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Quantum Financials Notes

Find prior issues of Quantum Bytes [here](#)

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PCard Year End Deadline

PCard year-end preparation is quickly approaching. According to the [Quantum Financials Year-End Deadlines](#) instructions, the expenses for PCard transactions appearing on the June 27 billing statements (and all prior billing periods) must be submitted and approved on expense reports by Thursday, June 30 if you want the expenses to be reflected in FY 22 in a Project or a GL Account Combo other than your default. Remember that your PCard VISA statements can be obtained anytime via your US Bank Access Online account. If you need assistance with accessing your VISA statement, please contact SSAS's new Purchasing Card Program Administrator, Kesa Bower at kbower@umaryland.edu for assistance. All Pcard transactions that have not been submitted and approved on an expense report as of June 30 will be posted to the cardholder's default account combo via the monthly accrual process. If you are having trouble reallocating your PCard transactions in Quantum Financials or finding your submitted PCard expense reports in Quantum Analytics, send your detailed request for help to help@umaryland.edu



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 for submitting W-9 forms. Instead of emailing the documents to the appropriate email address via [secure] email, the documents must be submitted through the new webforms. Training is scheduled for 10:00 am on both June 7 and June 13. The information presented during both sessions is the same and both sessions will be recorded. The training registration links are posted [here](#).

Checking on NONPO Invoice Approval Status

NONPO Invoice Initiators have two ways to check on the approval status of their submitted invoices. One way is through Quantum Financials Invoices icon, using Manage Invoices. Refer to the Quantum Financials [UPK](#) for detailed instructions on this option. The other option is using the Invoice Status Report (QFN205) found on the Reports Dashboard under QF Reports Icon. This option gives users the ability to search on the Status of all their invoices and verify the approval and validation status for invoices and payments.

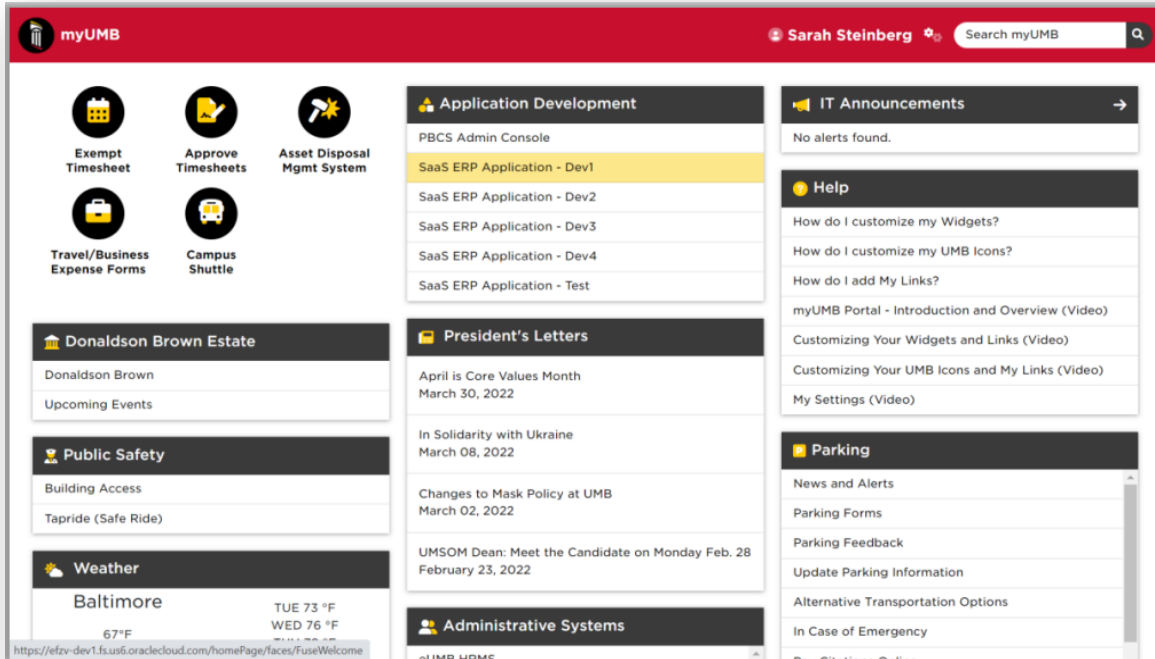
Quantum Financials Upgrade Scheduled for May

The Quantum support team is in the process of testing the next quarterly upgrade 22A/22B for Quantum Financials. Any new features from the upgrade will be available to users effective 5/21/22. 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 into Quantum Financials and Quantum Analytics after the upgrade 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.



CITS Announcement – The New myUMB Portal

The New [myUMB](#) Portal, launched on May 14, will be available through the myUMB link found on every umaryland.edu webpage. This new portal is modern and customized and is meant to be a one stop shop to access all systems, applications and news that are relevant to you.



