UNIVERSITY of MARYLAND BALTIMORE

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Quantum Financials Notes

Find prior issues of Quantum Bytes here

Quantum Financials Reports

The Requisition Status Report (QFN232) is a new report accessible via the Reports Icon on the Quantum Financials home page. It can be found under Procurement on the Reports Dashboard. It was designed to assist users who need to know the status of requisitions entered by themselves or others. The report can be run by multiple prompts, such as Requester, Req Number, or Charge Account Org, among others. The Requisition Status parameter can be used to further narrow down the list. This new report can be run by anyone, regardless of whether they have the ability to create or approve requisitions.

Please refer to the Requisition Status Report UPK which can be found by selecting the Quantum System Tutorials link under the Training & Tutorials widget on the new myUMB Portal.
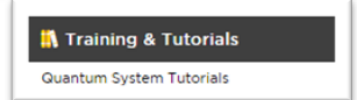
The SPON Receipt Application Details Report (QFN237) is a Billing & Collections report used for Sponsored Projects that has been added to the Reports Dashboard under the Quantum Financials Reports icon. This report provides the applied amount of cash deposits received for each contract/grant. The Applied 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 three new report prompts, Contract Owning Organization, Customer Name and Customer Number have been added to allow users to run a single report containing all deposits received. Note that the report prompts do not provide a search option, so it is suggested to cut and paste the contents for those parameters.

NONPO Invoice Documentation

Effective July 1, 2022: New Webforms for NONPO Invoice Documentation and W-9 Forms

Two new webforms have been developed for submitting NONPO invoice supporting documentation and W-9 forms. Instead of emailing the documents to the appropriate email address via [secure] email, effective July 1, 2022, the documents must be submitted through the new webforms. Disbursements provided training sessions to cover this change and will post the presentation on their website soon.

Non-Employee Travel Reimbursements

Effective July 1, non-employee travel expense reimbursement forms will need to be entered directly into Quantum Financials as NONPO invoices instead of the Travel and Business Expense (TBE) system. Travel request forms for non-employees will still need to be entered into the TBE system. Note that this change only affects travel reimbursement forms for non-employees. Refer to the Pocket Guide for Business Travel for quick reference to policy, processes, trainings, and help.

## 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 late summer. A specific date will be communicated in the coming weeks.

Adding the Training and Tutorials Widget to your new myUMB Portal

The new **Training & Tutorials** widget provides access to a variety of tutorials including those for eUMB, Office 365, and Quantum (Financials, Analytics, Planning & Budgeting). Follow these steps to add the widget to your Portal home page.

1. Login to myUMB Portal.
2. Open **Settings** by clicking the gear icon next to your name.
3. Click the **Widgets** icon.
4. Scroll down to the **Add Widgets** section.
5. Click the **Add** button to the left of the **Training & Tutorials.**
6. **Training & Tutorials** should now appear on your myUMB Portal page.
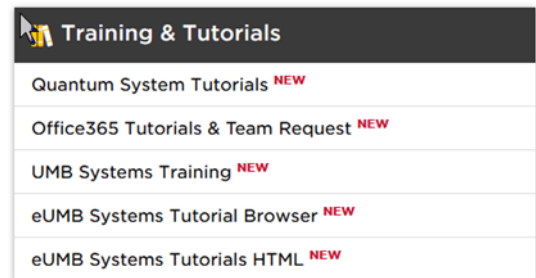
If there are other training-related links you'd like to see on this widget, please email the Business Applications Training Team at DL-BFBusinessApplications@umaryland.edu.

Another very helpful widget you should add is **What's New**. The **What's New** widget lists new additions to the myUMB Portal whether or not you have added the new item to your home page. This is an easy way to see new widgets, icons, and links as they are suggested and added.

