



January 15, 2020

Volume 2, Issue 1



Quantum Financials Stats

We last reported detailed statistics of transactions executed within Quantum Financials at the beginning of December 2019. We thought you might be interested in seeing this update through 12/31/19, about three months since Quantum Financials went live.

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	As of 12/4/19	As of 12/31/19
# of requisitions created	1834	2688
# of POs dispatched	725	1097
# of requests for payment (PO & NONPO) sent to the State	4202	6124
# of working fund checks printed	696	1433
# of debit memos processed	1290	2194
# of customer billings processed (non-project)	820	1011
# of PCard expense reports created	1014	2491
# of Awards created	284	345
# of Projects created	395	501

COMING ATTRACTIONS!!

We have heard your requests for additional functionality or access to certain information you had become accustomed to seeing in RAVEN and we are working on getting you what you need. Here are just a few Quantum Analytics enhancements that will be rolled out in the coming weeks.



Consolidated Transaction Detail Download

The transaction detail download will combine all activity for a specified period, without breaking it up by transaction type. The Quantum team is designing this complicated union report to include all the applicable fields for each transaction type to get users the raw data you have been requesting. For example, travel expenses will include the traveler name and emplID. The comments and descriptions you have entered throughout Quantum Financials will also appear in the download. We are excited to get this new functionality to you as soon as possible and appreciate your continued patience while we complete the design and testing. Once this enhancement is ready for use, you will access it through the Downloads Management dashboard in Quantum Analytics.

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Kuali Updates

The Kuali Awards download – Report QA6.P5 – Award and Project level radio button is now available for use. This functionality is designed to allow users to search Kuali awards at the Award, Project or Award and Project levels by Lead, Academic, and Lead or Academic Org choices. Additional functionality includes the ability to search by the Project Number based on the Award/Project. The report now also includes columns for Project ID, Proposal Type, Financial Department Description, and On/OFF Campus Flag.

Sponsored Management Dashboard – Search Report

The Quantum team is adding a column for Project PI Name and EmplID to the QA4.P2.R2 Search report, under the Sponsored Management dashboard. Currently, the Award PI column is available in QA4.P2.R1, but when you search by Project that column does not appear. This enhancement is under development and will be ready for testing soon. Look for it during February 2020.

Month End Close

Look for notification of month end closing under Employee News on your Quantum Financials home page and under eUMB News on the Portal page.

Once the closing process is stabilized, an annual calendar will be published.



BIORESKO – link to backup documentation

The data that is currently available in Quantum Analytics for BIORESKO charges does not show all the details users were accustomed to seeing in RAVEN. While the Quantum team works on including these details, BIORESKO has created a page, which can be used to get the backup documentation. The page requires two pieces of information – 1. BIORESKO Order Number and 2. SOAPF or Project Number to which the transaction was charged and can be accessed [here](#).

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BIORESKO Charges in Quantum

While we work with the **Quantum Team** to bring back the BIORESKO Hyperlink, please use this form to get the same backups. You'll need two pieces of information. The **BIORESKO Order Number** & the **SOAPF or Project Number** which was charged.

1. **SOAPF or Project Number:**

2. **BIORESKO Order Number:**

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Contact Us:
freezer@umaryland.edu
 410.706.0322 (ph)
 MSTF Rm.166 (Atrium)
 Monday - Friday
 8:00 am - 5:00 pm

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Training Dates

The following training sessions and workshop are available for registration:

Quantum Analytics – Campus Users	Sponsored Management Dashboard	Thursday, Jan 16	9:00 am - 12:00 pm
	All Activities Management Dashboard	Thursday, Jan 30	9:00 am - 12:00 pm
Quantum Analytics – Payroll Users	Payroll Management Dashboard	Wednesday, Jan 22	9:00 am - 12:00 pm
		Thursday, Jan 23	1:00 pm - 4:00 pm
		Wednesday, Jan 29	9:00 am - 12:00 pm
Note - attendees must have the Payroll Analyst role to be able to access the reports that will be used in class.			
Quantum Financials			
	Reallocating & Approving Procurement Card Transactions	Thursday, Jan16	10 am – 12:00 pm
	Creating Volume-Based Billing Events	Tuesday, Jan 21	1:30 – 3:30 pm
	Using NONPO Invoices for Check Requests	Thursday, Jan 23	9:00 am – 12:00 pm
	Using Debit Memos for Accounting Transfers	Wednesday, Jan 29	9:00 am – 3:00 pm
	Creating & Approving Requisitions/ Receiving Orders	Thursday, Jan 30	9:00 am – 3:00 pm
	Creating Customer Billing and Recording Disputes	Thursday, Feb 6	9:00 am – 3:00 pm
Quantum Billing System Workshop		Tuesday, Jan 28	2:00 – 4:00 pm
<p>At this workshop, we will be discussing post go-live functionality for customer billing in Quantum. There will be an opportunity to ask questions and review the existing functionality, now that you have had some experience with the system. The presentation will be recorded for those who cannot make this meeting. Prerequisite - Attendees should complete the Creating Customer Billing and Recording Disputes UPK tutorial prior to attending.</p>			

To register for one of these sessions:

- Login to the [training registration database](#)
- Choose **Add Course**
- Choose **Course Type = Quantum**
- Choose a **Course Name**

Find links to Self Service UPK Tutorials, Quantum roles and access information, recorded webex seminars, and FAQs from training sessions on the Training and Support page of the Quantum Financials [webpage](#)

New Org/SOAPF Request Forms

If you need to request a new Org or SOAPF code/segment, use the forms and related instructions that are available on the [Financial Systems Forms website](#). There are instructions and forms for a [New Org Request](#), an [Org Change Request](#), and [New SOAPF Segment Value Requests](#). Please note that if you change or add a SOAPF segment (e.g., Purpose) it will not link to the previous SOAPF for purposes of reporting total activity.

Reminder - If you created a new Purpose or Activity prior to conversion, but did not use it in any mapping, it was not brought into Quantum. If you need that Purpose or Activity now, request it using the new forms.

Quantum Planning & Budgeting Check-In

Quantum Planning & Budgeting (QPB), a companion system to Quantum Financials and Quantum Analytics, went live in November 2019 to replace the Budget Prep System.

Since then, QPB has provided users with the ability to process Budget Amendments and utilize Smart View, its ad-hoc reporting tool. Currently users are in the middle of preparing their Quarterly forecasts in the system.

Both Quarterly Forecasting and Budget Amendments were previously done outside the system by using paper copies and Excel workbooks.

Up next for QPB will be to prepare the FY21 Annual Budget.



Tips and Reminders — Here are some bright ideas!



Clear Cache

Remember to clear your cache frequently to optimize the Quantum pages. [Instructions](#) on clearing cache using various browsers are available on the CITS website.

Quantum Analytics - Clear My Customization

Use the “Clear My Customization” tool in Quantum Analytics to clear all Dashboard Prompts and results so you can run a new report or “Apply a Saved Customization” (saved report). This option is accessed by clicking the Gear icon at the top right of the screen.

Quantum Financials – Debit memos need an Org!

All debit memos need an Org number for workflow routing. The Org number to which the debit memo should route is found on the **Show More** screen. Without an Org number in the **Org# for Debit Memo Approval Routing** field, the debit memo cannot route and is auto-rejected by the system.

Remember to send your questions about using or getting results from Quantum Financials or Quantum Analytics to help@umaryland.edu.