QUANTUM ANALYTICS

UNIVERSITY of MARYLAND BALTIMORE

Tips, Tricks, & Troubleshooting Sponsored Management Dashboard

Right Click Techniques

When to clear cache?

Dashboards

Quantum Analytics Report Search Bar

'Type Here to Search'

Refresh

Org Health Check

Org Health Check
Provides various metrics, key performance indicators, and compliance statistics for all levels of the University's organizational structure.

Get Started with Quantum Analytics!

Several resources are available to help you get familiar with Quantum Analytics.
Step through UPK tutorials here.
Find User Aids here.
Find Analytics WebEx Workshop Seminar Recordings here.
Visit the Training and Support page of the Quantum website here for other training information and links, such as recorded Webinars, Training FAQs, and the Quantum Organization Hierarchy.

Additional Functionality Now Available:
Report Search Bar on Landing Page
Transaction Details Union Report (QA6.P7)
What is the Balance of Object 7062 and 7072 on this Award/Project?
What are my POs on this SOAPF Code or Award/Project?

All Activities Management

Trends
Provides various graphical and tabular displays to analyze trends in revenues and expenses.

All Source
Provides revenue and expense detail across sources. Includes net asset rollforward. Drillable to SOAPF detail.

Search
Tool to identify SOAPF codes meeting various criteria. Drillable to Budget to Actual Detail.

Budget to Actuals Summary
Analyzes revenues and expenses with comparisons to budget and previous fiscal years, summarized by chart of account segments.

Budget to Actuals Detail
Comprehensive review of activity for a single SOAPF code. Includes comparison to budget, previous fiscal years, and various reports on transactions and current balances. Ideal for managing an individual budget. Drillable to transaction detail.

Improved Reports

Sponsored Management

Trends
Analyze year-over-year trends of sponsored proposals, awards, and expenditures on a fiscal year basis. Includes graphical and tabular displays of the data.

Search
Identify Quantum awards and Quantum projects meeting various criteria. HINT: To search Kuali Research proposals and awards utilize the Kuali download pages on the download dashboard.

PI Profile
Provides a one-stop shop to provide information on the entire sponsored portfolio of an individual Principal Investigator. Drillable to Award Detail for a deeper analysis of each award.

Award Detail
Comprehensive details necessary to manage an individual award or project. Includes budget to actual as well as various reports of revenue and expense activity on an inception-to-date basis.

Find My Award
Having trouble finding your Award Number but you know other attributes like the Project Number, PI, Owning Organization, and Sponsor? Use this page to more quickly identify Awards.

F&A Yield
Displays "F&A Yield" – a calculation of the yield of the effective indirect cost rate, expressed as a percentage of total direct costs. Page provides users the option to see the results either with or without Cost Share.

SPP 7062 Activity
Displays all study participant payment (SPP) activity processed through Object 7062 (Cash Study Participant Pay), including the initial issuance of the working fund check and the debit memo charges to Object 3125 (Participant Study Pay Group) reflecting distributions to participants. Drillable to NONPO invoice and debit memo details.

Payroll Management

Payroll Portfolio by Home Department
Displays how the labor costs of individuals employed by an organizational unit are funded across sources and by funding organization. Drillable to various levels of detail (employee, SOAPF, project).

Payroll Portfolio by Funding Department
Displays what labor costs an organizational unit is funding across its sources and by the home department of the employees' whose salaries they are funding. Drillable to various levels of detail (employee, SOAPF, project).

Payroll General Ledger Details
Analyze payroll activity charged to an individual SOAPF code.

Payroll Sponsored Details
Analyze payroll activity charged to an individual sponsored award or project.

Employee Detail
Analyze payroll charges for an individual employee across all of their funding sources. Available only to those with the Payroll Analyst role.

Trans Detail vs. R50

Downloads Management

Quantum GL Balances
Download General Ledger Balances by fiscal period at the OSOAPFUFI level. Amounts include fiscal period actuals, year-to-date actuals and encumbrances, and annual budgets.

Quantum Awards
Download Quantum Awards with budgets, revenues, billings, costs and commitments summarized at the award level. Also includes demographic data describing the awards. All data from Quantum Financials.

Quantum Projects
Download Quantum projects with budgets, revenues, billings, costs and commitments summarized at the project level. Also includes demographic data describing the projects and the awards with which they are associated. All data from Quantum Financials.

