

Tips, Tricks, & Troubleshooting Sponsored Management Dashboard

Dashboards

Right Click
Techniques

When to
clear cache?

Quantum Analytics Report Search Bar

Type Here to Search

Refresh

Org Health Check

Org Health Check

Provides various metrics, key performance indicators, and compliance statistics for all levels of the University's organizational structure.

Get Started with Quantum Analytics!

Several resources are available to help you get familiar with Quantum Analytics.

Step through UPK tutorials [here](#).

Find User Aids [here](#).

Find Analytics WebEx Workshop Seminar Recordings [here](#).

Visit the Training and Support page of the Quantum website [here](#)

for other training information and links, such as recorded Webinars, Training FAQs, and the Quantum Organization Hierarchy.

Additional Functionality Now Available:

Report Search Bar on Landing Page

Transaction Details Union Report (QA6.P7)

What is the Balance of Object 7062 and 7072 on this Award/Project?

What are my POs on this SOAPF Code or Award/Project?

All Activities Management

Trends

Provides various graphical and tabular displays to analyze trends in revenues and expenses.

All Source

Provides revenue and expense detail across sources. Includes net asset rollforward. Drillable to SOAPF detail.

Search

Tool to identify SOAPF codes meeting various criteria. Drillable to Budget to Actual Detail.

Budget to Actuals Summary

Analyzes revenues and expenses with comparisons to budget and previous fiscal years, summarized by chart of account segments.

Budget to Actuals Detail

Comprehensive review of activity for a single SOAPF code. Includes comparison to budget, previous fiscal years, and various reports on transactions and current balances. Ideal for managing an individual budget. Drillable to transaction detail.

Improved
Reports

Sponsored Management

Trends

Analyze year-over-year trends of sponsored proposals, awards, and expenditures on a fiscal year basis. Includes graphical and tabular displays of the data.

Search

Identify Quantum awards and Quantum projects meeting various criteria. HINT: To search Kuali Research proposals and awards utilize the Kuali download pages on the download dashboard.

PI Profile

Provides a one-stop shop to provide information on the entire sponsored portfolio of an individual Principal Investigator. Drillable to Award Detail for a deeper analysis of each award.

Award Detail

Comprehensive details necessary to manage an individual award or project. Includes budget to actual as well as various reports of revenue and expense activity on an inception-to-date basis.

Find My Award

Having trouble finding your Award Number but you know other attributes like the Project Number, PI, Owning Organization, and Sponsor? Use this page to more quickly identify Awards.

F&A Yield

Displays "F&A Yield" – a calculation of the yield of the effective indirect cost rate, expressed as a percentage of total direct costs. Page provides users the option to see the results either with or without Cost Share.

SPP 7062 Activity

Displays all study participant payment (SPP) activity processed through Object 7062 (Cash Study Participant Pay), including the initial issuance of the working fund check and the debit memo charges to Object 3125 (Participant Study Pay Group) reflecting distributions to participants. Drillable to NONPO invoice and debit memo details.

Payroll Management

Payroll Portfolio by Home Department

Displays how the labor costs of individuals employed by an organizational unit are funded across sources and by funding organization. Drillable to various levels of detail (employee, SOAPF, project).

Payroll Portfolio by Funding Department

Displays what labor costs an organizational unit is funding across its sources and by the home department of the employees' whose salaries they are funding. Drillable to various levels of detail (employee, SOAPF, project).

Payroll General Ledger Details

Analyze payroll activity charged to an individual SOAPF code.

Payroll Sponsored Details

Analyze payroll activity charged to an individual sponsored award or project.

Employee Detail

Analyze payroll charges for an individual employee across all of their funding sources. Available only to those with the Payroll Analyst role.

Trans Detail
vs. R50

Downloads Management

Quantum GL Balances

Download General Ledger Balances by fiscal period at the OSOAPFUF1 level. Amounts include fiscal period actuals, year-to-date actuals and encumbrances, and annual budgets.

Quantum Awards

Download Quantum Awards with budgets, revenues, billings, costs and commitments summarized at the award level. Also includes demographic data describing the awards. All data from Quantum Financials.

Quantum Projects

Download Quantum projects with budgets, revenues, billings, costs and commitments summarized at the project level. Also includes demographic data describing the projects and the awards with which they are associated. All data from Quantum Financials.

HRMS Payroll

Download payroll charges detail by employee, object, SOAPF, POETAF (if applicable), affected pay period, and posted pay period. Available only to those with the Payroll Analyst role.

Kuali Proposals

Provides a summary of proposals download detail

Kuali Awards

Download Kuali Research award information at the award and project level.

