



*A leap forward. Transforming systems.
Empowering People!*

Business Process Education
***— Purchasing and Paying for
Goods and Services with Quantum***

July 2, 2019

Disclaimer

- This is not meant to be **TRAINING** – training will be offered closer to Go-Live – some will be required to get Quantum access



- Today's purpose is to start exposing users to business process changes and new terminology
- PCard is covered in a separate session
- Some business processes are still evolving

Agenda

Business Processes under Quantum

➤ What is Not Changing

➤ What is Changing

➤ Business Processes

- Requisitions
- Purchase Orders and Agreements
- Receiving
- PO Invoices
- NONPO Invoices for Payment Requests (formerly PUR02, EZ Pay, Working Fund)
- Supplier Registration



What is Not Changing



- Purchasing options
 - Requisition (\$5,000 and above)
 - PCard (less than \$5,000)
 - Payment Requests (non-travel payments/reimbursements, working fund checks)
- Requisitions created and approved in departments
- Strategic Sourcing and Acquisition Services (SSAS) will sign agreements with suppliers and create POs

What is Not Changing

- Receiving needed to complete the match with POs and invoices
- Financial Services – Disbursements (AP) receives invoices from suppliers
- Payment Request Forms and hard copy supporting documentation must be sent to AP – State requirement
- SSAS will monitor payment requests to identify any that should be on a PO

What is Changing

- Chart of Accounts – forms
- Catalog and Non-Catalog Requisitions
- Temporary Requisitions
- Buyer Created or Touchless POs
- Change orders



What is Changing

- Purchase Agreements and Invoices viewable in Quantum
- 100% Receiving - no \$5,000 threshold
- Payment requests (e.g., PUR02, EZ Pay, Working Fund) created and approved in Quantum as NON PO invoices
- Supplier registration process - new



Business Process Requisitions

Business Process - Requisitions

➤ Non-Catalog - Catalog – Smart Form - Temporary

➤ Non-Catalog Requisition

- SSAS will still create PO and send manually

➤ Catalog Requisition

- Internal or External (Punch-Out)
- Auto creates a PO and sent via email (Internal Catalog) or electronically (External Catalog)
- Self-Serve - No human intervention after department approval (Touchless)



Non catalog Requisition

Requisition: 1000000091

Check Funds

View Life Cycle

Actions ▼

Done

Requisitioning
BU PO

Entered By Stacy Holton

Description Utility Services

Creation Date 06/20/2019

Status Approved

Justification

Requisition Amount 100,000.00 USD

Approval Amount 100,000.00 USD

Funds Status Liquidated

Attachments None

Requisition Lines

Actions ▼ View ▼ Format ▼ Freeze Detach Wrap

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Fund
1		Utility Services	Electricity				100,000.00	Approved	Liquid

Rows Selected 1 Columns Hidden 13

Line 1: Details

Requester Stacy Holton

Destination Type Expense

Requested Delivery Date 06/20/2019

Buyer Joseph Evans

Deliver-to Location Type Internal

Suggested Supplier BALTIMORE GAS AND ELECTRIC



Deliver-to Location 670 W. Baltimore Street

Supplier Item





Billing

View ▼ Format ▼ Freeze Detach Wrap


Catalog Requisition




Search



SH



Purchase Requisitions




My Receipts

Requisitions

More Tasks


Manage Requisitions

Shopping Lists

 1

Shop by Category

Search



HiTouch Business Services (1)

Rudolph's Office Supply (1)

▶ UMB Purchasing Hierarchy (116)

1000000093testIncomplete


1000000091Utility Services✔ Approved

1000000087Spectrometer✔ Approved

1000000086Amish II Study✔ Approved

R2NW0000036BindersIncomplete


Recent Purchases



Amish II Study

\$0.00 EA


1



Change Order Line


\$7,083.22 EA

1



Automation - Biome

View More



Catalog Requisition

[Home](#)[Quick Order](#)[Ink And Toner ▼](#)[Favorites ▼](#)[Contracts ▼](#)[My Accounts ▼](#)[Live Chat Online](#)[Search](#)

0 items : \$0.00

[Exit](#)

Welcome back, Holton.Stacy.20340087

Acct: R2351-UNIVERSITY OF MARYLAND AT BALT

[Browse by Category ▼](#)[Featured Items](#)

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BALTIMORE

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Mark Mooney

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Business Process - Requisitions

➤ Smart Form Requisitions

- Consultant – to set up a consultant relationship
- Subrecipient – to set up a subrecipient relationship
- Change Order – to request a change to an approved PO

Smart Form Requisitions



Purchase
Requisitions



My Receipts

Requisitions

More Tasks ▼

Manage Requisitions

Shopping Lists ▼



Shop by Category ▼

Search



Recent Requisitions

[View More](#)

1000000093	test	Incomplete
1000000091	Utility Services	✓ Approved
1000000087	Spectrometer	✓ Approved
1000000086	Amish II Study	✓ Approved
R2NW0000036	Binders	Incomplete

Recent Purchases

[View More](#)