HRMS Payroll
Download payroll charges detail by employee, object, SOAPF, POETAF (if applicable), affected pay period, and posted pay period. Available only to those with the Payroll Analyst role.

Kuali Proposals
Provides a summary of proposals download detail

Kuali Awards
Download Kuali Research award information at the award and project level.

Transaction Details Union
Find and download transaction detail information across all sub-ledgers.

November 2021

Goals

- ✓ To become familiar with a variety of tips, tricks, and troubleshooting techniques that will help you spend more time analyzing data than gathering it!
- ✓ To explore User Aids and other Learning Resources.
- ✓ To provide an opportunity to share tips and tricks ***you*** have discovered in your use of Analytics.

Analytics 2021
Discovery &
Collaboration

Agenda

- Tips & Tricks for:
  - Sponsored Management Dashboard Reports
  - R50 Reports in Award Detail & Budget to Actuals Detail
- Misc. Troubleshooting Techniques
- Quick tips for Transaction Union Detail reports
- Any tips you have to share?

Sponsored Management

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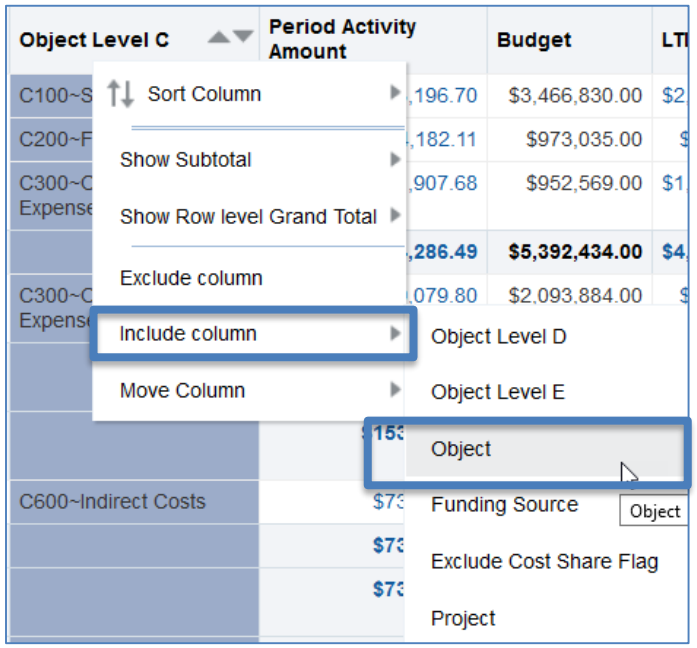
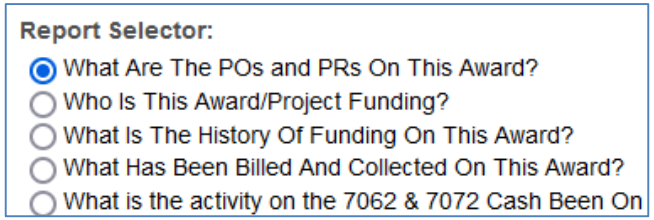
Sponsored Tips

Sponsored Reporting Tips/Techniques

- **Right Click (RC) on Object Level C** and select **Include > Object -** this is a quick & easy way to view your list by Object Code (this technique is NOT available in the All Activities reports)
  - You can also RC to include Project and/or Funding Source as a column
- If you "*Exclude*" a column, it is always available to be "*Included*" later
- **RC to Sort** by a column and to **Move** a column
- 5 Report Selectors





Sponsored Tips/Techniques Cont.

