



September 21, 2022

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Quantum Financials Notes

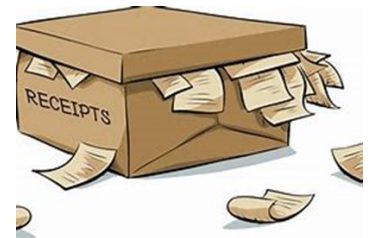
PO Encumbrances Across Fiscal Years

The Quantum Team recently rolled out new functionality that allows users to submit requisitions for POs covering multiple fiscal years with the encumbrances reflected in the appropriate years. If you submit a requisition that covers multiple years - such as a copier lease or software license - and you include all years on a single requisition, the encumbrance for the current year will be booked into the current year and the encumbrance for future years will be booked into future years - resulting in more accurate financial reporting and encumbrance balances across Quantum Financials and Quantum Analytics. In the event of any changes a change order can be created to update the future lines for easy correction. The UPK tutorial [Creating a Multi-Year Requisition](#) is available to help you with this new functionality.



Attaching Supporting Documentation to an Approved PCard Expense Report

You can now attach additional supporting documents to an already approved PCard expense report. Previously, all attachments had to be included **BEFORE** your approver approved. With the August 2022 Quantum Financials upgrade, cardholders and delegates now have the ability to add attachments to already approved PCard expense reports at either the header or line level. More details on how to use this new feature can be found in the UPK tutorial [Adding Attachments After Submitting a PCard Expense Report for Approval](#).



Expense Report: EXP00[REDACTED]

Purpose: test

Attachments: None

Status: Ready for payment

Cardholder: [REDACTED]

Approver name: [REDACTED]

Report Total: 32.85 USD

Employer Pays You: 0.00 USD

Employer Pays Card Issuer: 32.85 USD

Date	Type	Amount	Merchant	Location	Description	Attachments
07/11/2022	3915-Books/Periodicals	32.85 USD Card	AMZN MKTP US'SDQJF3E23			Add attachment

Quantum Financials Upgrade

Quantum Financials absorbed the most recent quarterly upgrade in August. A new feature that became available with that upgrade was the ability to attach supporting documentation to an approved PCard expense report, highlighted above. As with all upgrades, if you see something that looks inaccurate when using the system, please send that information, with a screen shot, to help@umaryland.edu so that it can be investigated.

Find prior issues of Quantum Bytes [here](#)

Making Payments to Research Study Participants

The Office of the Controller (OOTC) – Disbursements, recently held training sessions to explain a new [addendum](#) to their Standard Operating Procedure for Research Study Participant Payments. This new information is important because it affects whether the State will replenish UMB's working fund balance, which impacts on our ability to continue paying any research study participants.

Departments that obtain working fund checks with the intention to cash the check to pay study participants should be aware that there is now a 60-day time limit for full distribution of the total funds received. A completed cash log must be provided to prove that all funds were either paid out or returned within that period. Beginning October 1, 2022, a department revolving SOAPF will be charged for any checks that remain outstanding for 90 days. A recording from the training sessions and the presentation slides will be available soon on the OOTC-Disbursements [website](#). Look for more details about this important topic in our next issue.



eUMB Financials and Raven Applications Are Now Retired

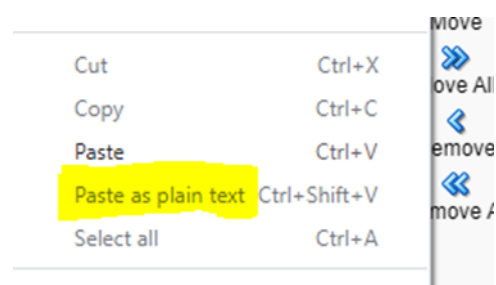
Effective 9/1/22, the eUMB Financials and Raven applications are officially retired and campus users are no longer able to access the applications. The related UPK tutorials and User Authorization forms have also been removed. Those applications served the campus well for many years, but with Quantum Financials and Analytics entering the third year of operation, there was no need to keep them up and running. Parting is such sweet sorrow...



Quick QF Tip

When copying and pasting data from a word or pdf document into any free form text fields on Quantum Financials screens, remember to **paste the data as plain/unformatted text**. One approach is to paste the data into notepad or text editor and remove any special (“, &, *, ~) or new line characters. Then copy the data from notepad to the intended text field in Quantum Financials.

Side Note: Depending upon the browser used, your right click paste options may have different descriptions.



The Importance of the Procurement Receiver Role

Make sure you have the Procurement Receiver role to easily search for and receive on Purchase Orders. Frequent help requests occur when someone is trying to receive on a purchase order (PO) by searching on the requisition 'Entered By' field but cannot find the PO they're looking for because someone else may have subsequently edited the requisition. Buyers will often make edits when they are processing requisitions, in an effort to more efficiently source the requisition to a PO.

The more reliable way to search, once you have the Procurement Receiver role, is to just complete the PO number search field and set the 'Items Received' value to 'Any Time.' If you choose to complete additional search fields, the searches could fail because one or more of the field values may be incorrect.

You can check on which roles you have with the User Security Roles report under the Reports icon in Quantum Financials. If needed, you can request the Procurement Receiver role by submitting the [Quantum Financials User Authorization Form](#).





