

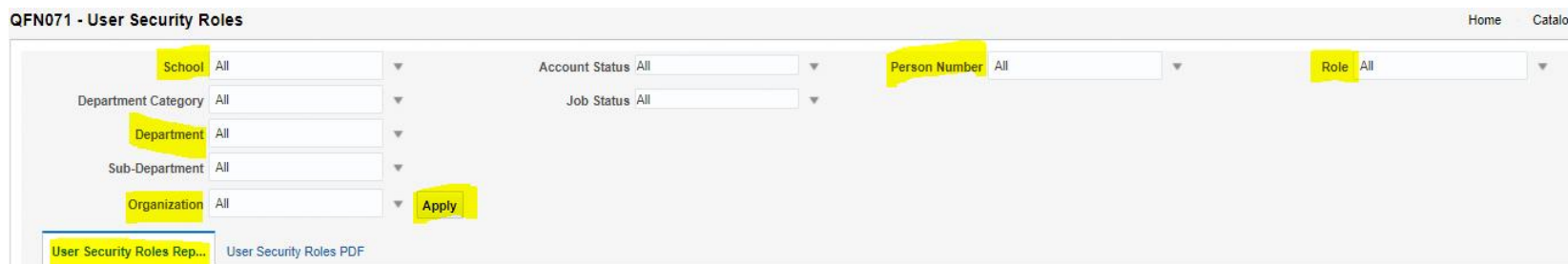
University of Maryland, Baltimore
Quantum Financials – Running the QFN071 User Security Roles Report

The QFN071 User Security Report should be used to identify the Quantum Financials roles held by employees and affiliates. It can be run at any time, but should be run whenever employees or affiliates terminate or change jobs to help ensure roles are properly removed. It must be run at least annually as part of the role validation required by USM IT Security Standards. The User Security Roles PDF report option should be used for the annual role validation. Role validation instructions can be found [here](#).

1. Open **Quantum Financials**.
2. Navigate to **Campus Reports > QFN071 User Security Roles**



3. The report can be run based on the selection from several prompts. Commonly used selections include School, Department, Organization, Person Number, and Role. One or multiple values can be entered in each prompt. The default for each prompt is “All” and if not changed, will return otherwise unfiltered results. Once selections are made, click Apply to run the report.

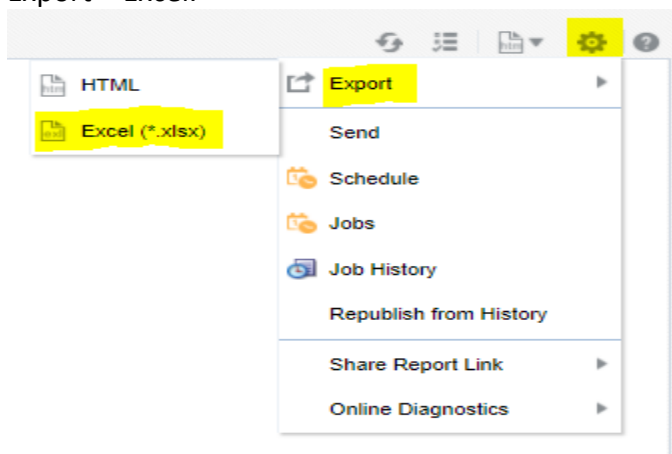
The screenshot shows the 'QFN071 - User Security Roles' report interface. At the top right are 'Home' and 'Catalog' links. Below are several filter prompts: 'School' (All), 'Account Status' (All), 'Person Number' (All), and 'Role' (All). Below these are 'Department Category' (All), 'Job Status' (All), 'Department' (All), 'Sub-Department' (All), and 'Organization' (All). An 'Apply' button is highlighted in yellow. At the bottom left, there is a 'User Security Roles Rep...' button and a 'User Security Roles PDF' link.

Some examples for running the report:

- If you want your results to show all employees in a Department – Search for and select the Department name and leave all other prompts as All. Click Apply.
- If you want your results to show all employees in multiple Organizations – Search for and select the Org numbers and leave all other prompts as All. Click Apply.

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- If you want your results to show all assigned roles for an individual employee – Search for and select the employee’s EMPL ID # and leave all other prompts as All. Click Apply.
4. To download the report results to Excel for further evaluation, select the **Gear icon** at the top right side of the navigation area and select Export > Excel.



5. Open the Excel download and Enable Editing. The report contains the following headers:

Account Status	Job Status	Worker Type	Person Number	Name	Job	Department	Role Name	Pcard Expense Approver(Y/N)	Security Context	Security Context Value
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- Account Status – User account status- Active or Inactive
- Job Status - Active or Inactive in UMB HRMS
- Worker Type - Employee
- Person Number - Employee ID#
- Name – Employee
- Job – Job title
- Department – Department ID/ORG primary to employee
- Role Name – name of assigned role
- PCard Approver – (Y/N) if employee is or is not a PCard Approver
- Security Context – security context type assigned to role (e.g., Business Unit, Reference Data Set)
- Security Context Value – description of assigned security context (e.g., UMB, PO, NONPO, SPON)