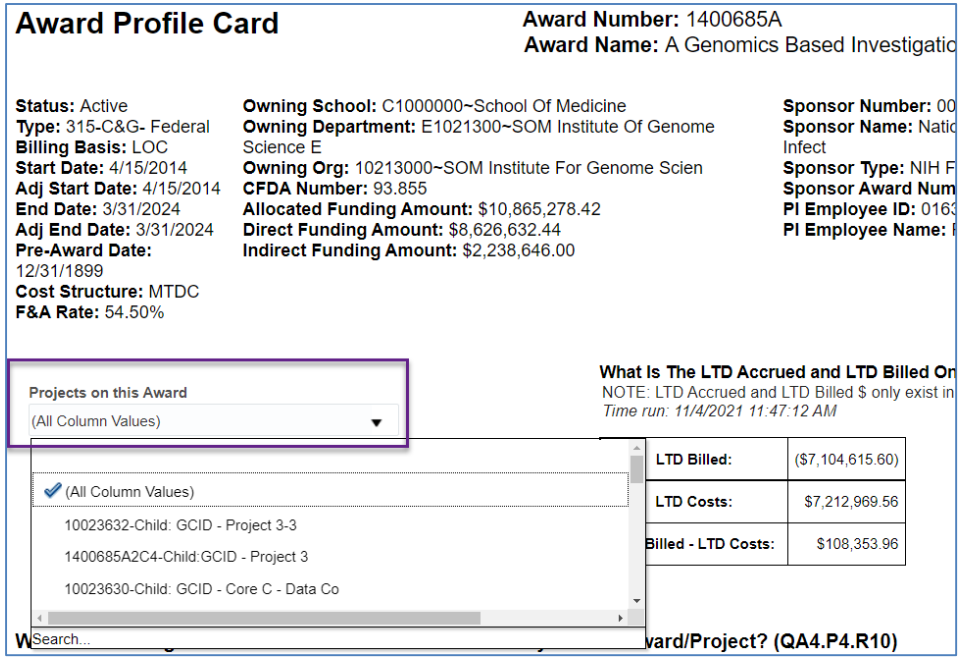
Drill Down on numeric values provides:

- LTD (Lifetime to Date) drill down reports transactions for the *current period or range of periods*

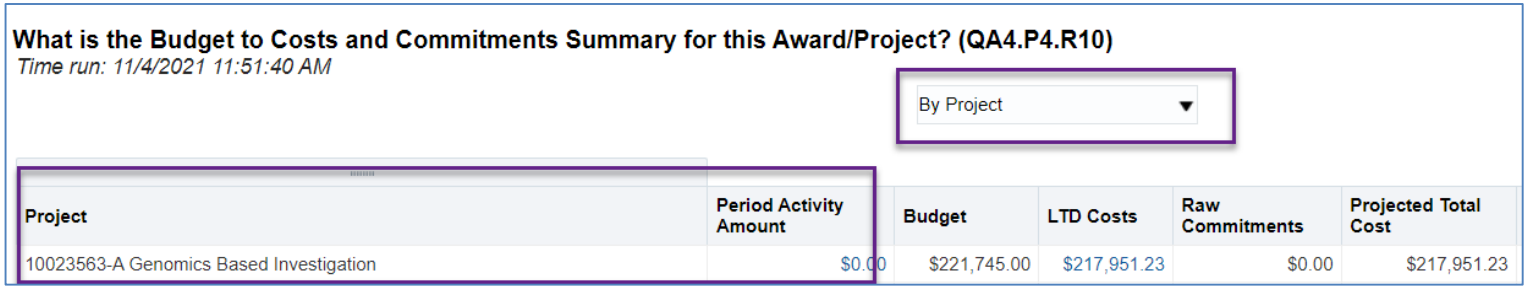
AND Pivot View or All Columns (Trans Detail) View

Sponsored Tips/Techniques Cont.

Projects on this Award



By Project "View"



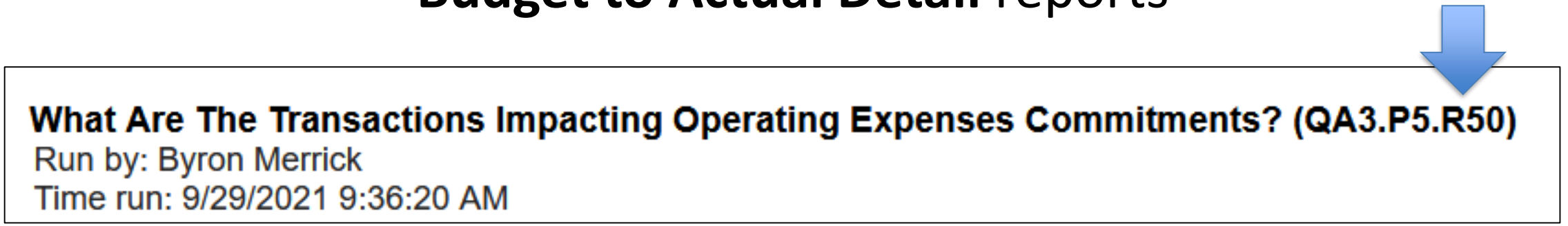
Sponsored Reporting Tips/Techniques Cont.

