Quantum Bytes — an update on all things Quantum

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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.

How to Use the PCard Transaction Report

The PCard Transaction Report available in Quantum Financials can be a very useful tool for managing your PCard activity. The report can be found under the Campus Reports icon and a "how to" document can be found on the Quantum website.

If you administer one or many Orgs, you can select those Orgs and identify which cardholders or approvers need to take action to either create or approve expense reports prior to the month end accrual.

Cardholders need to take action when items are in the status of *Not Created*, *Saved*, *Withdrawn*, or *Manager Rejected*.
Approvers need to take action when items are in the status of *Pending Manager Approval* or *Manager Requested More Information*.

In addition to Org, the other prompts available are Cardholder, Billing Period, Expense Report Status, and Merchant Name, which was just added this week. Each of the prompts will allow you to select either one or many values.

Campus Reports

QFN130 PCard Transactions

PCard Expense Report Status Definitions

A PCard Expense Report, and its related expense items, can be identified in one of several statuses throughout its lifecycle. Definitions of each status are now available on the Quantum website.

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

Previous Quantum Bytes Issues

Quantum Quarterly Upgrades

Both Quantum Analytics and Quantum Financials are receiving quarterly upgrades this month. Quantum Analytics was upgraded on August 9th and Quantum Financials will receive its upgrade on August 21st. **Please refrain from using Quantum Financials from 10 PM Friday, August 21st to 8 AM Saturday, August 22nd to accommodate the upgrade.** Users are reminded to clear your browser cache before you sign in after any upgrades so that you are accessing the most up to date version of the application. Instructions for clearing cache can be found on the CITS website.

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.

Quantum Analytics—Award Detail PO and PR Enhancement

To provide a consistent look and feel to the *"What are the POs and PRs"* reports in Quantum Analytics, the Award Detail drill down has been upgraded, allowing users to display various views of their purchase order (PO) and purchase requisition (PR) transactions. Similar to the Budget to Actuals Report currently in place under the All Activities Dashboard, users now have the ability to select 5 different views of their Award PO and PR transactions – including Open Balances, Object, Project, Purchasing Document, and By Accounting Date views. This new capability enables Quantum Analytics users to track and troubleshoot open or closed PO and PR transactions throughout the Award lifecycle.

Debit Memo Notification Update

The debit memo email notification has been updated to show additional information. It now includes the Invoice Type, which must be Debit Memo. Also, the lines section has been updated for project lines to include Project Number, Project Name, Budget Date, Expenditure Item (aka Object), Expenditure Item Date, Award Number, and Funding Source (Sponsor or Cost Share). Note that Budget date must be the same as the Expenditure Item Date.

Continue Clearing Those Requisitions

Remember to continue clearing your abandoned requisitions – those that you no longer need because they were returned by the buyer or rejected by the approver. These unused requisitions will artificially inflate encumbrances in the Project commitment records if you do not clear them from your workflow list. Steps for clearing the requisitions were sent to those who were identified as having abandoned requisitions and can also be found on the Quantum website. If you received the request, you should complete the steps as soon as possible so that your Quantum Analytics reports will more accurately reflect encumbrances.

Direct Retros Posting

If you are looking for the results of your direct retros (DR) in Quantum, remember that, just like in eUMB, the payroll will only appear in the period to which it is posted and will not be back dated to prior months. You will see zero dollars for period activity and encumbrances until the DR is posted.

Helpdesk Requests

The Quantum support team continues to work on reducing the number of helpdesk tickets and wait times to receive a response. Please 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.

Clear cache often – This is especially important after upgrades and patches so that you access the most up-to-date version. Best practice suggestion is to clear your browser cache everyday as part of signing into Quantum.

New Calendar

The updated version of the financial calendar can now 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 training dates, so be sure to check back often.
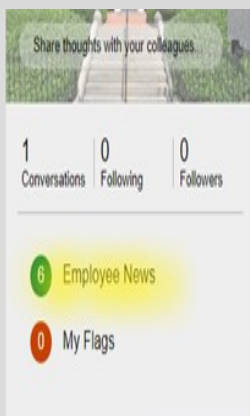
Training Dates are Included on Financial Calendar

Quantum Financials classes - offered monthly - are now easier to view using the newly redesigned Financial Calendar. Look for the color-coded blue Training entries. Simply click to view class start/stop times and reach the registration page. Training dates are posted 3 months at a time for easy planning. Class dates for August, September, and October have been posted. You can continue to navigate directly to the training registration database and view options using Course Type = Quantum if you prefer. While Quantum Financials classes are designed to introduce new users to the application, existing users are welcome to join any class for a refresher. 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!

Quantum Training Schedule

For **Quantum Financials**, you can locate classes, dates, times and registration links in the training registration database using Course Type = Quantum. When you register by 5 PM the day before the class, you will be sent an email with instructions for joining your class.

Upcoming Quantum Financials classes include:

Quantum Financials Course Name	Date/Time
Intro to Quantum Financials	Fri, Aug 21st - 9 AM - 11 AM
Creating & Approving Requisitions	Mon, Aug 24th – 9 AM – 12 PM
Searching for NONPO Suppliers	Tue, Aug 25th – 9 AM – 10:30 AM
Receiving Orders	Tue, Aug 25th – 1:30 PM – 2:30 PM
Using NONPO Invoices for Check Requests	Wed, Aug 26th – 9 AM – 12 PM
Creating Customer Billing and Recording Disputes	Thu, Aug 27th - 9 AM - 12 PM
Reallocating & Approving Procurement Card Transactions	Thu, Aug 27th - 1:30 PM – 4 PM
Using Debit Memos for Accounting Transfers	Fri, Aug 28th – 9 AM – 12 PM

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

For **Quantum Analytics**, you do not need to register in advance and can access all of the sessions using this log-in information:

https://umaryland.webex.com/meet/lquell
Access code: 732 868 109
1-415-655-0001 (to phone in)

Upcoming Quantum Analytics classes include:

Quantum Analytics Course Name	Date/Time
Sponsored Management Dashboard Open Forum	Wed, Aug 19th - 9 AM - 10 AM
Topic - TBA	Tue, Aug 25th - 9 AM - 10 AM
Payroll Management Dashboard Intro	Thu, Aug 27th - 9 AM - 11 AM
Topic – TBA	Thu, Sep 3rd – 9 AM – 10 AM
All Activities Management Dashboard Intro	Wed, Sep 9th – 9 AM – 11 AM
Sponsored Management Dashboard Intro	Thu, Sep 10th – 9 AM – 11 AM

Note: That some Quantum Analytics session topics are still being developed. If you have any topics you would like to see covered, email the Quantum Training Team at fssystems@umaryland.edu.