Amish II Study



Change Order Line



Automation - Biome



\$0.00 EA

1

\$7,083.22 EA

1



Request Forms

- [Change Order Form](#)
- [Service Consulting](#)
- [Subrecipient Requisition](#)

Information and Tips

- [Department Approvers](#)
- [Purchasing Guide](#)

Business Process - Requisitions

- Temporary Requisitions
 - In response to user requests
 - To reserve funds for a future planned expenditure
 - Auto approved – no workflow
 - No PO generated
 - Needs to be manually canceled

Business Process - Requisitions



➤ Approvals

- Workflow approval notices will go to all department approvers
- Multi-Department – Approval needed from each department
- Departments will use dashboard to monitor approval status and progress to PO
- SSAS will check accuracy of Purchasing Categories and notify departments of corrections
- Financial Services - General Accounting will not approve Requisitions

Dept. Approvals Notification

The screenshot displays the UMB Quantum user interface. On the left, a user profile for Patricia Parkent (PP) is shown with a blue sky background. Below the profile, there are statistics: 1 Conversation, 0 Following, and 0 Followers. There are also links for 'Employee News' and 'My Flags'. On the right, a 'Pending Notifications' dropdown menu is open, showing two identical notifications: 'Action Required: Approve Requisition 1000000045' by Sakti Nandi, dated 3 weeks ago. The background of the interface features a grid of icons for 'Social', 'Getting Started', 'My Dashboard', 'Marketplace', and 'Tools'. A red box highlights the notification icon in the top right corner, which has a red circle with the number '2' next to it.

UMB QUANTUM

Search

PP

PP

Patricia Parkent

Share thoughts with your colleagues...

1 Conversations | 0 Following | 0 Followers

0 Employee News

0 My Flags

Pending Notifications

More Details

Enter search terms

Action Required: Approve Requisition 1000000045 3 weeks ago
Sakti Nandi

Action Required: Approve Requisition 1000000043 3 weeks ago
Sakti Nandi

Social

Getting Started

My Dashboard

Marketplace

Tools

Business Process - Requisitions



Amendments

- Only for Non-Catalog Requisitions and before PO
- Required if Requisition is rejected/returned to department by SSAS
- Catalog Requisitions cannot be amended



Departments can track Requisition lifecycle

- Status, Approvals, Reassign Ownership
- Printable Requisitions

Printable Requisition

UMB
QUANTUM

Search

13

SH

Requisition: 1000000091

Check Funds

View Life Cycle

Actions

Done

Requisitioning BU

PO

Creation Date

06/20/2019

Entered By

Stacy Holton

Status

Approved

Description

Utility Services

Justification

Requ

A

Approval A

Funds

Attach

Duplicate

Reassign

View Document History

View PDF

Edit Order

Requisition Lines

Actions

View

Format

Freeze

Detach

Wrap

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Fund
1		Utility Services	Electricity				100,000.00	Approved	Liquid

Rows Selected 1

Columns Hidden 13

Line 1: Details

Requester

Stacy Holton

Requested Delivery Date

06/20/2019

Deliver-to Location Type

Internal

Deliver-to Location

670 W. Baltimore Street

Destination Type

Expense

Buyer

Joseph Evans

Suggested Supplier

BALTIMORE GAS AND ELECTRIC

Supplier Item

Printable Requisition

1000000091.pdf

1 / 1



Report Date 2019-06-27 1:54:04 PM
Page 1 of 1

INTERNAL USE ONLY- THIS IS NOT A PURCHASE ORDER
University of Maryland
Requisition

Requisition Number 1000000091

Requisitioning BU PO
Entered By Stacy Holton

Requisition Amount 100,000 USD
Status Approved

Lines

Line	Description	Quantity	UOM	Price	Amount (USD)
1	Utility Services			USD	100000.00

Requester Stacy Holton
Deliver-to Address 670 W. Baltimore Street,
Baltimore, MD 21201,
UNITED STATES

Supplier BALTIMORE GAS AND ELECTRIC
Supplier Site 1-PO BOX 13070


Note to Buyer
Note to Receiver

Distributions

Distribution	Charge Account	Budget Date	Percentage	Quantity	Amount (USD)
1	3530-105-10213000-000000-000000000- 210-00-00000-000	06/20/2019	100		100000.00

Comments

End of Report



Business Process

Purchase Orders and Agreements

Business Process - Purchase Orders

- Auto created for Catalog Requisitions (Touchless)
- Buyer created for Non-Catalog and Smart Form Requisitions
- No PO for Temporary Requisitions
- Approvals - Workflow within SSAS based on approval thresholds
- Buyers will be able to close PO

Business Process - Purchase Orders

➤ Change Order

- Departments will create Change Order Smart Form Requisition to amend an already approved PO
- Cannot be done for Catalog PO – must create new Requisition
- SSAS Buyers will use department created Smart Form Requisition to initiate change to existing PO



Business Process - Agreements

- Purchase Agreements will be available in Quantum for departments to access
- SSAS will keep Agreements updated
- Blanket Purchase Agreements (BPA)/Standing Orders/Internal Catalog
- Some Agreements will only be accessible to specific departments