- **PI Profile improved** – to show Active vs. Inactive – helps report run much faster!
- **Search report** – Right Click (RC) to Move Left or Right (or to Prompts & Sections)
  - Is VERY flexible to report at the Dept level, Billing Basis, PI(s), Key Personnel, and more!
- **Hyperlinks** take you from the Search results to the Award Detail report
- These 3 reports developed for targeted users:

QA4.P6 - F&A Yield QA4.P7 - 7062 Activity QA4.P9 - 7072 Activity

R50 Report Tips

Found in **Award Detail** and
Budget to Actual Detail reports

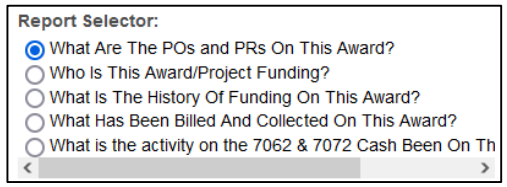


R50 Tips/Techniques

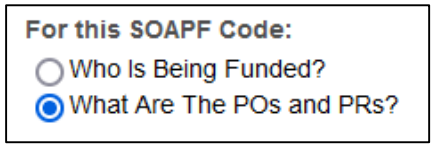
Accessed on the left side using “Report Selectors”

- “These are secondary reports found in:

Award Detail

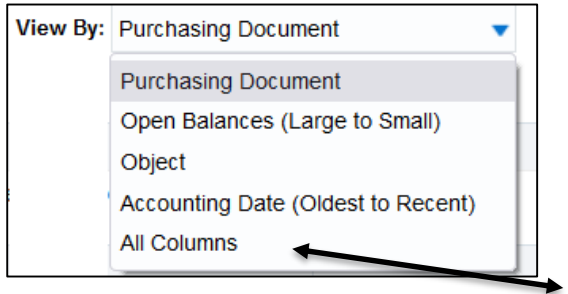


Budget to Actuals

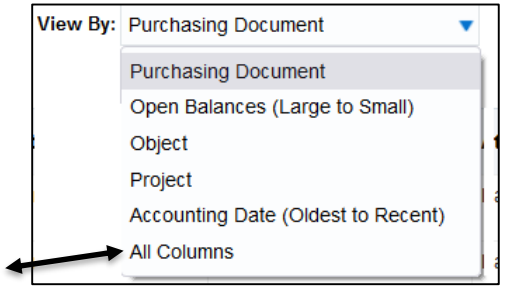


- Enjoy the “View(s)”

5 “View By” in Budget to Actuals Details



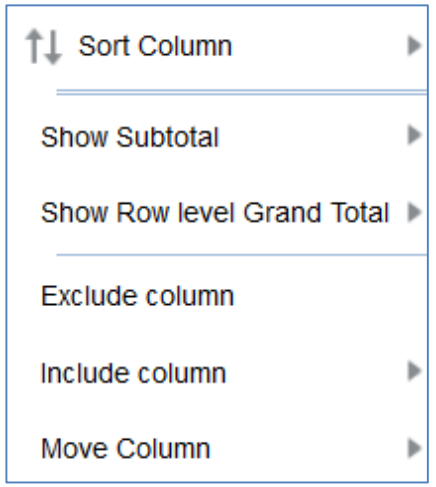
6 in Award Details



“All Columns” is Transaction Union Details! 56 columns

R50 Tips/Techniques Cont.

