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Quantum Bytes will now be issued monthly. All prior issues can be found at:

[Previous Quantum Bytes Issues](#)

Focus on PCard

This is a recurring section that will feature information on PCard reallocation and record keeping with Quantum. Check out past and future issues of [Quantum Bytes](#) for more PCard information, and if you have other PCard related topics that you would like to see featured, send them to quantumfinancials@umaryland.edu with **Focus on PCard** in the subject line.

Important Tips and Reminders

The following are some important tips and reminders that have been covered in previous issues of Quantum Bytes. Follow the links to read the full article.

[Importance of Completing Reallocations](#) - PCard transactions appear as expense items that must be added to an expense report and reallocated to the appropriate project or account combo before they can be fully accounted for and reflected as charges in Quantum Analytics reports.

[Never Create PCard Items](#) - PCard transactions are downloaded from USBank daily, so Cardholders and Reallocation Delegates should never use the “Create Item” feature to add an item that does not yet appear in the expense items list.

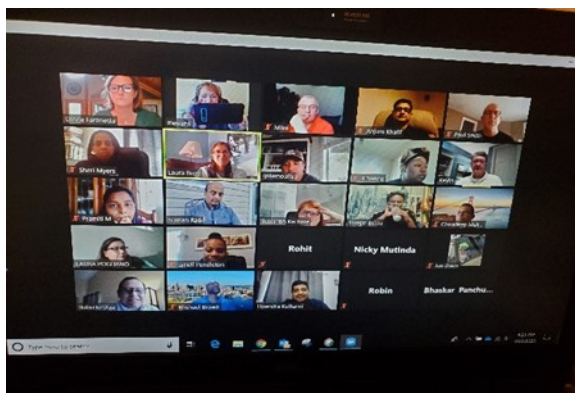
[PCard Transaction Report](#) - The PCard Transaction Report available under the Campus Reports icon in Quantum Financials can be a very useful tool for managing your PCard activity.

[Reallocation Tips](#) – To minimize the chance that your expense report will get stuck and not make it through the accounting process, follow the reallocation tips provided.

[Viewing Expense Reports](#) - Instructions for how to view saved and submitted expense reports can be found on the Quantum website.

Quantum One Year Anniversary and Statistics

October 2, 2020 marked one year since UMB went live with Quantum Financials. That year went by fast (maybe because most of us spent the majority of it working from home). To celebrate this important milestone and enjoy a well-deserved break, the Quantum project



team got together for a virtual happy hour. We even had some members of the consulting team and at least one recent retiree show up to raise a virtual glass with us!



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Quantum One Year Anniversary and Statistics

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Reminiscing about all the work that went into getting Quantum up and running led us to put together the updated Quantum transaction statistics below. The numbers show that after the high volume of transactions that were entered the first few months after go-live, system usage has settled into a consistent pattern of transactions processed by both the end user community in schools and departments (e.g., requisitions, PCard expense reports) and by central office staff (e.g., POs, working fund checks, Awards/Projects).

	As of 12/31/19 (3 months)	As of 10/2/20 (12 months)
# of requisitions created	2,688	9,758
# of POs dispatched	1,097	4,263
# of requests for payment (PO & NONPO) sent to the State	6,124	24,042
# of working fund checks printed	1,433	5,241
# of debit memos processed	2,194	9,485
# of customer billings processed (non-project)	1,011	2,378
# of PCard expense reports created	2,491	11,247
# of Awards created	345	1,366
# of Projects created	501	1,950

Some other important statistics from the first year include:

There are currently about **970** users across both Quantum Financials and Quantum Analytics.

Over **2,000** helpdesk tickets were resolved by the small but dedicated Quantum support team (about 10 cross functional members from Administration & Finance and CITS).

The Quantum training team created **35** different courses or workshops, and offered **200** sessions in-person or virtually. See upcoming sessions on page 4 of this issue.

Remember Clear Cache Often

This is especially important after upgrades and patches so that you access the most up-to-date page versions.

Best practice suggestion is to clear your browser cache every day as part of signing into Quantum.

Instructions can be found [here](#).



Upgrades to QF & QA

The Quantum support team is planning for a pretty busy November since both Quantum Financials and Quantum Analytics are expecting upgrades in the next month or so. All upgrades are extensively tested before being absorbed into the production environment, so the whole process takes a few weeks. The Financials upgrade is planned for **November 20th**. We are still waiting for a confirmed date from Oracle for the Analytics upgrade. If any upgrade features will significantly impact the end user experience, we will explain them in our next issue. Stay tuned!

Suggested Browsers for Quantum

Internet Explorer (IE) will no longer be supported for use with Oracle Applications beginning with the upgrade we will absorb in November 2020. Browsers that are supported and that users should transition to as soon as possible, include Google Chrome, Mozilla Firefox, Microsoft Edge, or Apple Safari. Be sure you are working from the most up-to-date version of whichever browser you use.



Recent Quantum Financials Monthly Closing Dates

Notice of Quantum Financials monthly closing dates can be found under Employee News on the Quantum Financials landing page. The month of August 2020 was closed on September 9th and the month of September 2020 was closed on October 7th.