Transaction Details Union

Find and download transaction detail information across all sub-ledgers.

Goals



- ✓ To become familiar with a variety of tips, tricks, and troubleshooting techniques that will help you spend more time analyzing data than gathering it!
- ✓ To explore User Aids and other Learning Resources.
- ✓ To provide an opportunity to share tips and tricks **you** have discovered in your use of Analytics.



Agenda



- Tips & Tricks for:
 - Sponsored Management Dashboard Reports
 - R50 Reports in Award Detail & Budget to Actuals Detail
- Misc. Troubleshooting Techniques
- Quick tips for Transaction Union Detail reports
- Any tips you have to share?

Sponsored Management

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Sponsored Tips

Sponsored Reporting Tips/Techniques

- **Right Click (RC) on Object Level C** and select **Include > Object** - this is a quick & easy way to view your list by Object Code (this technique is NOT available in the All Activities reports)
 - You can also RC to include Project and/or Funding Source as a column
- If you “*Exclude*” a column, it is always available to be “*Included*” later
- **RC to Sort** by a column and to **Move** a column
- 5 Report Selectors

Object Level C	Period Activity Amount	Budget	LT
C100-S	196.70	\$3,466,830.00	\$2
C200-F	182.11	\$973,035.00	\$
C300-C Expense	907.68	\$952,569.00	\$1
	286.49	\$5,392,434.00	\$4
C300-C Expense	079.80	\$2,093,884.00	\$
	150		
C600-Indirect Costs	\$70	Funding Source	Object
	\$70	Exclude Cost Share Flag	
	\$70	Project	

Report Selector:

- What Are The POs and PRs On This Award?
- Who Is This Award/Project Funding?
- What Is The History Of Funding On This Award?
- What Has Been Billed And Collected On This Award?
- What is the activity on the 7062 & 7072 Cash Been On

Sponsored Tips/Techniques Cont.

Drill Down on numeric values provides:

- LTD (Lifetime to Date) drill down reports transactions for the *current period or range of periods*

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

AND Pivot View or All Columns (Trans Detail) View

Show Me All of My Transactions (QA4.P4.D4.R3)
Run by: Byron Merrick
Time run: 9/23/2021 2:18:54 PM

Object Level	Object Code	Object Description	Project	Transaction Type
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View By: Pivot View
Pivot View
All Columns

Sponsored Tips/Techniques Cont.

Projects on this Award

Award Profile Card

Award Number: 1400685A
Award Name: A Genomics Based Investigati

Status: Active
Type: 315-C&G- Federal
Billing Basis: LOC
Start Date: 4/15/2014
Adj Start Date: 4/15/2014
End Date: 3/31/2024
Adj End Date: 3/31/2024
Pre-Award Date: 12/31/1899
Cost Structure: MTDC
F&A Rate: 54.50%

Owning School: C1000000~School Of Medicine
Owning Department: E1021300~SOM Institute Of Genome Science E
Owning Org: 10213000~SOM Institute For Genome Scien
CFDA Number: 93.855
Allocated Funding Amount: \$10,865,278.42
Direct Funding Amount: \$8,626,632.44
Indirect Funding Amount: \$2,238,646.00

Sponsor Number: 00
Sponsor Name: Natio
Infect
Sponsor Type: NIH F
Sponsor Award Num
PI Employee ID: 0163
PI Employee Name: f

Projects on this Award
(All Column Values)

- (All Column Values)
- 10023632-Child: GCID - Project 3-3
- 1400685A2C4-Child: GCID - Project 3
- 10023630-Child: GCID - Core C - Data Co

What Is The LTD Accrued and LTD Billed On
NOTE: LTD Accrued and LTD Billed \$ only exist in
Time run: 11/4/2021 11:47:12 AM

LTD Billed:	(\$7,104,615.60)
LTD Costs:	\$7,212,969.56
Billed - LTD Costs:	\$108,353.96

By Project "View"

What is the Budget to Costs and Commitments Summary for this Award/Project? (QA4.P4.R10)
Time run: 11/4/2021 11:51:40 AM

By Project ▼

Project	Period Activity Amount	Budget	LTD Costs	Raw Commitments	Projected Total Cost
10023563-A Genomics Based Investigation	\$0.00	\$221,745.00	\$217,951.23	\$0.00	\$217,951.23

WSearch... vaward/Project? (QA4.P4.R10)

Sponsored Reporting Tips/Techniques Cont.