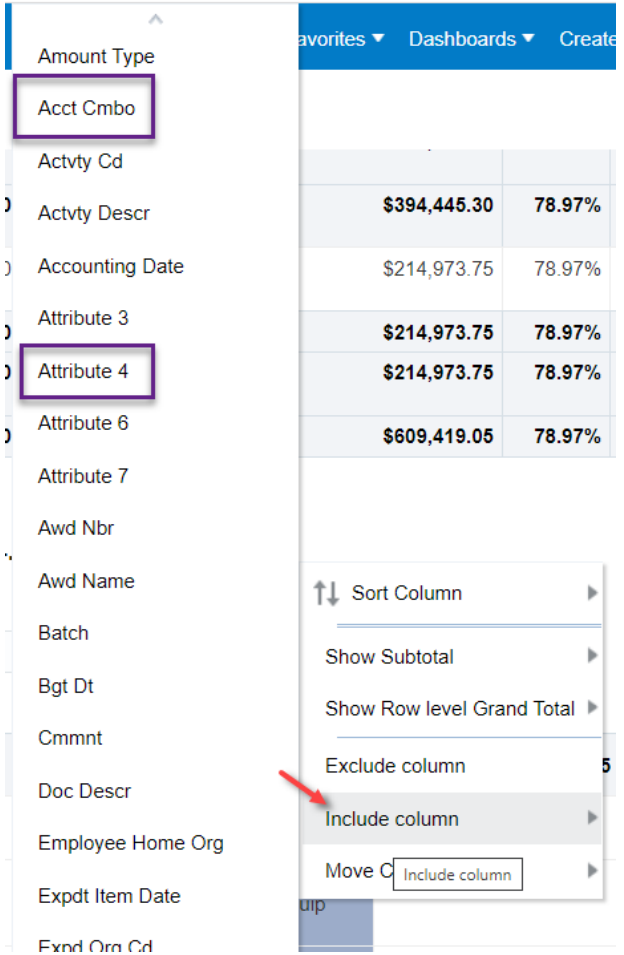
- **Right Click** (RC) to Include other columns
- **RC and Move to Prompts** to reduce “clutter”
- **RC and Move to Sections** to have one long list broken down by sections – no need to click the double headed blue arrow to expand the list



- Use the Encumbrances Cheat Sheet for R50 column definitions

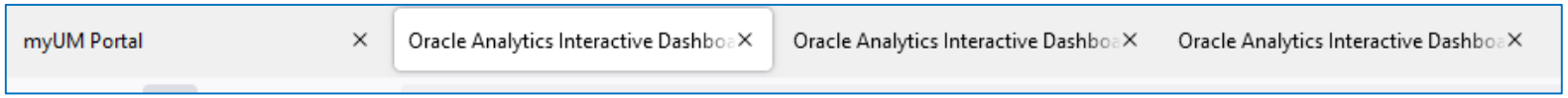
R50 Tips/Techniques Cont.

- Use the Encumbrances Cheat Sheet for R50 column definitions
- Examples of Columns you may wish to include are:
  - ✓ Account Combo = OSOAPFUFI
  - ✓ Attribute 4 = Req #
  - ✓ Attribute 6 = Invoice Paid (Y)
  - ✓ Attribute 7 = Posted Pay Period End Date

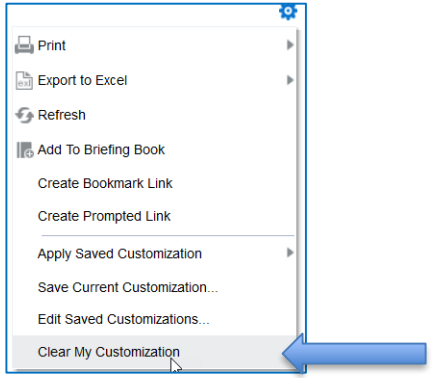


Misc Tips/Troubleshooting

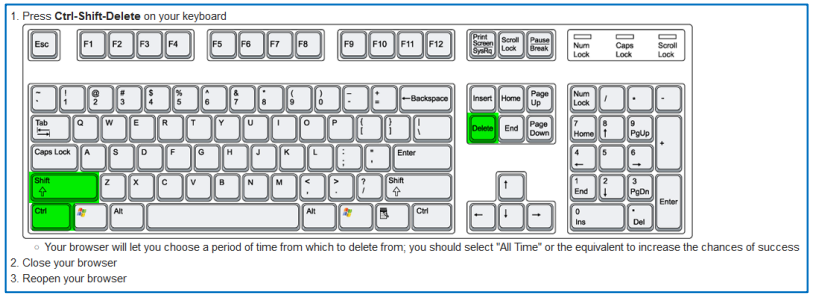
- Use **Control + Page Up** or **Page Down** to manually move from one ***browser tab*** to another *(Edge, Chrome, Firefox)*



- **Clear Customizations** to begin a brand new report or to start over – also helpful if the spinner doesn't stop!



- **Clear Cache Daily** – use Control + Shift + Del
  - Also, clear cache, close and reopen browser is helpful!



Misc Tips/Troubleshooting Cont.