Project Updates

UMB is in the process of implementing new systems to replace our aging Travel and HR systems. Follow this section of Quantum Bytes for monthly updates on both projects.

SAP Concur Travel and Expense, a fully integrated travel booking and expense application. The implementation team of functional, technical, and department subject matter experts (SMEs) have been hard at work designing and testing the system configurations. The project is on schedule with pilot group access beginning this Fall and wider roll out to all campus users planned for January 2023. The team is excited to share a demo of the system at the next Town Hall on Thursday, October 13 at 10 am. To attend, add the meeting to your calendar and use this [link](#) to join at the appropriate time. Other information on delegates, approvers, setting up access and mandatory training will also be covered.

Quantum HCM, a contemporary, people management and payroll system application. The project team is wrapping up the Discovery phase and working with the Executive Sponsors to decide which modules to be purchased and implemented. The project is on schedule to start the design and implementation phase in early 2023. We will be holding Town Halls and other presentations throughout the project life cycle and developing a website to keep you informed.

Quantum Analytics Notes

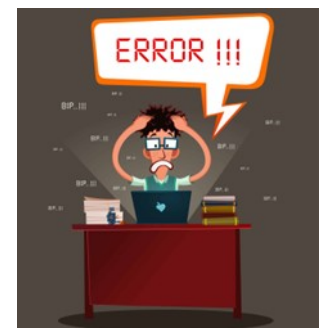
SPP 7062 Activity Report Improvement

The Quantum Analytics support team will be rolling out an improvement to the SPP 7062 Activity Report this week. This report, available under the Sponsored Management dashboard, is used by departments requesting working fund checks for research study participant payments (SPP) to support that previous checks have been disbursed and allocated from Object 7062 to Object 3125. Certain transactions have been missing from the report, causing inaccurate balances, especially when funds that were no longer needed were deposited back to the award. Those adjustments will now be properly reflected in the SPP 7062 Activity Report, and the Report will agree with the information available from the Award Detail 7062 radio button. Thank you for your patience as the team worked to improve this complex report.



Data Variances Are Being Addressed

Please be aware that help requests have identified certain data variances between the Transaction Details Union report/drills and the Budget to Actuals Summary and Detail reports that the Quantum support team is currently investigating. When the investigation is complete and a resolution identified, more information will be provided.





Remember, when you email PO_Close@umaryland.edu to request a PO to be closed, use the Subject line “Close PO#XXXXXXXX” and provide the **PO# and Supplier name** in the body of the email. This additional information helps SSAS ensure they are closing the proper PO. If you are sending multiple POs in one email, use in the subject line “Close multiple PO’s” and list each **PO# and Supplier name** in the body of the email. SSAS will send a confirmation email once the POs are closed. **SSAS reminds you to be sure that all receiving, and invoicing has been completed before submitting the request to close the PO.**

Quantum Helpdesk

The Quantum support team asks that while continuing to send your Quantum requests for help to help@umaryland.edu, also include “Quantum Financials” or “Quantum Analytics” in the subject line of the help request email to assist in speeding up the assignment process. The team also asks that you not send the same requests to individual support team members or the Quantum Financials email box, which is not regularly monitored for such requests. Users should note that requests for help with Quantum should only be sent to help@umaryland.edu and not to your School specific helpdesks.



All Things Quantum

Quantum Training

Quantum Financials classes are delivered via WebEx and designed to introduce new users to the application. Current users are welcome to join any class for a refresher. Register either via the [financial calendar](#) or the [training registration database](#) by 5 PM the day before the class to receive an email with instructions for joining your virtual class session. Information on required training for each Quantum Financials role is available on the [Quantum Training and Support page](#). If you need additional information, please email the Quantum Training Team at DL-BFBusinessApplications@umaryland.edu.

Please note that the [Introduction to Quantum Financials](#) class is a prerequisite to all Quantum Financials training classes and is offered monthly. Some Quantum Financials classes may have additional prerequisites. Please look for those requirements when registering via the Financial Calendar and Training Registration Database

Quantum Analytics Coaching Sessions

Quantum Analytics users are invited to schedule 45-minute timeslots on Friday, September 30 for individual or small group coaching on reports of their choosing. Using WebEx, users will share specific reports they would like assistance with, and/or to discover new reports they have not yet tried. The focus will be on *your* topics. To schedule a time slot, please contact Buzz Merrick at bmerrick@umaryland.edu.



Quantum Analytics Lunch ‘N Learn Workshop

On Friday September 23, from noon to 1pm, join the new Quantum Analytics Brown Bag Lunch N Learn Workshop. The topic will be *Excel @ Analytics* including:

- Compare/contrast the three Excel export reports
- Demo Excel’s “Format as Table” feature and options (e.g., “Slicers”)
- Group & Outline
- Simple Pivot techniques & add percentages to a Pivot Table
- Excel Quick Tips

The date for October’s session will be included on the training calendar soon.



Quantum Analytics classes are delivered via WebEx and do not require advance registration. You can access all the sessions using the log-in information below:

<https://umaryland.webex.com/join/bmerrick>

Access code: 730 028 347

To phone in: 415-655-0001

