



September 15, 2021

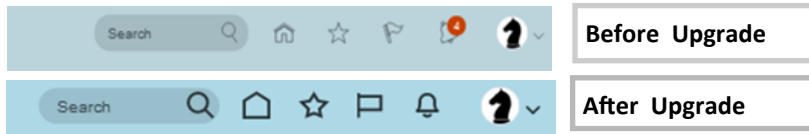


Volume 21, Issue 1



Quantum Financials Upgrade

The most recent quarterly upgrade to Quantum Financials was completed on August 20 and there were no significant changes to the end user experience. The look of the Global Header icons changed slightly, but the functionality is the same. Those icons are found at the top right corner of the Quantum Financials home page, next to the Search bar.



For the best experience and to access the most up-to-date version of the system, users are reminded to [clear your browser cache](#) before logging in to Quantum Financials.

Internet Explorer (IE) is no longer an Oracle supported browser and should not be used to access any of the Quantum applications. Those who have continued to use IE have reported that certain fields are missing from their Quantum Financials pages.



Browsers that are supported and should be used with Quantum include Google Chrome, Mozilla Firefox, Microsoft Edge, or Apple Safari. Be sure you are working from the most up-to-date version of whichever browser you choose.

As with all upgrades, you may notice some differences as you navigate through the system. If you notice something that looks unusual or inaccurate, please send that information with a screen shot to help@umaryland.edu so the support team can investigate.

Quantum Financials Notes

NONPO Invoice Documentation

Tango Funds for Study Participant Payments

When submitting NONPO invoices, remember to attach the required supporting documentation for each transaction type. Requests for Tango funds to pay study participants require the following in PDF format:

- Quantum Financials Invoice Header screen print along with the Tango Invoice
- Grant/Award verification that payments to study participants is allowable
- Quantum Analytics 7062 report showing the check and the debit memos to 3125
- PI Authorization form from AP website—completed and signed
- Research consent form – completed and signed

Documentation should be sent to fs-workingfund@umaryland.edu using SecureXfer only after departmental approval of the NONPO invoice. The subject line of the SecureXfer email should contain information such as, Invoice #12345 Tango Supporting Documentation. A helpful UPK tutorial can be found at [Creating a NONPO Check Request for Tango Gift Cards](#).

Quick Tip

If your supporting documentation is a jpg picture which is too large, you can reduce the file size by opening the picture and right-clicking to select Resize. You will be given a Resize the Image option box that includes Small, Medium, Large, and Custom options. By selecting Small, the image will be dramatically reduced.

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[Previous Quantum Bytes Issues](#)



Remember

PO Close email

The PO Close email PO_Close@umaryland.edu was created to streamline requests to close Purchase Orders. When you require a PO to be closed, please follow the SSAS guidelines: send an email to the PO Close email address and use the Subject line "Close PO#XXXXXXXX". In the body of the email provide the PO# and Supplier name. If you are sending multiple PO's 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 PO's are closed.

Don't Default Customizations

Saving customizations in Quantum Analytics can be a time saver, but remember the best practice suggestions is to NOT set them up as a default. See the July 2020 [issue](#) of Quantum Bytes for more information about why.

Procedures for Entering Receipts and the Delayed Invoice Payment Rate

Entering Receipts into Quantum Financials recognizes that the goods or services from an executed Purchase Order (PO) have been obtained, are in good condition, and complete the terms of the procurement. Once the Invoice is received by the Office of the Controller - Disbursements, the three-way match will be complete and the Invoice paid. This could occur for full or partial payment of a PO, but Invoices cannot be paid until the related Receipt is entered. A helpful UPK tutorial can be found at [Searching for a Purchase Order & Creating the Receipt](#).

Failure to enter a Receipt will delay UMB's payment to the Supplier and will cause UMB's delayed invoice payment rate to increase. State law requires invoices to be paid within 30 days and State regulations consider invoices to be delayed when they are sent to the General Accounting Division (GAD) for payment more than 25 days after the date of receipt of the invoice or the goods/services. Please ensure Receipts are entered in a timely manner to avoid increasing the delayed invoice payment rate, which GAD monitors and reports on noncompliance.

Quantum Analytics Notes

The following workshops are now open for registration!

WebEx Seminars, User Aids, and Workshops

Tips, Tricks & Troubleshooting

This workshop is focused on providing Analytics users an array of user-friendly tips, tricks, and techniques that will save you time and effort! Including shortcuts, using report Views and filters drilling on columns, and hyperlinks. This workshop will also delve into troubleshooting techniques that will help you select, design, and leverage your Analytic reports with greater understanding.

