Quantum Bytes — an update on all things Quantum

University of Maryland Baltimore

Find prior issues of Quantum Bytes here

Focus on PCard- Reminders, Suggestions, Notifications

PCard Transaction Report QFN130 QF Campus Report

The PCard Transaction Report available under the Campus Reports Icon in Quantum Financials can be a very useful tool for managing your PCard activity. A User Aid for "How to Run the PCard Transaction Report" can be found on the Quantum website. This versatile tool can be used by cardholders, authorized reviewers, reallocation delegates, and department administrators to manage PCard responsibilities. A best practice suggestion is to run the report at least monthly.

PCard Expense Report Status Definitions

A PCard Expense Report, and its related expense items, can be identified in one of several statuses throughout its lifecycle. Definitions of each status are available on the Quantum website.

Attachments Reminder

When reallocating PCard transactions, remember to include all supporting documentation as attachments. A best practice suggestion is to include documents supporting each transaction at the line item level and, on at least one expense report each month, include the transaction log and Visa statement at the header level. Instructions for how to include attachments can be found in the UPK tutorial for Creating an Expense Report.

Requesting Cardholder Information Changes

Important changes to cardholder information (e.g., name change, new approver or delegate) must be made by submitting a UMB Purchasing Card Account Maintenance Request Form to Strategic Sourcing and Acquisition Services. Additional required information specific to each requested change is also included on the form. Questions about the PCard program may be directed to Regina Spencer, SSAS Assistant Director, Business Development Programs at 6-8304.

Quantum Financials Notes

Quantum Financials Campus Reports

QFN205 Invoice Status Report

The Quantum support team is getting ready to release the new Quantum Financials QFN205 Invoice Status Report and related UPK tutorial. Both will be available after Friday, October 22. The report, QFN205 Invoice Status Report, will be located under the Campus Reports Icon on the Quantum Financials home page. This report will allow end users to verify the approval and validation statuses for invoices and payments made to Suppliers. While parts of this information are available in various places such as Quantum Analytics - R50 Report and the Transaction Details Union Report, the QFN205 Invoice Status Report will now pull it all together in Quantum Financials with options for selection parameters such as Project Number, Award Number, ORG, Supplier, and Account Combo or SOAPF. The UPK tutorial will walk users through how to run the report and will include information on matching Business Unit with Payment Method and Approval Status, as well as definitions for Validation Statuses. Look for more information on using this helpful new report in future Bytes issues.

QFN129 Project SOAPF Combo Report

The QFN129 Project SOAPF Combo Report located on the Quantum Financials home page under the Campus Reports icon has been updated, changing the Business Unit default from NONSPON to SPON.

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](#).
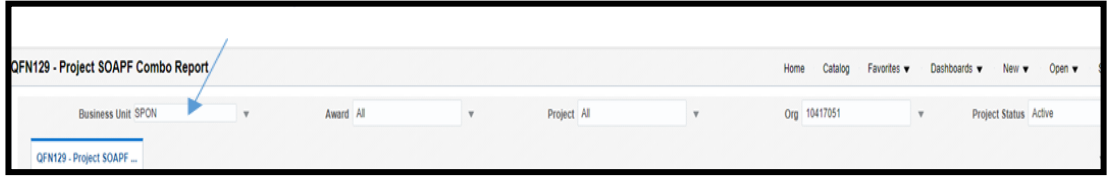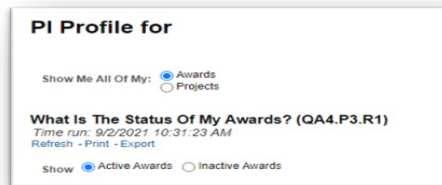

Quantum Analytics Notes

Modification to Transaction Details Union Report Page

The header page for the Transaction Details Union download report has been modified to include *Tips for Using This Page*.
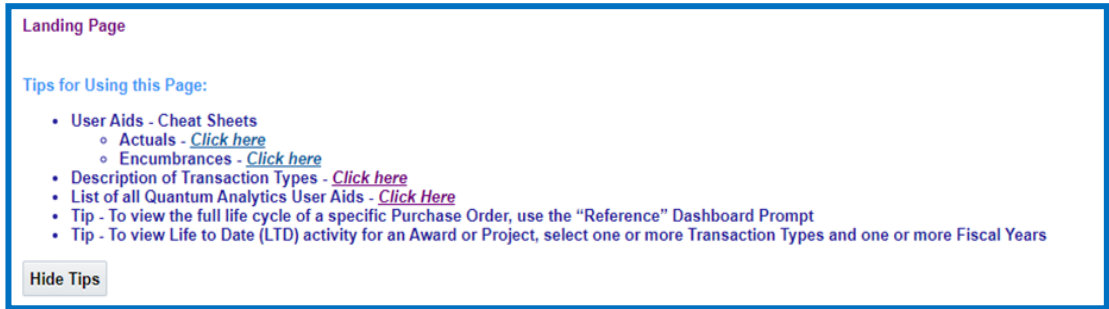

Update to PI Profile Report

Quantum Analytics Sponsored Management Dashboard PI Profile (QA4.P3) Report provides information on the entire sponsored portfolio for an individual Principal Investigator. New radio buttons have been added allowing users the option to show either Active or Inactive Awards and Projects. The resulting report has drillable capability to the Award Detail Report for further review of each award.