Business Process Receiving

Business Process - Receiving

- Departments must Receive on all PO goods and services – no longer using a \$5,000 threshold
- Invoices will not be paid until Receiver is done
- Requestors will get system notifications of Invoices on hold awaiting Receipt
- You can Receive on behalf of others
- No longer need to send Receipt information to AP



Business Process PO Invoices

Business Process - PO Invoices

- PO Invoices should still be received in AP
- AP will redact any Personally Identifiable Information (PII) and scan Invoices into Quantum
- Chart of account/project distribution details - pulled from PO
- Departments will have access to view Invoices - based on role
- Invoices can be placed on hold if not validated (e.g., missing documentation/receipts, amount/quantity does not match PO)

PO Invoice



Invoice: TR-3403 LYP 6/20/19

Done

Business Unit PO

Legal Entity Name University of Maryland
Baltimore
Supplier or Party BALTIMORE GAS AND
ELECTRIC
Supplier Site Baltimore
Address P.O. Box 1475,
Baltimore, MD 21203
Invoice Date 06/20/2019

Invoice Amount 6,000.00 USD

Unpaid Amount 6,000.00 USD

Payment Currency USD

Conversion Rate Type

Conversion Rate

Conversion Date

Invoice Type Standard

Intercompany invoice No

Description PO different remit
address

Funds Status Reserved

Attachment None

Lines Payments


Items

View Detach

Line	Amount	Description	Budgetary Control		Quantity	Unit Price	UOM Name	Purchase Order		
			Budget Date	Funds Status				Number	Line	Schedule
1	6,000.00	Utility Services	06/20/2019	Reserved				1000000058	1	1

Summary Tax Lines

Shipping and Handling



Business Process

NON PO Invoices for Payment Requests

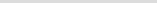





Business Process – NON PO Invoices for Payment Requests

- Departments will create Non PO Invoices for Payment Requests
 - General Working Fund (GWF) payments
 - State payments
 - RSTARS transfers
- Replaces PUR02 and EZ Pays
- Department approval will be via workflow
- Will see more details in Quantum (Working Fund, RSTARS)

Business Process – NON PO Invoices for Payment Requests

- Departments will still complete and send hard copy request forms, original invoices and supporting documentation to AP
- AP will mask PII and attach documentation in Quantum
- AP will receive Non PO Invoices via workflow – will hold until hard copy documentation is received
- SSAS will be part of the workflow and will monitor for requests that should be on PO

NON PO Invoice


Search




WF 

Manage Invoices

Done

Search Results TR-4865

Invoice Details

Validated

Actions ▼

Save

Save and Close

Cancel

Invoice Date 06/11/2019

Invoice Amount 600.00 USD

Business Unit NONPO

Invoice Type	Standard
--------------	----------

Applied Prepayments	0.00 USD
---------------------	----------

Payment Business Unit NONPO

Supplier or Party GROB,MICHELE

Payment Terms	Immediate
----------------------	-----------

Supplier Site  **Primary**

Unpaid Amount 0.00 USD

Payment Currency	USD
------------------	-----

Address 5491 ROSS COURT,
NEW MARKET, MD-
21774

Holds 0

Notes

Attachments None +

Lines Holds and Approvals Payments **Installments**

Items

View ▼

用



Detach

Line	Amount	Description	Quantity	Price	UOM Name	Purchase Order			Rec
						Number	Line	Schedule	Number
1	325.00								
2	275.00								



Business Process Supplier Registration

Business Process - Supplier Registration

New suppliers must be registered and spend authorized to pay invoices

PO Invoices

- SSAS Buyers will initiate supplier registration
- SSAS Supplier Manager will approve and change to Spend Authorized

NON PO Invoices (payment requests)

- Departments will select from existing suppliers or initiate supplier registration if new
- AP will approve and change to Spend Authorized
- Department will get bell notification when supplier is spend authorized
- If duplicate supplier registration is received, AP will notify department of existing supplier

Supplier Registration

Register Supplier

Register

Cancel

Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.

Registration Details

* Company Swanson Catering II

* Request Reason Check Request

Justification State Payment

Procurement BU

* Business Relationship Prospective

Company Details

* Tax Organization Type Corporation

Supplier Type State

Corporate Web Site swansonfood.com

Attachments None

D-U-N-S Number

Tax Country United States

Taxpayer ID 811234567

Tax Registration Number

Contacts

Actions View Format + Freeze Detach Wrap

Name	Job Title	Email	Administrative Contact	Request User Account
Pogliano, Laura	UMB	lpogliano@umaryland.edu	✓	—

Columns Hidden 7

Addresses


Actions View Format + Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose
Primary	123 Main Street, Baltimore, MARYLAND 21214		Ordering; Remit to

Columns Hidden 3

Business Classifications

☐ None of the classifications are applicable



Stay Tuned for More Quantum Information

Quantum website – www.umaryland.edu/quantum

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Roles

