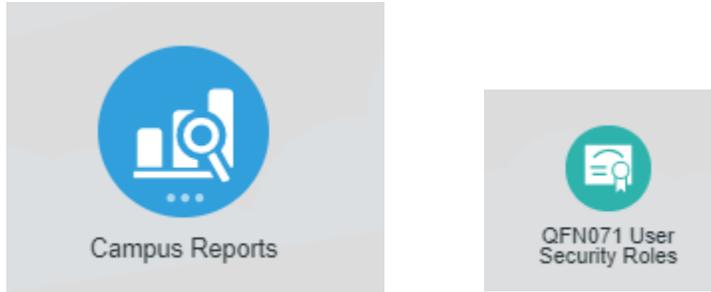University of Maryland, Baltimore
Quantum Financials Role Validation Instructions

Purpose: Instructions for accessing the Quantum Financials User Security Roles report and DocuSign to complete the role validation process.

1. Sign into Quantum Financials and navigate to Campus Reports > QFN071 User Security Roles report

2. At the prompts, enter the School, Department, or Org value for which you will be validating and select the User Security Roles PDF tab. Click Apply.
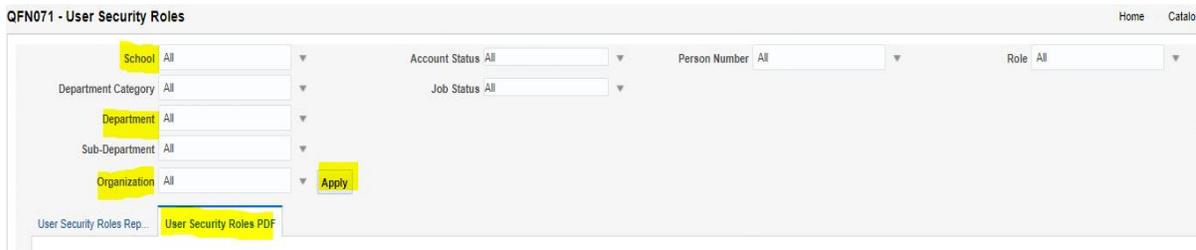
3. Results will include a cover page showing the prompts you entered, pages of users and their security roles (sorted by person number - i.e., EmplID), and a final page with the certification statement for the School, Department(s), or Org(s) you entered and signature lines. You will complete this certification using DocuSign. (instructions starting with step 6 below)

**University of Maryland, Baltimore**
Quantum Financials

I validate that the individuals that are assigned to these roles for the following

organization(s): 06206000-Change Mangmnt & Advisory Serv

are, accurate and in fact, the appropriate staff persons(s) to perform the duties at the specific date stated on the document.

Name: _____ Title: _____

Signature: _____ Date: _____

4. Validate that everyone is still a valid employee and has the appropriate roles for their job duties. If any changes need to be made, submit a Quantum Financials User Authorization form. Updates may take up to two business days. After the role updates are made, run the same report again to get a final version that will be signed and sent to rolevalidation@umaryland.edu. Tools that may be helpful when completing this steps are the Quantum Role Definitions and Quantum Financials Role Mapping Template.

5. Once you have validated the final version of the User Security Roles PDF report, select the printer icon in the top right corner and choose the Destination "Save as PDF" then click Save to name the file and save it in a folder of your choosing.
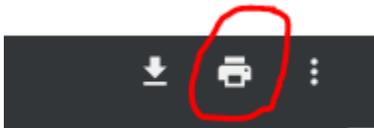
6. Access DocuSign and set up your account with the following steps:

   a) To Login, click: https://account.docusign.com
   b) At the DocuSign Login page, enter your UMB email address
   c) Click the yellow "CONTINUE" button
   d) You will be directed to the UMB Login to DocuSign page
   e) Enter in your UMID and Password
   f) Click the "Login" button
   g) Complete DUO authentication
   h) Once authentication is complete then you will arrive at your DocuSign home page
   i) Watch the DocuSign Account Video Tour to learn how to navigate within DocuSign

7. If you are not already set up as a DocuSign Sender, request the Sender role using the DocuSign Security Change Request form before you continue. It may take one business day to process so please plan accordingly. Training is not required before the role request is granted, but it is suggested. Training information is available at www.umaryland.edu/docusign.

8. As a DocuSign sender, you can now start to sign your own document. Click the red Start button, choose Sign a Document and Upload the User Security Roles PDF report you saved earlier. Clicking Sign will

open that document in DocuSign. Click the red Continue button and page down to the last page with the certification statement and signature lines.

9. You can then drag and drop the appropriate fields from the left menu options onto the lines of the report. When you are done, click the red Finish button.

10. Fill in the Sign and Return box with the name and email address as follows (see below) and **change the Subject line to the School, Department or Org number(s) the signed report represents**. When completed, click Send and Close.

11. That will send the completed and signed Quantum Financials User Security Roles report to the role validation email box. CMAS will monitor this box and follow-up with the sender if there are any questions. You can now log out of DocuSign.

12. For assistance with the DocuSign process outlined here, view this video. You can also contact CMAS using rolevalidation@umaryland.edu.