- Have **more than one** Analytics session open
- **Copy/Paste columns** from Analytics to Excel (select one column at a time or use Shift + Click to select multiple columns)
- Dashboard Prompt "**Search**" Tip – copy paste a SOAPF or Award number instead of typing
- **Save Customization** Tip – type an existing report name in the Save section to "Replace" the report (update) with the same name ("yes" to replace)
- Any Requisitions with **leading zeros** were "converted" at Go-Live (so they begin with zeros)
  - Example: 0000043670 – all others begin with a "1" (1000000762)
- **Leverage Quantum Financials "Campus Reports"** (e.g. QFN129 Project SOAPF Combo; QFN130 Pcard Transactions, and more!)

New Reports in Sponsored Dashboard

SPP 7062 Activity

Displays all study participant payment (SPP) activity processed through Object 7062 (Cash Study Participant Pay), including the initial issuance of the working fund check and the debit memo charges to Object 3125 (Participant Study Pay Group) reflecting distributions to participants. Drillable to NONPO invoice and debit memo details.

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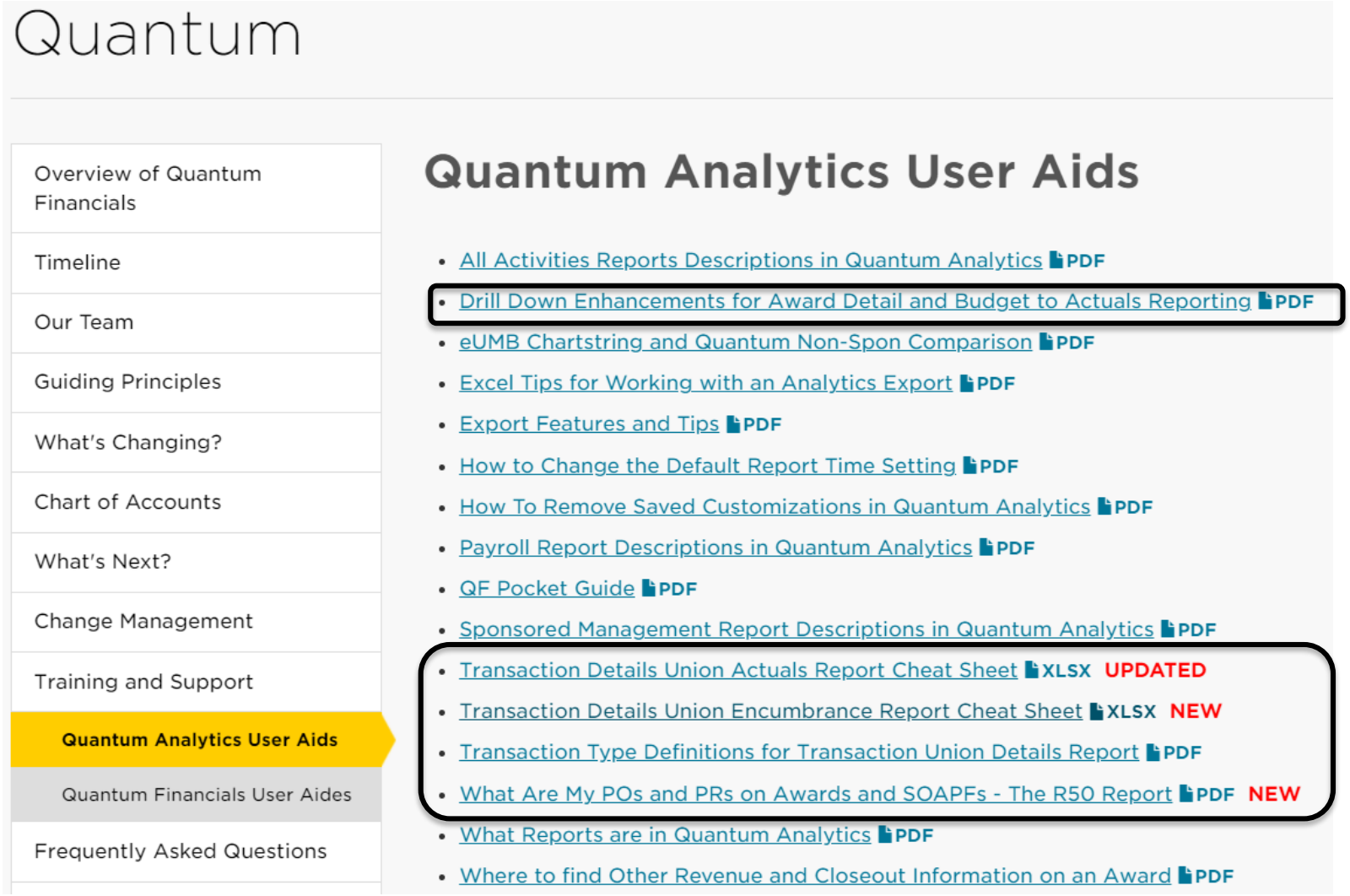
Transaction Union Detail Tips

