April 27, 2020

Volume 5, Issue 2

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Quantum Analytics Upgrade

Quantum Analytics recently received its first upgrade since the system went live last fall. Several new and improved features were rolled out, including a search field on the landing page to help you locate reports throughout the application, the ability to export data to formatted Excel with numbers appearing already formatted as numbers instead of text, and updated search boxes that default to "Contains" with "Match Case" unchecked as well as more rows of data returning on a report, both of which will cut down on additional unnecessary clicks. Now that the upgrade is completed, the Analytics support team will continue to work on additional requested improvements. Be on the lookout for notifications of new features and reports.

Quantum Financials Upgrade Coming Soon

On the heels of the completed Quantum Analytics upgrade, the Quantum Financials support team is preparing for its next quarterly upgrade coming in May. 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 first two weeks in May and the upgrade will be applied by mid-May. If any of the upgrade features will impact the Quantum Financials user experience, we will cover them in a future issue

Cost Share Flag

Quantum Analytics users will notice a change to the label and default setting for the Cost Share flag across the application. The label now reads "Exclude Cost Sharing" instead of the previous version of "Include Cost Sharing?" with the box checked for No. The default setting will be to leave the box unchecked (i.e., include cost share), except on the Award Detail page, where the box will be checked by default to exclude cost share from the returned results.

Year End Close Letter

Financial Services has issued the Year End Closing Letter for FY 20 which includes many important dates and deadlines. The letter can be found via the Employee News link on your Quantum Financials home page and on the Financial Services Announcements page. As we approach the first fiscal year end since converting to Quantum Financials, be sure to carefully read the letter as some business processes may have changed.

Important COVID-19 Related Announcements from Financial Services

Visit the Financial Services Announcements page for important information regarding temporary modifications to Research Study Participant Payment procedures, invoice processing, and other services under the Continuity of Operations Plan (COOP) Teleworking Phase in response to COVID-19.

Month End Close

The updated Financials Calendar has been posted in the eUMB News section of the Portal page. You can still find the notification of month end closing under Employee News on your Quantum Financials home page too.

Travel Agency Charges

Please be aware that posting of travel agency charges to the appropriate Projects or SOAPF Account Combos in Quantum Financials has been delayed. Financial Services is working on getting those charges applied as soon as possible.

Helpdesk Update and Reminders

The Quantum support team has been working on reducing the number of helpdesk tickets and wait times to receive a response. Just a few weeks ago, there were over 150 tickets in both the Quantum Financials and Quantum Analytics helpdesk queues and now that number is down to less than 70. Many of the remaining tickets relate to known issues which the team is actively working on with Oracle to identify a viable solution. As soon as solutions are identified and tested, the helpdesk customers will be notified.

Some helpdesk customers have expressed frustration over not knowing where to send their requests for help. The Quantum support team continues to recommend that any requests for help with using or getting results from Quantum Financials or Quantum Analytics should be sent to help@umaryland.edu. This is a different address from the helpdesk support you may get from your specific school. School specific helpdesks may not be able to answer your questions about Quantum and may direct you or your request to the UMB helpdesk.

Another reason we ask that you keep using help@umaryland.edu for your Quantum requests is that it builds the knowledgebase for the responders on the Quantum support team and also enables tracking of issues so we can appropriately tailor training and communications. A repository of known issues with resolutions will be coming soon.

Please do not also send your requests for help to quantumfinancials@umaryland.edu or directly to individuals on the support team, as that will cause duplication of efforts and an inefficient use of the limited support team resources.

We thank you for your patience as the team works through your requests for help.

PCard Tips and Notifications

Attachments
With most employees working from home, the ability to upload documents to PCard expense reports may be limited. If you have a document in hard copy form and need to upload it to an expense report, you could take a picture of the document and email it to yourself. Once you open the document from your email, you will save it and attach it to the expense report at the header or individual item level. Remember to take and save the picture at a lower resolution to remain within the attachment file size limit.

Reallocation Timing
Reallocations should not be done between the day after the billing cycle end date (usually the 26th of the month) and the 1st of the next month to allow for the PCard accrual and reversal processes

PCard Tips and Notifications

to take place. If you reallocate charges during this time, you may see your charges duplicated until the reversal entry is processed on the 1st of the next month. You can consult the financials calendar for specific dates each month.

Personal Amount Field

You may have noticed that there is a field labeled **Personal Amount** on the page where you reallocate your PCard Expense Items. Like other pages throughout Quantum Financials, there are fields that we do not use, but cannot hide or gray out. The Personal Amount field is an example of one of those fields. No charges should be entered in the Personal Amount field. If you mistakenly make a personal charge using your PCard, you should immediately attempt to get a refund from the merchant and note both the personal charge and anticipated refund in the description field. If you are not able to get the merchant to agree to process a refund, you will have to write a personal check and deposit it to the same GL account combo to which the charge was reallocated. The procedures for depositing checks can be found in the instructions on the Financial Services announcements [page](#).

Quantum Training

The Quantum Training Team will be involved in testing the upcoming Quantum Financials upgrade and updating the UPK tutorials to reflect any changes. While the team is busy with these duties over the next few weeks, they are planning fewer scheduled training sessions. Remember that you still have access to the library of [UPKs](#) and recorded [webinars](#) and [user aides](#).

Looking Forward - The training team is planning to:

- Include links to upcoming training sessions into a more interactive financial calendar, to help users stay more informed about Quantum training opportunities.

- offer one-hour, recorded WebEx open forum webinars on Quantum Analytics topics:
  - All Activities Reporting (Budget to Actuals Summary and Detail, All Source, Trends)
  - Sponsored Reporting (Award Detail, Search by Award or Project, 30/60/90 day reports)
  - Transaction Details Union Reporting
  - Other Topics Under Development

Current Quantum Analytics session plans are:

Quantum Analytics Course Name	Date/Time
Introduction to Payroll Management Dashboard (for new employees)	Fri, May 29th—9 am—11 am
Introduction to All Activities Management Dashboard (for new employees)	Tues, June 2nd— 9 am—11 am
Introduction to Sponsored Management Dashboard (for new employees)	Thurs, June 4th—9 am—11 am

Reminders

Hierarchies

You can find the Quantum Org and Quantum Object hierarchies on the Chart of Accounts page on the Quantum Financials [website](#).

Rejected NONPO Invoices that are not reworked and resubmitted must be canceled. If the check request is no longer needed, the initiator should delete/cancel the invoice by clicking on Invoice Actions and selecting the appropriate option. In preparation for year end, Financial Services – Disbursements will be deleting/cancelling any NONPO invoices that have not been resubmitted for approval within 30 days.