- **PI Profile improved** – to show Active vs. Inactive – helps report run much faster!
- **Search report** – Right Click (RC) to Move Left or Right (or to Prompts & Sections)
 - Is VERY flexible to report at the Dept level, Billing Basis, PI(s), Key Personnel, and more!
- **Hyperlinks** take you from the Search results to the Award Detail report
- These 3 reports developed for targeted users:

[QA4.P6 - F&A Yield](#) [QA4.P7 - 7062 Activity](#) [QA4.P9 - 7072 Activity](#)

PI Profile for

Show Me All Of My: Awards Projects

What Is The Status Of My Awards? (QA4.P3.R1)
Time run: 9/23/2021 2:05:29 PM
[Refresh](#) - [Print](#) - [Export](#)

Show Active Awards Inactive Awards

R50 Report Tips

Found in **Award Detail** and
Budget to Actual Detail reports



What Are The Transactions Impacting Operating Expenses Commitments? (QA3.P5.R50)

Run by: Byron Merrick

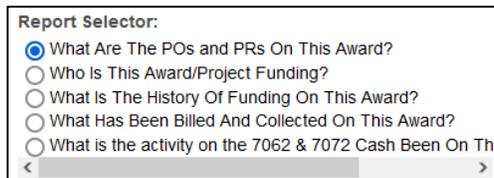
Time run: 9/29/2021 9:36:20 AM

R50 Tips/Techniques

Accessed on the left side using “Report Selectors”

➤ “These are secondary reports found in:

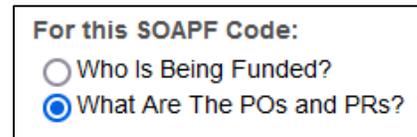
Award Detail



Report Selector:

- What Are The POs and PRs On This Award?
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Budget to Actuals

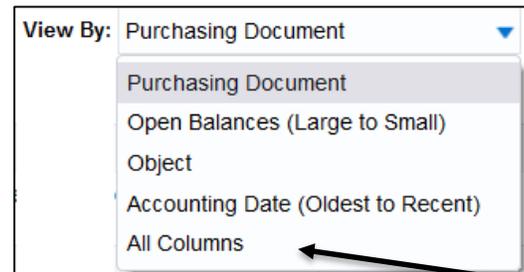


For this SOAPF Code:

- Who Is Being Funded?
- What Are The POs and PRs?

➤ Enjoy the “View(s)”

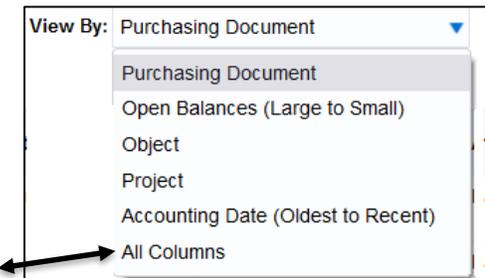
5 “View By” in Budget to Actuals Details



View By: Purchasing Document

- Purchasing Document
- Open Balances (Large to Small)
- Object
- Accounting Date (Oldest to Recent)
- All Columns

6 in Award Details



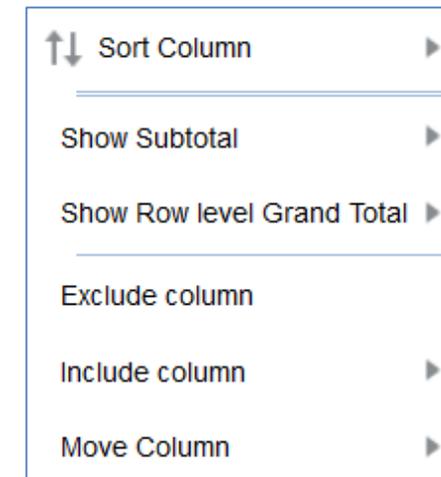
View By: Purchasing Document

- Purchasing Document
- Open Balances (Large to Small)
- Object
- Project
- Accounting Date (Oldest to Recent)
- All Columns

“All Columns” is Transaction Union Details! 56 columns

R50 Tips/Techniques Cont.

- **Right Click (RC)** to Include other columns
- **RC and Move to Prompts** to reduce “clutter”
- **RC and Move to Sections** to have one long list broken down by sections – no need to click the double headed blue arrow to expand the list
- Use the [Encumbrances Cheat Sheet](#) for R50 column definitions



R50 Tips/Techniques Cont.