Actuals & Encumbrances in Transaction Detail Union Reports

This workshop introduces you to the broad range of reporting available in the Transaction Details Union reports and the User Aid "Cheat Sheets" designed to speed your reporting. Learn how to run, save, and export transaction detail reports for Actuals, Encumbrances, and/or both, providing a greater understanding of the columns of data that appear in each report.

Update to Employee Details report in Quantum Analytics

Quantum Analytics Payroll Management Dashboard report, Employee Detail – QA5.P5 is used to analyze payroll charges for an individual employee across all their funding sources. This report has been updated to include additional data columns to choose from. These newly created columns provide departmental users more detailed information to review, analyze and act on payroll issues.

Users will be able to view payroll data by Billing Basis, Project Start and End Dates, Sponsor Award # & Name, and Quantum Award Name. Right click on the column "Full Name", select Include Column, and the drop-down box provides the data choices available.

How is a particular employee's salary being paid? (QA5.P5.R1)
 Time run: 8/7/2021 12:16:24 PM
 Employee Number: 001978
 Employee Name: Reeves,Gloria

Posted Pay Period: Salary 5

Employee ID	Full Name	Code - Description	Sponsor/Non-Sponsor	SOAPP Code	Project Number	PI ID - Name	Project Name	Pay Period Posted	Funding Source
001978	Reeves, Gloria	Faculty 12 Month	Sponsored		10023676	005198-Love, Raymond	FY 21 Peer Review Progra		External
					30004221	000860-Kelly,Deanna	A Randomized Controlled Trial of a Telemonitoring Program, Project ECHO, to increase Clozapine Prescribing		External
					30006942	030717-Chang, Linda	2/21 ABCD-USA CONSORTIUM: RESEARCH PROJECT SITE AT UMB - 2		Over The Cap
					30008172	001978-Reeves,Gloria	Clinical high Risk in Psychosis CHR-P YR2		Over The Cap
					3000561C3		Child EBP, Outreach & Education and Strive for Wellness Clinic		External
					30004221	000860-Kelly,Deanna	A Randomized Controlled Trial of a Telemonitoring Program, Project ECHO, to increase Clozapine Prescribing		External
					30006942	030717-Chang, Linda	2/21 ABCD-USA CONSORTIUM: RESEARCH PROJECT SITE AT UMB - 2		Over The Cap
					30008172	001978-Reeves,Gloria	Clinical high Risk in Psychosis CHR-P YR2		Over The Cap
Grand Total									

Refresh - Print - Export

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 **September Quantum Financials** training classes include:

Quantum Financials Course Name	Date/Time
Introduction to Quantum Financials	Mon, September 20 – 10:30 AM – 12:00 PM
Searching for NONPO Suppliers	Mon, September 20 – 1:30 PM – 3:00 PM
Using NONPO Invoices for Check Requests	Tue, September 21 – 9:00 AM – 12:00 PM
Reallocating & Approving Procurement Card Transactions	Tue, September 21 – 1:30 PM – 4:00 PM
Using Debit Memos for Accounting Transfers	Wed, September 22 – 9:00 AM – 12:00 PM
Creating & Approving Requisitions	Wed, September 22 – 1:00 PM – 4:00 PM
Receiving Orders	Thu, September 23 – 10:00 AM – 11:00 AM
Creating Customer Billing	Thu, September 23 – 1:00 PM – 4:00 PM

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

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!

The **September/October Quantum Analytics** classes include:

Quantum Analytics Course Name	Date/Time
Sponsored Management Dashboard Intro	Tue, September 14 – 9:00 AM – 11:00 AM
Payroll Management Dashboard Intro	Wed, September 15 – 9:00 AM – 11:00 AM
All Activities Dashboard Intro	Thu, September 16 - 9:00 AM – 11:00 AM
Actuals & Encumbrances in Transaction Detail Union Reports	Fri, September 17 - 9:00 AM – 10:30 AM
Actuals & Encumbrances in Transaction Detail Union Reports	Tue, September 28 - 2:00 PM – 3:30 PM
Tips, Tricks, & Troubleshooting in Quantum Analytics	Wed, September 29 - 2:00 PM – 3:30 PM
Tips, Tricks, & Troubleshooting in Quantum Analytics	Thu, September 30 - 9:00 AM – 10:30 AM
All Activities Dashboard Intro	Tue, October 12 – 9:00 AM – 11:00 AM
Payroll Management Dashboard Intro	Wed, October 13 – 9:00 AM – 11:00 AM
Sponsored Management Dashboard Intro	Thu, October 14 – 9:00 AM – 11:00 AM

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

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

Access code: 730 028 347 To phone in: 415-655-0001

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](#).

