



February 16, 2022

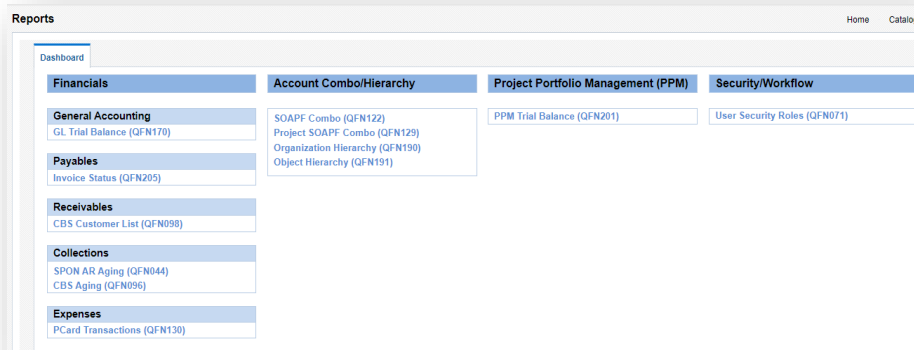
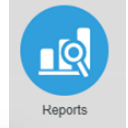


Volume 26, Issue 1

Quantum Financials Notes

Quantum Financials Campus Reports

All Quantum Financials users were notified about the change made to the Campus Reports icon on February 4. As a reminder, the icon name was changed to **Reports** and when selected, the following dashboard appears.

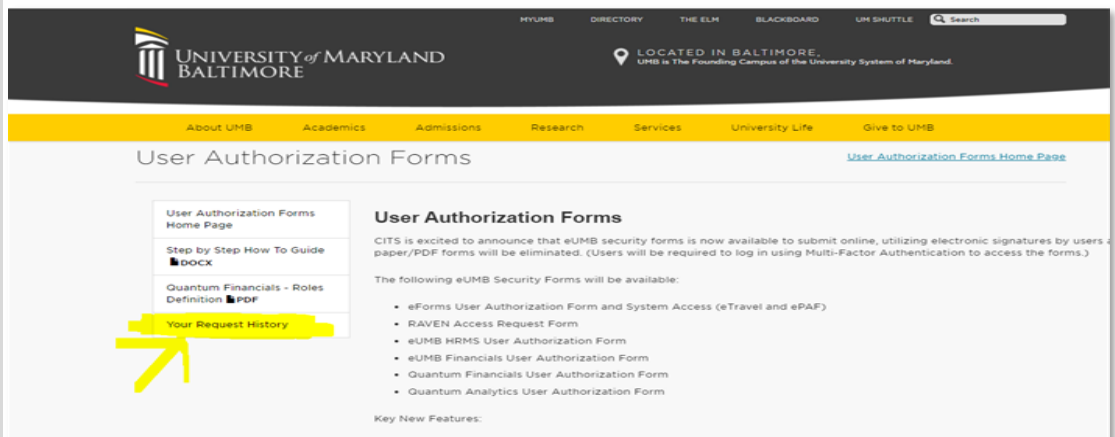


The QFN report numbers will be reflected at the end of the report name on the dashboard page for now, but will be removed in the future. Users should take this opportunity to familiarize themselves with the report names and not just the QFN numbers. UPK tutorials have been updated to reflect the new format. References to the old Campus Reports format in other user aids may be updated as needed.

Annual Role Validation

The annual validation of security roles held in both Quantum Financials and eUMB HRMS is currently underway. **Please note that the signed reports are due back by February 28, 2022.** Any questions about the instructions or where to send completed reports should be sent to rolevalidation@umaryland.edu.

For those who are submitting updated User Authorization Forms to complete the validation, the "Your Request History" link, available on the left menu of the User Authorization Forms home page, will allow users to track the status of forms they submitted for themselves or as a proxy for someone else, as well as forms they approved.



