A leap forward. Transforming systems. Empowering People!

Change Champions

June 27, 2019
Agenda

- Project Timeline – What’s Next
- Roles
- Training
- Business Process Sessions
- Questions
Project Timeline – What’s Next

- Just finished SIT – some SMEs were involved
- User Acceptance Testing
  - Planning now
  - Testing will be late July – early Sep
  - More users will be involved – Project Team Leads will reach out
- Roles and Training
- Conversion/Cutover planning – Sep will close early in eUMB; could be down 10 – 14 days; Instructions will come out to help with planning
- Go-Live – Oct 2nd
Roles

- All roles were tested in SIT
- Plan for assigning roles to users
- Anticipated schedule
- Online security authorization form
- Roles and descriptions
# Role Information – A Sample

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Description</th>
<th>Replaces this eUMB Financials Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procurement Requester</td>
<td>Has rights to</td>
<td>Requisitioner Receiver</td>
</tr>
<tr>
<td></td>
<td>• Initiate, submit, edit and cancel requisitions created on behalf of self</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Receive goods/services for anyone</td>
<td></td>
</tr>
<tr>
<td>Procurement Preparer</td>
<td>Has rights to</td>
<td>Requisitioner Receiver</td>
</tr>
<tr>
<td></td>
<td>• Initiate, submit, edit and cancel requisitions created on behalf of self or others</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Receive goods/services for anyone</td>
<td></td>
</tr>
<tr>
<td>Requisition Approver (managed through workflow)</td>
<td>Approves requisitions expensed to the department(s) the user has identified on role request form</td>
<td>Dept Approver</td>
</tr>
</tbody>
</table>
Training for Departmental End Users

- Go Live training: mid-August through mid-November
- Building plans to provide system training for 1500-2000 users
- Developing 12 courses related to Quantum roles, most required
- Pre-requisites:
  - Chart of Accounts Overview
  - Introduction to Quantum Financials
- Goal: Offer training in multiple formats (instructor-led, Webex, self-paced)
- Check the Elm/Elm Weekly and Quantum website in mid-July for details
Training for Departmental End Users

Overview of Quantum Chart of Accounts
Introduction to Quantum Financials
Creating & Approving Requisitions/Receiving Orders
Reallocating Procurement Card Transactions
Using Debit Memos for Accounting Transfers
Using NONPO Invoices for Check Requests
Creating Customer Billing
Viewing Your Area’s Fixed Assets
Viewing Grants & Using Oracle Social Network to Initiate events
Using Quantum Planning & Budgeting
Using Quantum Analytics (no training requirement)
Changes to Commitment Accounting Pages in eUMB HRMS
Business Process Sessions

- To expose users to business process changes and new terminology
- Chart of Accounts – prerequisite for training - 4 sessions in June
  500 attended – July sessions coming
- Purchasing and Paying for Goods and Services – July 2\textsuperscript{nd} 10 am - 12 pm SON 130 [Register](#)
- PCard - July 9\textsuperscript{th} 10 am – 12 pm PH N103 - Repeat of 4/18 session
- Resources added to [Quantum website](#)