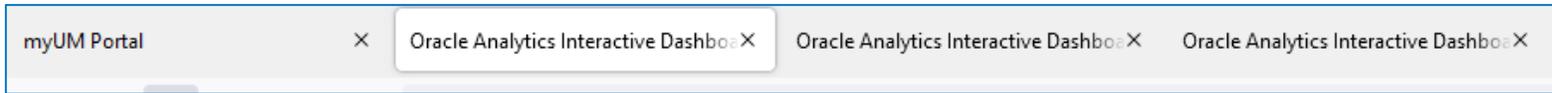
- Use the [Encumbrances Cheat Sheet](#) for R50 column definitions
- Examples of Columns you may wish to include are:
 - ✓ Account Combo = OSOAPFUPI
 - ✓ Attribute 4 = Req #
 - ✓ Attribute 6 = Invoice Paid (Y)
 - ✓ Attribute 7 = Posted Pay Period End Date

The screenshot shows a software interface with a column selection menu on the left and a data table on the right. The menu lists various columns, with 'Acct Cmb' and 'Attribute 4' highlighted with purple boxes. The data table has columns for values and percentages, with a red arrow pointing to the 'Include column' option in the menu.

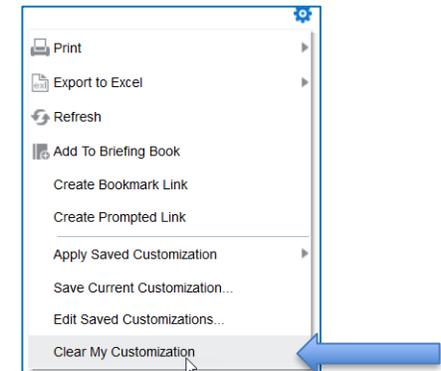
Column	Value	Percentage
Acct Cmb	\$394,445.30	78.97%
Attribute 3	\$214,973.75	78.97%
Attribute 4	\$214,973.75	78.97%
Attribute 6	\$609,419.05	78.97%

Misc Tips/Troubleshooting

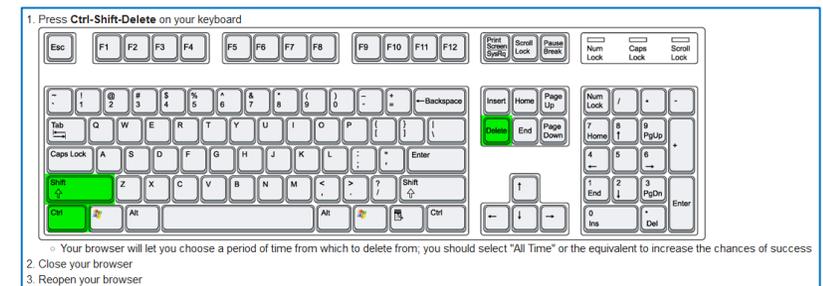
- Use **Control + Page Up** or **Page Down** to manually move from one **browser tab** to another (*Edge, Chrome, Firefox*)



- **Clear Customizations** to begin a brand new report or to start over – also helpful if the spinner doesn't stop!



- **Clear Cache Daily** – use **Control + Shift + Del**
 - Also, clear cache, close and reopen browser is helpful!



Misc Tips/Troubleshooting Cont.

- ❖ Have **more than one** Analytics session open
- ❖ **Copy/Paste columns** from Analytics to Excel (select one column at a time or use Shift + Click to select multiple columns)
- ❖ Dashboard Prompt “**Search**” Tip – copy paste a SOAPF or Award number instead of typing
- ❖ **Save Customization** Tip – type an existing report name in the Save section to “Replace” the report (update) with the same name (“yes” to replace)
- ❖ Any Requisitions with **leading zeros** were “converted” at Go-Live (so they begin with zeros)
 - Example: 0000043670 – all others begin with a “1” (1000000762)
- ❖ **Leverage Quantum Financials “Campus Reports”** (e.g. QFN129 Project SOAPF Combo; QFN130 Pcard Transactions, and more!)



New Reports in Sponsored Dashboard

SPP 7062 Activity

Displays all study participant payment (SPP) activity processed through Object 7062 (Cash Study Participant Pay), including the initial issuance of the working fund check and the debit memo charges to Object 3125 (Participant Study Pay Group) reflecting distributions to participants. Drillable to NONPO invoice and debit memo details.

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Transaction Union Detail Tips

- **Now includes** Actuals, Encumbrances, and Both reports
- Use a **minimum number** of Dashboard Prompts
 - Fiscal Year Prompts; Award, Project, SOAPE – then apply
- When the report opens, **RC on Transaction Type** and
 - Apply Subtotals
 - Move to Prompts
 - Move to “Sections
- When you **Move** to columns, it always lands in the left most column in the dataset (the report)

Recommended User Aids

Quantum

Overview of Quantum Financials

Timeline

Our Team

Guiding Principles

What's Changing?

Chart of Accounts

What's Next?

