Quantum Bytes — an update on all things Quantum

UNIVERSITY of MARYLAND BALTIMORE

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Quantum Financials Notes

Quantum Financials Reports

The Invoice Status Report (QFN205) has new enhancements that include renaming the To/From dates and adding a filter to search by PO Number. The To Date and From Date fields have been re-named 'Creation Date From' and 'Creation Date To' to clarify which date the report is referring to. Creation Date represents the date the invoice was last updated. For that reason, Creation Date may not be the same as the date on which the transaction was originally entered. Search by PO NUMBER will provide the ability to search using a specific PO Number. The PO Number field will be included on the report results. Refer to the UPK Generating the Invoice Status Report: Preparing to Close a Grant for more information.

The SPON Receipt Application Details Report (QFN237) is a Billing & Collections report used for Sponsored Projects that has been added to the Reports Dashboard under the Quantum Financials (QF) Reports icon. This report provides the applied amount of cash deposits received for each contract/grant. The Applied Amount in this report matches with the Receipt Amount in the Quantum Analytics - Award Detail report under "What's been Billed & Collected on this Award."

The Contract Owning Organization prompt has been enhanced which allows you to enter either a full or partial Org number to retrieve a list of transactions for one specific Org number or a list of transactions for all related Org numbers. Please refer to the QF UPK Enhancements to the SPON Receipt Applications Details Report

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REMINDER   **Webforms for NONPO Invoice Documentation & W-9**

The Office of the Controller (OOTC) reminds you that effective July 1, 2022, the new webforms are to be used instead of emailing documents via [secure] email. Please do not send documents through email. You can access the forms at the following links: W-9 Submission Webform NONPO Invoice Supporting Documentation Submission Webform . A copy of the related training presentation held on June 7, 2022 and June 13, 2022 can be found here . This announcement is also posted on the OOTC – Disbursements website here.

PCard Transactions Report (QFN130)

A clarification has been made to the column previously titled "Delegate" on the PCard Transaction Report (QFN130). The column is now titled "Report Created By" and will show the user who created the corresponding expense report. If the name shown does not match that of the Cardholder, the Delegate created the expense report. If the Cardholder creates the expense report, this field will show as blank.

New Feature in Quantum Financials

A new feature will be available in Quantum Financials by the end of July: Multi-year Purchase Orders with accurate encumbrances. Non-grant budgets are based on the fiscal year ending 6/30. In Quantum Analytics, the Budget to Actuals reports show a budget amount, actuals amount, encumbrance amount and remaining balance. However, when a PO crosses fiscal years the remaining balance is not accurate because the encumbrance is completely reflected in the current fiscal year instead of being spread across each of the applicable fiscal years. Currently, the Quantum Analytics reports reflect an over encumbrance in the remaining balance for the current period. Creating PO encumbrances across fiscal years for these multi-year POs is more accurate and provides more meaningful reporting in Quantum Analytics. This new feature in Quantum Financials will be available by the end of July. More information and training will be available soon.

Printing Debit Memos

When needed, complete debit memos can be printed from Quantum Analytics. Within Quantum Financials, you can print the rows of your debit memo (without the header information) using the **Excel Export icon** above the rows of lines.
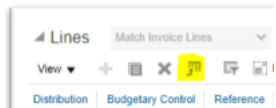
Follow the steps outlined here and refer to the QF UPK Reviewing Debit Memo Document History for more information.

If the debit memo **has been** routed for approval :	If the debit memo **has not** been routed for approval:
⇒ Open the debit memo, click Actions > Edit (This will display all rows of data) ⇒ Open the Lines area ⇒ Click the Excel Export icon above the line items ⇒ All lines of distribution will download into Excel (except the Header information)	⇒ Open the debit memo ⇒ Open the Lines area, if needed ⇒ Click the Excel Export icon above the line items ⇒ All lines of distribution will download into Excel (except the Header information)

eUMB Financials and Raven Applications to be Retired

As we successfully close the third fiscal year with Quantum Financials, CITS will be retiring the legacy eUMB Financials and Raven applications. These PeopleSoft applications and the hardware that supports them have reached the end of life and will no longer be supported. Once retired, campus users will no longer be able to access these online applications. **The target date for retirement is the end of August.**

