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[Previous Quantum Bytes Issues](#)

Important Reminders

Using the Helpdesk– A Request from the Quantum Support Team

The Quantum support team asks that you please keep sending your Quantum request for help through the helpdesk at help@umaryland.edu and not to individual support team members or to quantumfinancials@umaryland.edu. The helpdesk system is designed to document, track, and triage any requests for assistance. Each helpdesk email is ticketed and forwarded to the appropriate support team member who can assist the requester. The Team regularly monitors the workflow of open and closed tickets.

Using the helpdesk builds the knowledgebase for responders on the Quantum support team and also enables tracking of issues to be used in training and communications. When requests for help are sent directly to individuals instead, those benefits are lost and often leads to duplication of efforts. The team thanks you for your patience as they work through your requests for help and reminds you to please keep using the helpdesk.

Role Validation Reminder

The annual validation of security roles held in both Quantum Financials and eUMB HRMS is currently underway. Notifications are being sent to Administrative Deans, Department Administrators or Directors with instructions for how to run the reports of security roles, validate the employees and roles, use DocuSign to sign the certification statement, and send the reports to rolevalidation@umaryland.edu. Signed reports are due back by March 19th.

Focus on PCard—Reminders, Suggestions, Notifications

Quantum PCard Bug Notification - Update

Since last month when we first notified you of the PCard bug, which caused account combo distributions entered by reallocators to revert back to the default account combo after review by the approver, the Quantum support team has learned more about the downstream effects the bug caused before it was corrected with last month’s Quantum Financials upgrade. For example, although the bug did not change any project information entered during the reallocation, it also did not allow the expense items to be posted to those projects.

Any expense report that was impacted by the bug has not been fully accounted for and posted to Quantum Analytics because they are stuck in a status of Needs Revalidation in Quantum Financials. If you have an expense report stuck in this status, you received an email from Quantum Financials on 3/5/21 outlining this update.

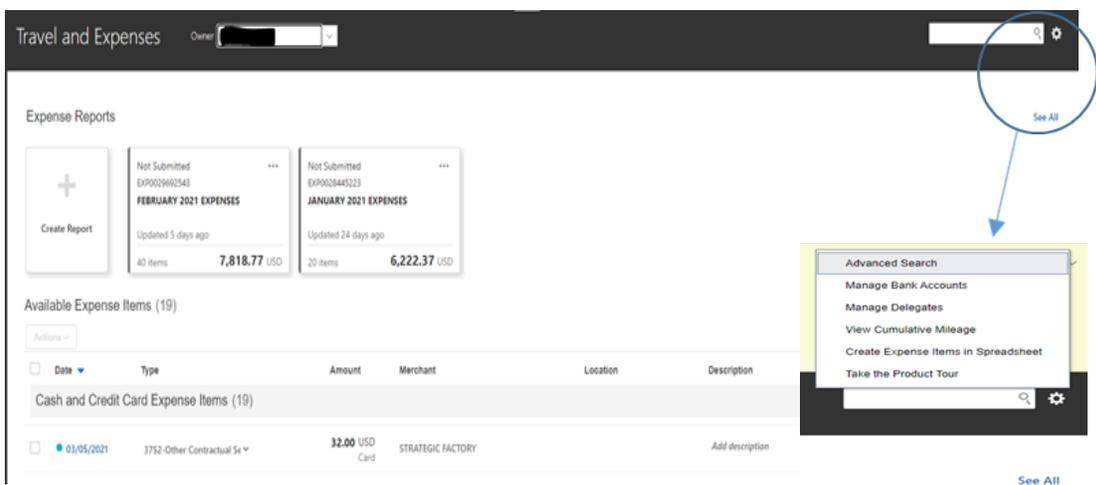
The team is working with Oracle support to identify the steps that must be followed to get these expense reports processed and anticipates the solution will be in place by the end of the month. At this point, we are suggesting you wait until that fix has been executed. However, if you have sponsored projects that are closing and need to get expense items posted before the end of this month, please contact DL-BF Financial Systems DL-BFFinSys@umaryland.edu for assistance.



PCard Reallocation Page Has New Features

There are some new features on the Expense page that should improve how efficiently you are able to complete PCard reallocations. For example, there are multiple ways to create an Expense Report, add attachments, and add a description. This may cut down on the number of clicks or moving between pages. The redesigned Expense Reports landing page includes recently created expense reports across the top of the page. To view expense history, click on the **See All** link or the **Go To Task (Gear icon) > Advanced Search** on the top right of the landing page. (Item 1) You can view the list of Overdue items using a Delivered search or by reversing the Date column order to bring the older items to the top of the list. You will continue to see other common features like Withdraw, Remove Items, Delete Expense Report, and View Expense Report History.