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

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 between the PO, Receipt, and Invoice 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. Currently, UMB has the highest delayed invoice payment rate in the USM. A best business practice that would help bring our delay rate down would be to enter a Receipt as soon as goods/services are rendered and not to wait until the Invoice is received. Remember that there is no longer a threshold for Invoices requiring a Receipt. Receipts must be entered for all Invoices to be paid regardless of the Invoice amount.

Quantum Analytics Notes

Project Profile Card in Award Detail Report

We have identified an issue in Quantum Analytics that causes the Award Profile Card (QA4.P4 – Award Detail) to not display the Award Profile Card details. It looks like the screenshot below.

Award Profile Card

Award Number: 3000525
Award Name: Microenvironmental Regulation of Alternative Splicing Patterns Drive Aggressive GBM Biology

No data fits the combination of dashboard prompts you have selected. Please check your criteria and try again. Refresh

Owning School: C1000000~School Of Medicine
Owning Department: E1041400~Pathology
Owning Org: 10414050~Pathology Research
CFDA Number: 93,853
Allocated Funding Amount: \$343,131.16
Direct Funding Amount: \$222,091.37
Indirect Funding Amount: \$121,039.79

No data fits the combination of dashboard prompts you have selected. Please check your criteria and try again. Refresh

Institute Proposal Number: 20062995
Institute Proposal Development Number: 49474
Institute Proposal Title: Microenvironmental Regulation of Alternative Splicing Patterns Drive Aggressive GBM Biology

If you see this please contact your SPAC representative. They will be able to update the award information in Quantum Financials and that will correct the issue in Quantum Analytics.

Receipt Dates for Accounts Receivables Payments in Quantum Analytics Transaction Details Downloads

* Transaction Type (All Column Values)

Document Number
Reference
Award Number - Name
Project Number- Name

- Receivables Manual Journals
- Capital Projects
- Miscellaneous Receipt
- Conversion
- Payroll
- PO Invoice / AP Travel

Search...

Quantum Analytics Transaction Details Union Report includes a new enhancement that allows users to search for Miscellaneous Receipt information including the “Receipt Date” and “Created by Name.” Users should select the transaction type “Miscellaneous Receipt” when completing the search criteria. Results will include the name of who created the Receipt as Attribute 2 and the Receipt Date as Attribute 3. These two attributes were added for all Miscellaneous Receipt transactions to easily identify when and by whom, revenue was moved to an account or applied to a bill.



Remember

Clear Cache

This is especially important after quarterly upgrades and patches so that you can access the most up-to-date version of Quantum. The best practice suggestion is to clear your browser cache every day as part of signing into Quantum. Instructions can be found [here](#).

Quantum Help Desk

The Quantum support team asks that you please keep sending your Quantum requests for help to help@umaryland.edu and not to individual support team members or the Quantum Financials email box, which is not regularly monitored for such requests. The helpdesk system is designed to document, track, and triage any requests for assistance.

New Quantum Analytics WebEx Seminars and Workshops

Quantum Analytics Coaching Sessions

This workshop offers 45-minute timeslots for individual or small group Quantum Analytics users to receive coaching and instruction on reports of their choosing. Using WebEx, users will share their screen to work on specific reports with which they would like assistance, and/or to discover new reports they have not yet tried. The focus will be on topics that users bring to the session. To schedule a time slot, please contact Buzz Merrick at bmerrick@umaryland.edu

Quantum Analytics Case Studies Workshop

Case Studies are stories used as teaching tools to show how a theory or concept applies to real situations. Beginning in January 2022, the Quantum Analytics Team began providing topic-specific Case Studies workshops on how Quantum Analytics reporting can be leveraged for specific business areas of our workforce, across multiple Analytics Dashboards. The January and February 2022 workshops are targeted to those who manage budgets with payroll and do payroll reporting in Quantum Analytics.

Important Reminders

Upgrade to Quantum Financials

Quantum Financials will absorb an upgrade on the evening of February 18. Users should complete their transactions and refrain from using QF by 10 pm Friday, February 18. The system is expected to be available again by 6 am Saturday, February 19. Any changes to that schedule can be found on the IT Alerts section of the myUMB Portal.

