@umaryland.edu) to reach the Training Team. We're looking forward to seeing you soon!

**The April/May Quantum Analytics training classes include:**

Quantum Analytics Course Name	Date/Time
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
Sponsored Management Dashboard Intro	Tue, May 3 - 9:00 AM - 11:00 AM
All Activities Management Dashboard Intro	Wed, May 4 - 9:00 AM - 11:00 AM
Payroll Management Dashboard Intro	Thu, May 5 - 9:00 AM - 11:00 AM
Quantum Analytics Coaching Sessions (45 min timeslots)	Thu, May 26 - 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](mailto:DL-BFBusinessApplications@umaryland.edu)