Quantum Financials Upgrade Scheduled for August

The Quantum support team will soon be testing the next quarterly upgrade (22C) for Quantum Financials. Any new features from the upgrade will be available to users by 8/20/22. You can find information about Quantum upgrades and planned outages on the IT Alerts section of the myUMB portal page. Remember to clear your browser cache before you sign into Quantum Financials and Quantum Analytics after any upgrades so that any new features or fields will appear. After the upgrade, 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.

New Systems Are Coming!

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.

We will be migrating to SAP Concur Travel and Expense, a fully integrated travel booking and expense application. The implementation team is made up of functional, technical, and departmental subject matter experts. This project is on an aggressive timeline, with pilot group access beginning in Fall 2022 and wider roll out to all campus users planned for Jan 2023. Our first town hall was held on July 11 with 270 interested users in attendance. The recording and presentation slides can be found on the Business Applications website. Look for our next town hall in September where we plan to showcase a demo of what our system will look like.

The current PeopleSoft HRMS system is being replaced by the cloud-based Oracle HCM product to compliment and integrate with our Quantum Financials, Analytics, and Planning and Budgeting systems that went live in October 2019. Quantum HCM will be a contemporary application addressing our people management and payroll service needs. The project team includes numerous functional and technical experts, as well as subject matter experts from schools and departments across the university. The implementation timeline for Quantum HCM stretches from early 2022 into Fall 2024. The project is currently in the process review and product discovery phase, working with our consulting partners from Huron Consulting to identify our needs and how the Oracle HCM product could be best configured to address them. We will be holding town halls and other presentations throughout the project life cycle and developing a website to keep you informed.

Stay tuned for more exciting information on both of these new systems!

Displaying Project Profile Card and Project Budgets

The Project Profile Card, like the Award Profile Card, can be displayed in the Award Detail Report by selecting the Project Number in the "Projects on this Award" dropdown box. This enhancement provides all Project Numbers that have been set up for the Award. This information is also used to verify the accuracy of Award set up. The Project Profile Card gives you information such as Project Number, Project Name, and start and end dates. To display the Project Profile Card, select "Projects on this Award" dropdown box and select which Project Number you want to see. The Project Profile now includes the Project Budgets for multiple funded years on the QA4.P4.R10 report "What is the Budget to Costs and Commitments Summary for this Award/Project."

Award Detail Report - LTD Billed and Collected

The QA4.P4 - Award Detail Report gives users the option to select "What has been Billed and Collected on this Award", using the Report Selector. When selecting this option, the return information is based on the current date you are running the report and not the Fiscal Period. The report returns only current information. When selecting the current month for fiscal Period in the dashboard prompts, the report return matches the (QA4.P4.T2) with the (QA4.P4.R17) reports.

Remember, when you email PO_Close@umaryland.edu to request a PO to be closed, use the Subject line "**Close PO#XXXXXXXXX**" 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. The Quantum Financial Training sessions for August and September are included on the Financial Calendar.

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

Analytics Coaching Sessions

Once a month, Quantum Analytics users are invited to schedule 45-minute timeslots 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 classes are also delivered via WebEx, but do not require advance registration. You can access all the sessions using the log-in information below:

Analytics Brown Bag Lunch 'N Learn Workshops

Starting Thursday, July 28th, Quantum Analytics will offer occasional noontime Brown Bag Lunch N Learn Workshops. The first topic will cover the Transaction Details Union report for Actuals. We'll review report parameters (Dashboard Prompts) and Transaction Types for both awards and SOAPFs; ways to manipulate the results in Analytics; *and* how to use the Actuals "Cheat Sheet" (Excel User Aid) to better understand Attributes 1 – 7 and other column name results. We will end by demonstrating exporting to the different spreadsheet formats and some Pivot Table tips.

https://umaryland.webex.com/join/bmerrick   **Access code:** 730 028 347   To phone in: 415-655-0001