The following link provides important information about accessing the Portal and available resources including tutorials and job aids to familiarize you with the look and feel of the new portal and what it offers. Please go to the [Center for Information Technology Services](#) webpage for more information about myUMB Portal.

Quantum Analytics Notes

Timestamp Removed from Quantum Analytics Reports

All reports in QA had time stamps along with the dates in the date fields for Accounting Date and Budget Date. Upon request from campus users, the timestamp has been removed from all QA reports and no longer appears in QA reports or when you export to Excel.

Document Number	Line Item Details	Document Description	Attribute 3	Attribute 4	Account Combo Code	Object Level A	Object Code	Object Description	Expenditure Org Code	Expenditure Org Description	Funding Source Description	Fiscal Period	Accounting Date	Budget Date	Expenditure Item Date
000642-20220407-03	5 - Reallocate CITS Telecommunication Charges for BAC 1822- Jan 2022	Reallocate CITS Telecommunication Charges for BAC 1822- Jan 2022	04/07/2022	10417051	3221-235-10417051-000000-00390674-210-00-00000-000	A100*Expenses	5221	Telecommunication Allocation (Internal)	10417051	Child Psychiatry General	Not Available	Apr-22	4/7/2022	4/7/2022	
Grand Total															

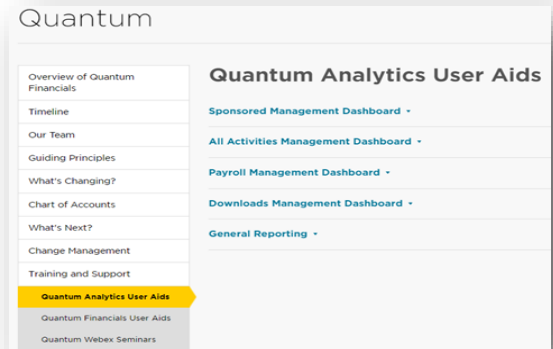
New Transaction Types in Quantum Analytics

The new Transaction Types include (AR Receipts (SPAC only), Cash Management, Projects Journals, Receivables Manual Journals, Service Center-AiM) and are all Central Office focused. Refer to the QA User Aids document [Transaction Union Details Reporting – Transaction Type Definitions](#) and the [Transaction Details Union Actuals Report Cheat Sheet](#) for more information.



Quantum Analytics User Aids Webpage has a New Look

Quantum Analytics User Aids are training and support learning resources located on the [Quantum Analytics User Aids](#) webpage on the Quantum website. The User Aids provide topic related information and include additional resources for Department end users. Open each Dashboard to find topic related User Aids for reporting instructions and examples.



New additions: *Transaction Type Definitions; The Drill on Drilling; and Sponsored Management Report Descriptions.*

Quantum Analytics WebEx Seminars & Workshops

Did you know there are 1-hour versions of the Intro classes for Quantum Analytics? For using the Search Report or finding your POs and PRs for awards or SOAPFs? Check out the [Quantum WebEx Seminars](#).

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

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 Help Desk

The Quantum support team asks that you please keep sending your Quantum requests for help to help@umaryland.edu and not to individual support team members or the Quantum Financials email box, which is not regularly monitored for such requests. The helpdesk system is designed to document, track, and triage any requests for assistance.

Important Reminders

Important Fiscal Year-End Deadlines

The FY22 Year-End Deadlines announcement has been posted to the [Financials Services](#) 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.



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 Financial Services 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.



PO Close email Reminder

The PO Close email that SSAS set up to streamline requests to close Purchase Orders has been working well. Remember, when you email PO_Close@umaryland.edu to request a PO to be closed, use the Subject line “Close PO#XXXXXXXX” 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.**

New Email for PCard Communications

SSAS has created a new email for communications regarding the PCard. Please send communications you previously directed to Regina Spencer, to the new email PCard-Admin@umaryland.edu. You can find this information on the SSAS website under the [Corporate Purchasing Card](#) selecting the PCard Administrator hyperlink.

Clearing Requisitions from Workflow

Regularly clearing unneeded requisitions from your workflow in Quantum Financials is important to the accuracy of your encumbrance balances viewed in Quantum Analytics. Those who enter requisitions may notice there are some in your workflow that are no longer needed. They could have been returned by the Buyer, rejected, or otherwise abandoned. These unused requisitions will artificially inflate encumbrances in the Project commitment records and must be cleared from the workflow list. [Steps](#) for clearing the requisitions can be found on the Quantum website.

Don't Default Customizations

Saving customizations in Quantum Analytics can be a time saver but remember the best practice suggestion is to NOT set them up as a default. See the July 2020 [issue](#) of Quantum Bytes for more information about why and instructions to remove default customizations.

Quantum Training



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 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>



Access code: 730 028 347 To phone in: 415-655-0001