Travel/Business Expense Form Tip

The Travel/Business Expense (TBE) system was recently expanded to include employee expense reimbursements. It should be noted that each TBE form can only have one earnings end date. Therefore, if an employee had several expenses with different receipt dates that need to be charged to multiple sponsored projects each with their own end date, separate TBE forms should be completed. If the dates from multiple receipts fall within all sponsored projects charged, they can all be submitted together on one TBE form.

Keep Clearing Requisitions

Remember to keep clearing your abandoned requisitions from your workflow list – those that you no longer need because they were returned by the buyer or rejected by the approver – so they don't continue to artificially inflate encumbrances in the Project commitment records. Steps for clearing the requisitions can be found on the Quantum [website](#) and a new [UPK tutorial](#) is available to help you.

NONPO Invoice Documentation Request

When sending documentation supporting NONPO invoices via Accellion, please remember to include the **invoice number in the subject of the email** so Disbursements staff can identify the documentation to the appropriate invoice.

Quantum Analytics

Budget to Actuals Reports and Cost Share

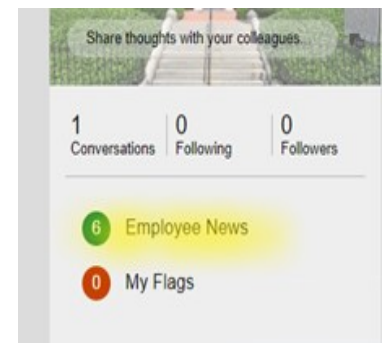
It has been noticed that the report of *Who is Being Funded on This SOAPF Code? (QA3.P5.R3)* on the Budget to Actuals Detail page does not include the cost share dollars that appear in the *How Much Budget is Left on This SOAPF Code? (QA3.P5.R1)* report just above it. That discrepancy has been reported to the Quantum support team for correction. In the interim, if you need to see the details for any SOAPF codes that fund Over the Cap (OTC) and Committed Cost Share (CCS), use the Payroll Portfolio by Funding Department report on the Payroll Management Dashboard. Any questions or concerns should be sent to help@umaryland.edu.

Cost Structure on Award Detail Report is Now Accurate

The Cost Structure column on the *What is the Budget to Costs and Commitments Summary for this Award/Project? (QA4.P4.R10)* report on the Award Detail page has been corrected. The column now reflects the appropriate grouping of expenditures by the correct cost structure (e.g., MTDC, TDC, F&A) associated with the project.

Redesigned Financial Calendar

The [newly redesigned Financial Calendar](#) can be accessed via Employee News on the Quantum Financials landing page, as well as under eUMB/Quantum News on the myUMB Portal Page.



The calendar will continue to be updated with important processing deadlines and now includes Quantum Financial and Quantum Analytics training dates. Look for the color-coded blue Training entries. Simply click to view class start/stop times and reach the registration page. You can continue to navigate directly to the [training registration database](#) and view options using Course Type = Quantum if you prefer.

Quantum Training Schedule

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.

The October **Quantum Financials** training classes includes:

Quantum Financials Course Name	Date/Time
Introduction to Quantum Financials	Tue, Oct 20 th – 9:00 AM – 11:00 AM
Creating Customer Billing and Recording Disputes	Tue, Oct 20 th – 1:00 PM – 4:00 PM
Requisitions - Creating & Approving Requisitions	Thu, Oct 22 nd – 9:00 AM – 12:00 PM
Requisitions - Receiving Orders	Fri, Oct 23 rd – 9:00 AM – 10:00 AM
Reallocating & Approving Procurement Card Transactions	Mon, Oct 26 th - 9:00 AM – 11:30 AM
NONPO - Searching for NONPO Suppliers	Tue, Oct 27 th – 9:00 AM – 10:30 AM
NONPO - Using NONPO Invoices for Check Requests	Wed, Oct 28 th – 9:00 AM – 12:00 PM
Using Debit Memos for Accounting Transfers	Thu, Oct 29 th – 9:00 AM – 12:00 PM

Note: Searching for NONPO Suppliers is now a separate class and a pre-requisite for the Using NONPO Invoices for Check Requests class.

Quantum Analytics classes do not require advance registration. You can access all of the sessions using this log-in information:

<https://umaryland.webex.com/join/bmerrick>

Access code: 730 028 347

To phone in: 415-655-0001

The October **Quantum Analytics** classes include:

Quantum Analytics Course Name	Date/Time
Create Customized All Activities GL Reports	Thu, Oct 15 th – 2:00 PM – 3:00 PM
Best Practices for Transaction Detail Union Reporting	Tue, Oct 20 th – 2:00 PM – 3:00 PM
Best Practices for Transaction Detail Union Reporting	Wed, Oct 21 st – 9:00 AM – 10:00 AM
PO and PR reporting for GL and Awards reports	Wed, Oct 28 th – 9:00 AM – 10:00 AM
PO and PR reporting for GL and Awards reports	Thu, Oct 29 th – 2:00 PM – 3:00 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-FIN-Financial-Systems@umaryland.edu. We're looking forward to seeing you soon!

Helpdesk Requests

Remember to keep sending your Quantum requests for help to help@umaryland.edu and not directly to individual support team members or to quantumfinancials@umaryland.edu. Using the helpdesk 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. Sending your requests for help directly to individuals on the support team, often causes duplication of efforts and is an inefficient use of the limited support team resources. We thank you for your patience as the team works through your requests for help.