Item 1



Remember Clear Cache Often

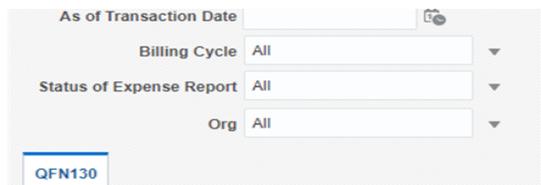
This is especially important after upgrades and patches so that you access the most up-to-date page versions.

Best practice suggestion is to clear your browser cache every day as part of signing into Quantum.



PCard Transaction Report Reminder

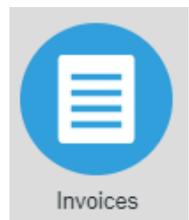
The PCard Transaction report is available under the Campus Reports Icon in Quantum Financials. The QFN#130 is a versatile tool that can be used by cardholders, authorized reviewers, reallocation delegates, and department administrators to manage PCard responsibilities. The QFN#130 PCard Transaction report will give you the status of your expense items. You can search by Status of Expense Report for items: Approved, Rejected, Paid, Saved, Not created. A best practice suggestion is to run the report at least monthly.



Quantum Financials Notes

Searching for Invoices and Saving Searches

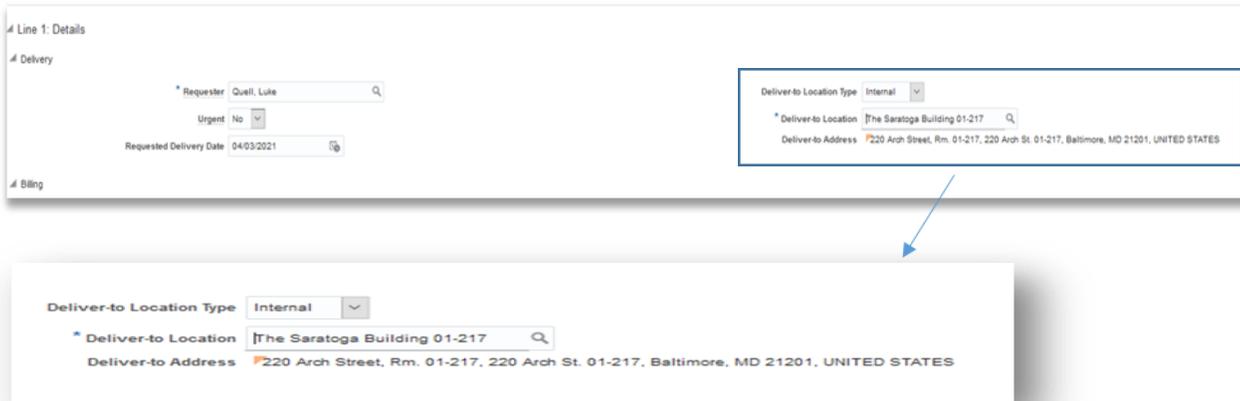
In Quantum Financials, you can search for your Debit Memos and NONPO Invoices and save the search criteria to use again later using the Invoices icon. Creating a saved search can help reduce time spent looking for “your” items. Check out this [user aids](#) for recommended search criteria, additional fields, and steps for how to save and name your searches.



Changes for Requisitions “Deliver - to Location”

For those who create requisitions, you will notice as of 3/19/21 that the “Deliver-to Location” display names have changed. The “Deliver-to Location” display name is what you see when you are searching for a delivery address when creating a requisition. The current locations display as the street address of the delivery location followed by a room number. To make it easier for users to find locations in the list, the “Deliver-to Location” display name will now reflect the building name and room number. The full Deliver-to Address information for the location, which is sent to suppliers for shipping purposes, will remain the same. **Example:** Prior to the change, Deliver-to Location display name was “220 Arch Street Rm. 01-217”. (Item 1) After the change, the Deliver-To Location display name will be “The Saratoga Building 01-217”. (Item 2) The full address information will remain the same – “220 Arch Street, Rm 01-217, Baltimore, MD 21201, UNITED STATES.”