Quantum Analytics Notes

Finding LTD Costs in Quantum Analytics

It was recently brought to our attention that the Search Report (QA4.P2.R2) and the Award Detail Report (QA4.P4.R10) both contained a column titled "LTD Costs" that in some cases contained different totals. After investigation, it was determined that the reports were presenting the proper data, but the column names were not clear. The Search Report was showing LTD Costs **that have been billed and collected**, while the Award Detail Report was showing true **Total LTD Costs** (including costs not billed/collected). The column name on the QA4.P2.R2 Search Report has now been changed to "**LTD Costs Billed/Collected**." Thank you to one of our astute Quantum Analytics users who brought this to our attention!
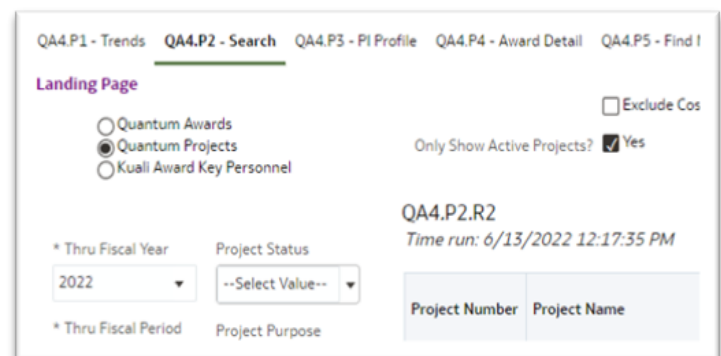
Analytics Brown Bag Showcase – Coming Soon

The Center for Vaccine Development and Global Health will demonstrate their enhanced Excel Dashboard showcased in January 2021 incorporating Award Detail and PI Profile reports into their monthly PI award/project check-ins. In the prior version, expenses were manually entered. In this new version, the data entry has been streamlined by allowing data input from Analytics, to update the Dashboard automatically. The Brown Bag Showcase is scheduled for Thursday, July 21 from noon – 1PM. You can access the session using this log-in information: https://umaryland.webex.com/join/bmerrick Access code: 730 028 347   To phone in: 415-655-0001

Quantum 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.

Remember

Important Reminders

Important

Important Fiscal Year-End Deadlines

The FY22 Year-End Deadlines announcement has been posted to the Office of the Controller website. Please circulate the announcement to all personnel involved in the fiscal and business operations in your department. Heading into the end of Fiscal Year 2022(FY22), your cooperation is requested to ensure transactions are properly recorded in the correct accounting period. Adherence to the prescribed procedures is important. The fiscal year ends on Thursday, June 30, 2022, and the final balances will be viewable in Quantum Analytics no later than Friday, July 29, 2022.

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.

UMB Foundation Fiscal Year End Disbursement Processing Deadlines

Important year-end processing information from the UMB Foundation (UMBF) is published in The Elm. Note that disbursement requests must be fully approved by Wednesday, June 15 for inclusion in FY22. Requests approved after June 15, 2022, will be processed in Fiscal Year 2023. Please direct questions to umbfdisbursement@umaryland.edu.

For more information about the UMB Foundation (UMBF) and USM Foundation (USMF) Reimbursements to UMB, please refer to the Customer Billing – Foundation Reimbursements webpage on the Office of the Controller website under the General Accounting section. If you have any questions about Quantum Billing, please contact Sheri Myers at smyers@umaryland.edu.

Financial Systems is now Business Applications

Please note that Financial Systems has changed its name to **Business Applications**. The distribution list for requests has also been updated to DL-BFBusinessApplications@umaryland.edu.

Email for PCard Communications

The email for communications regarding the PCard is PCard-Admin@umaryland.edu.

PO Close email Reminder

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.

Quantum Training

Quantum Financials

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.

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 DL-BFBusinessApplications@umaryland.edu to reach the Training Team.

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.

Quantum Analytics

Quantum Analytics classes are also delivered via WebEx, but do not require advance registration. You can access all the sessions using this log-in information: https://umaryland.webex.com/join/bmerrick

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