New Email for PCard Communications

SSAS has created a new email for communications regarding the PCard. Please send communications you previously directed to Regina Spencer, to the new email PCard-Admin@umaryland.edu. You can find this information on the SSAS website under the [Corporate Purchasing Card](#) selecting the PCard Administrator hyperlink.

PO Close email Reminder

The PO Close email that SSAS set up to streamline requests to close Purchase Orders has been working well. 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 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. **SSAS reminds you to be sure that all receiving and invoicing has been completed *before* submitting the request to close the PO.**

Clearing Requisitions from Workflow

Regularly clearing unneeded requisitions from your workflow in Quantum Financials is important to the accuracy of your encumbrance balances viewed in Quantum Analytics. Those who enter requisitions may notice there are some in your workflow that are no longer needed. They could have been returned by the Buyer, rejected, or otherwise abandoned. These unused requisitions will artificially inflate encumbrances in the Project commitment records and must be cleared from the workflow list. [Steps](#) for clearing the requisitions can be found on the Quantum website.

Don't Default Customizations

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

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 that 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](#).

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.

The February/March Quantum Financials training classes include:

Quantum Financials Course Name	Date/Time
Using Debit Memos for Accounting Transfers	Thu, Feb 17 -- 9:00 AM – 12:00 PM
Searching for NONPO Suppliers	Tue, Feb 22 – 10:30 AM – 12:00 PM
Using NONPO Invoices for Check Requests	Wed, Feb 23 -- 9:00 AM – 12:00 PM
Creating & Managing Customer Bills (Part 1)	Wed, Feb 23 - 1:30 PM - 3:30 PM
Viewing & Collecting CBS Receivables (Part 2)	Thu, Feb 24 - 10:00 AM - 12:00 PM
UMBF & USMF Billing (Part 3)	Thu, Feb 24 - 1:30 PM - 2:30 PM
Intro to Quantum Financials	Mon, Mar 14 - 1:00 PM – 2:30 PM
Receiving Orders	Tue, Mar 15 - 1:30 PM – 2:30 PM
Creating and Approving Requisitions	Wed, Mar 16 - 9:00 AM – 12:00 PM
Using Debit Memos for Accounting Transfers	Thu, Mar 17 - 9:00 AM – 12:00 PM
Searching for NONPO Suppliers	Mon, Mar 21 - 1:30 PM – 3:00 PM
Using NONPO Invoices as Check Requests	Tue, Mar 22 - 9:00 AM – 12:00 PM
Creating and Managing Customer Bills (Part 1)	Wed, Mar 23 - 10:00 AM – 11:30 AM
Viewing and Collecting CBS Receivables (Part 2)	Wed, Mar 23 - 1:30 PM – 3:30 PM
Reallocating and Approving PCard Transactions	Thu, Mar 24 - 10:00 AM – 12:30 PM
Billing USMF and UMBF Foundations (Part 3)	Fri, Mar 25 - 1:00 PM – 2:00 PM

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 February/March Quantum Analytics training classes include:

Quantum Analytics Course Name	Date/Time
Payroll Case Studies Workshop	Thu, Feb 24 – 2:00 PM – 3:00 PM
Quantum Analytics Coaching Sessions (45 min timeslots)	Fri, Feb 25 – 9:00 AM – 4:00 PM
Sponsored Management Dashboard Intro	Tue, Mar 08 - 9:00 AM – 11:00 AM
All Activities Management Dashboard Intro	Wed, Mar 09 – 9:00 AM – 11:00 AM
Payroll Management Dashboard Intro	Thu, Mar 10 - 9:00 AM – 11:00 AM
Case Studies Workshop	Thu, Mar 24 – 2:00 PM – 3:00 PM
Quantum Analytics Coaching Sessions (45 min timeslots)	Tue, Mar 25 - 9:00 AM – 4:00 PM

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

Quantum Analytics User Aids are training and support learning resources located on the [Quantum Analytics User Aids](#) webpage on the Quantum website. They provide topic related information and include additional resources for Department end users.

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](#).