Item 2



Quantum Analytics Notes

Transaction Details Union Report with Encumbrances (QA7.P9.R05)

Transaction Details Union with Encumbrance Reporting is available under the Downloads Management dashboard as of March 1st. If you are drilling from Sponsored Management or All Activities, it will take you to the same new Transaction Union Encumbrance view. The new enhancements include encumbrance reporting on Actuals, Encumbrances, or Both. Encumbrance reporting includes Payroll, Requisitions, Purchase Orders and the Burden (F&A) calculation on Requisitions and Purchase Orders. These transaction types can be found by using the Transaction Type filter to retrieve the encumbrances data. A new search filter has been added to search for PO information. Populate the **Reference** filter using the PO# to retrieve the full history of a Purchase Order.

QA9.P1.X01

* Amount Type Actuals Encumbrance Both

Fiscal Year 2021

* Encumbrance As of <= MAR-21

Accounting Date Between

* Transaction Type ENC - Requisition - Burden;E

Document Number (All Column Values)

Reference 1000002970

Award Number - Name --Select Value--

Project Number - Name (All Column Values)

Transaction Details Report for Encumbrances (QA7.P9.R05)

Run by: Mary Gallico
Time run: 3/10/2021 2:52:58 PM

Transaction Type	Document Number	Amount	Amount Type	Reference	Original Transaction Reference
R21-01 - Purchase Requisition Approved	1000006748	\$8,640.00	Encumbrance	1000002970	APPROVED
R23-10 - Purchase Requisition Converted to PO	1000006748	(\$8,640.00)	Encumbrance	1000002970	CLOSED
R25-12 - Purchase Order Approved	1000002970	\$8,640.00	Encumbrance	1000002970	CLOSED
R26-20 - PO Invoiced Amount	1000002970	(\$8,640.00)	Encumbrance	1000002970	CLOSED
Grand Total		\$0.00			

Quantum Training Schedule

Quantum Financials classes are designed to introduce new users to the application, but current users are welcome to join any class for a refresher. The Quantum Training Team delivers classes over WebEx and has selected course content which can be delivered in 3 hours or less, including time for your questions. Register by 5 PM the day before the class to receive an email with instructions for joining your virtual class session. You can register either via the [financial calendar](#) or the [training registration database](#).

The March/April **Quantum Financials** training classes include:

Quantum Financials Course Name	Date/Time
Intro to Quantum Financials	Mon, Mar 29 – 9:30 AM – 11:30 AM
Creating Customer Billing & Recording Disputes	Mon, Mar 29 – 1:00 PM – 4:00 PM
Using Debit Memos for Accounting Transfers	Tue, Mar 30 – 1:00 PM – 4:00 PM
Searching for NONPO Suppliers	Wed, Mar 31 – 1:30 PM – 3:30 PM
Using NONPO Invoices for Check Requests	Thu, Apr 1 – 9:00 AM – 12:00 PM
Reallocating & Approving Procurement Card Transactions	Tue, Apr 6 – 9:30 AM – 12:00 PM
Creating & Approving Requisitions	Wed, Apr 7 – 1:00 PM – 4:00 PM
Receiving Orders	Thu, Apr 8 – 11:00 AM – 12:00 PM

Note: Searching for NONPO Suppliers is now a separate class and a pre-requisite for Using NONPO Invoices for Check Requests

Quantum Analytics classes do not require advance registration. You can access all of the sessions using this log-in information:

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

Access code: 730 028 347

To phone in: 415-655-0001

The March/April **Quantum Analytics** classes include:

Quantum Analytics Course Name	Date/Time
All Activities Dashboard Intro	Tue, Mar 23 – 9:00 AM – 11:00 AM
Sponsored Management Dashboard Intro	Wed, Mar 24 – 9:00 AM – 11:00 AM
Payroll Management Dashboard Intro	Wed, Apr 14 – 9:00 AM – 11:00 AM
Sponsored Management Dashboard Intro	Thu, Apr 15 – 9:00 AM – 11:00 AM
All Activities Dashboard Intro	Tue, Apr 20 – 9:00 AM – 11:00 AM

Information on required training for each Quantum Financials role is available on the [Quantum Training and Support page](#). If you need additional information on Quantum training, please email the Quantum Training Team at [DL-BF Financial Systems](#). We're looking forward to seeing you soon!

Are you ready to share what you like about Quantum Analytics and which reports help you get your work done? The Quantum Training Team is always looking for new Analytics Showcase topics and presenters. Reach out to Buzz with your contact information at [DL-BF Financial Systems](#).