New Views for Quantum Analytics SPP 7062 Activity Report

The SPP 7062 report under the Sponsored Management dashboard can be used to get the detailed working fund/check request and debit memo activity related to study participant payments (SPP). Although it is located under the sponsored dashboard, it will show non-sponsored activity as well. The results are drillable to the related NONPO invoice or debit memo details. New "View by" options have been added to provide an Abbreviated Columns view and an AP/Working Fund view that limits the columns to just those needed by AP as working fund request backup.
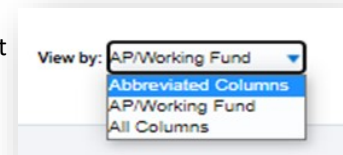
Quantum Analytics Dates

Dates within Quantum Analytics are being standardized into m/d/yyyy format across the application. Please make note of those changes, especially if you download data into another application or spreadsheet.

New Quantum Analytics WebEx Seminars and Workshops

The following workshops are now open for registration!

Accounting Date	Budget Date
07/01/2021	07/14/2020

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 Details Union Report

This workshop introduces you to the broad range of reporting available in the Transaction Details Union report 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.

Important Reminders

Quantum Financials Upgrade Scheduled for November

The Quantum support team is preparing for its next quarterly upgrade for Quantum Financials coming in November 2021. As with all Quantum upgrades, the team evaluates the release notes provided by Oracle to determine which new features will impact our system based on our configuration decisions and plans for testing before the upgrade will be pushed to the production environment. The team will be testing the applicable new features over the second and third week in November and the upgrade will be applied on Nov 19. 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 in to Quantum Financials and Quantum Analytics after all 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.

Sending Secure Encrypted Emails with Office 365

All UMB persons with an Office 365 email account can send encrypted email by adding `[secure]` to an email's subject. Office 365 will encrypt the email and all attachments before sending the email to recipients. Recipients can reply to the encrypted email and their reply plus any added attachments will also be encrypted. When sending any confidential information (PHI, PII, credit card information, etc.), it is strongly recommended to use this method to ensure that only the recipient can view the information. An encrypted email cannot be larger than 25 megabytes. Please refer to the Center for Information Technology Services webpage for more detailed instructions.

Important Message from Disbursements

There have been recent staffing changes in Disbursements. Please visit the Disbursements Staff Directory to determine the appropriate person to contact for questions related to invoice processing or payments.

Using the Helpdesk – A Request from the Quantum Support Team

The Quantum support team asks that you please keep sending your Quantum requests for help through the helpdesk at help@umaryland.edu *and not to individual support team members or 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.

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 October/November Quantum Financials training classes include:

Quantum Financials Course Name	Date/Time
Creating & Approving Requisitions	Wed, Oct 20 – 9:00 AM – 12:00 PM
Creating Customer Billing	Wed, Oct 20 – 1:00 PM – 4:00 PM
Using Debit Memos for Accounting Transfers	Thu, Oct 21 – 9:00 AM – 12:00 PM
Reallocating & Approving Procurement Card Transactions	Thu, Oct 21 – 1:30 PM – 4:00 PM
Introduction to Quantum Financials	Mon, Nov 15 – 10:30 AM – 12:00 PM
Searching for NONPO Suppliers	Mon, Nov 15 – 1:30 PM – 3:00 PM
Using NONPO Invoices for Check Requests	Tue, Nov 16 – 9:00 AM – 12:00 PM
Reallocating & Approving Procurement Card Transactions	Tue, Nov 16 – 1:30 PM – 4:00 PM
Creating & Approving Requisitions	Wed, Nov 17 – 9:00 AM – 12:00 PM
Creating Customer Billing	Wed, Nov 17 – 1:00 PM – 4:00 PM
Receiving Orders	Thu, Nov 18 – 10:00 AM – 11:00 AM
Using Debit Memos for Accounting Transfers	Thu, Nov 18 – 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 November Quantum Analytics classes include:

Quantum Analytics Course Name	Date/Time
Actuals & Encumbrances in Transaction Detail Union Reports	Wed, Nov 3 – 2:00 PM – 3:30 PM
Tips, Tricks, & Troubleshooting in Quantum Analytics	Thu, Nov 4 – 2:00 PM – 3:30 PM
Sponsored Management Dashboard Intro	Tue, Nov 9 – 9:00 AM – 11:00 AM
All Activities Management Dashboard Intro	Wed, Nov 10 - 9:00 AM – 11:00 AM
Payroll Management Dashboard Intro	Thu, Nov 11 – 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.