Change Management

Training and Support

Quantum Analytics User Aids

Quantum Financials User Aides

Frequently Asked Questions

Quantum Analytics User Aids

- [All Activities Reports Descriptions in Quantum Analytics](#) PDF
- [Drill Down Enhancements for Award Detail and Budget to Actuals Reporting](#) PDF
- [eUMB Chartstring and Quantum Non-Spon Comparison](#) PDF
- [Excel Tips for Working with an Analytics Export](#) PDF
- [Export Features and Tips](#) PDF
- [How to Change the Default Report Time Setting](#) PDF
- [How To Remove Saved Customizations in Quantum Analytics](#) PDF
- [Payroll Report Descriptions in Quantum Analytics](#) PDF
- [QF Pocket Guide](#) PDF
- [Sponsored Management Report Descriptions in Quantum Analytics](#) PDF
- [Transaction Details Union Actuals Report Cheat Sheet](#) XLSX **UPDATED**
- [Transaction Details Union Encumbrance Report Cheat Sheet](#) XLSX **NEW**
- [Transaction Type Definitions for Transaction Union Details Report](#) PDF
- [What Are My POs and PRs on Awards and SOAPFs - The R50 Report](#) PDF **NEW**
- [What Reports are in Quantum Analytics](#) PDF
- [Where to find Other Revenue and Closeout Information on an Award](#) PDF

WebEx Recordings for Move To Prompts

To review the Move to Prompts technique:

- Minute 31:40 in the [Transaction Details Union Encumbrance Workshop \(3/4/21\)](#) WebEx recording
- Minute 30:09 in the [What Are My POs and PRs on an Award or SOAPF? - May 2021](#) WebEx recording

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Quantum Webex Seminars

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Quantum Webex Seminars

Quantum Analytics

- [What Are My POs and PRs on an Award or SOAPF? - May 2021](#) **NEW**
- [Using the Search Report in Sponsored Management - April 2021](#) **NEW**
- [Transaction Details Union Encumbrance Workshop \(3/4/21\)](#)
- [Drill Through vs. Drill Down in All Activities Report Jan 2021](#)
- [Drill Through vs. Drill Down in Sponsored Reports Jan 2021](#)
- [Analytics Showcase Jan 2021 CVD Monthly PI Reporting](#)
- [Create Customized PI & Dept Grant Reports Workshop - September 29, 2020](#)
- [Advanced Drill Down Technique Workshop - July 15, 2020](#)
- [Budget to Actuals Detail Encumbrances - July 9, 2020](#)
- [Downloads Management Dashboard Reports Workshop - April 10, 2020](#)
- [Payroll Management Dashboard Reports Workshop - April 8, 2020](#)
- [All Activities Management Dashboard Reports Workshop - April 7, 2020](#)
- [Sponsored Management Dashboard Reports Workshop - April 2, 2020](#)
- [Excel and Printing Tips Workshop - March 31, 2020](#)
- [Transaction Details Union Report Webinar - March 17, 2020](#)
This session starts at the 2:11 mark.

Resources

Quantum Help Desk email
submissions to:
help@umaryland.edu

Code Definitions

- ✓ [OSAOPFUFU \(Segment\) Names and Definitions](#)
- ✓ [Source \(Fund\) Values, Descriptions and Definitions](#)
- ✓ [Function Values, Descriptions and Definitions](#)
- ✓ [Object \(Acct\) Expense Accounts list](#)
- ✓ [Object \(Acct\) Revenue Accounts list](#)
- ✓ [Balance Sheet Accounts](#)
- ✓ Departments (Org) Definitions – use  in Campus Reports in Quantum Financials (log in and select Campus Reports icon)

Quantum Non-Sponsored Accounting String

(Former eUMB Chartstring)

SOAPF = eUMB PROJECT ID

O	S	O	A	P	F	U	F	I
Object (Acct)	Source (Fund)	Organization (Owner Dept)	Activity <i>NEW</i>	Purpose <i>NEW</i>	Function (Program)	Unit (GLBU)	Future <i>TBD</i>	Interfund (<i>Crossing Funds</i>)
XXXX	XXX	XXXXXXXXX	XXXXXX	XXXXXXXXX	XXX	XX	XXXXX	XXX

Questions





QUANTUM
ANALYTICS

תודה
Dankie Gracias شكراً
Спасибо
Köszönjük
Grazie Dziękujemy
Merci Takk
Terima kasih
Dekojame
Vielen Dank Paldies
Dakujeme
Kiitos Täname teid 谢谢
Thank You Tak
感謝您 Obrigado Teşekkür Ederiz
Σας Ευχαριστούμ 감사합니다
Bedankt Děkujeme vám
ありがとうございます
Tack