- **Now includes** Actuals, Encumbrances, and Both reports
- Use a **minimum number** of Dashboard Prompts
  - Fiscal Year Prompts; Award, Project, SOAPF – then apply
- When the report opens, **RC on Transaction Type** and
  - Apply Subtotals
  - Move to Prompts
  - Move to “Sections
- When you **Move** to columns, it always lands in the left most column in the dataset (the report)

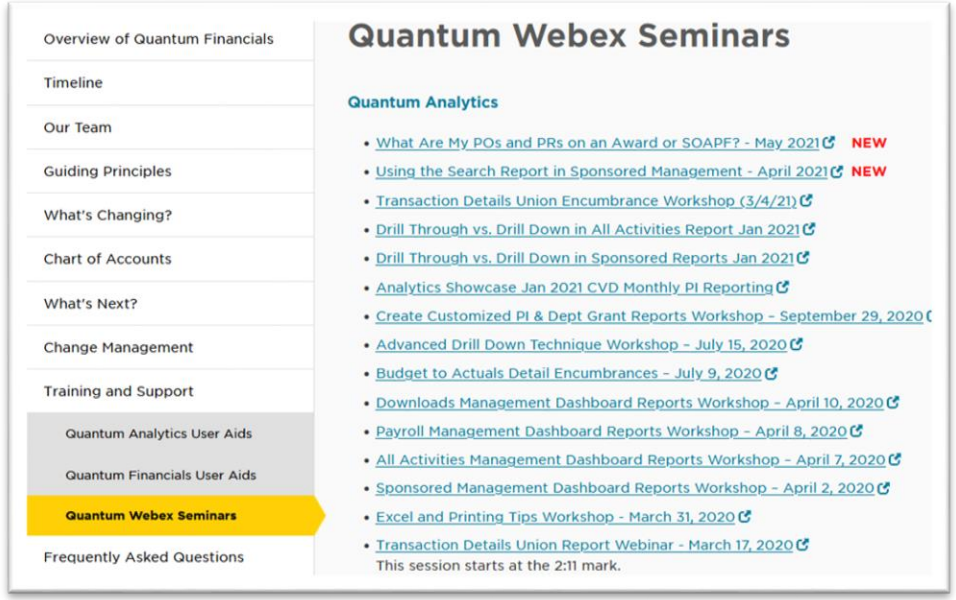
Recommended User Aids



WebEx Recordings for Move To Prompts

To review the Move to Prompts technique:

- Minute 31:40 in the *Transaction Details Union Encumbrance Workshop (3/4/21)* WebEx recording
- Minute 30:09 in the *What Are My POs and PRs on an Award or SOAPF? - May 2021* WebEx recording



Resources

Quantum Help Desk email submissions to: help@umaryland.edu

Code Definitions

- ✓ OSAOPFUFI (Segment) Names and Definitions
- ✓ Source (Fund) Values, Descriptions and Definitions
- ✓ Function Values, Descriptions and Definitions
- ✓ Object (Acct) Expense Accounts list
- ✓ Object (Acct) Revenue Accounts list
- ✓ Balance Sheet Accounts
- ✓ Departments (Org) Definitions – use

in Campus Reports in Quantum Financials (log in and select Campus Reports icon)

Quantum Non-Sponsored Accounting String

(Former eUMB Chartstring)

SOAPF = eUMB PROJECT ID								
O	**S**	**O**	**A**	**P**	**F**	**U**	**F**	**I**
Object (Acct)	**Source** (Fund)	**Organization** (Owner Dept)	**Activity** *NEW*	**Purpose** *NEW*	**Function** (Program)	**Unit** (GLBU)	**Future** *TBD*	**Interfund** *(Crossing Funds)*
xxxx	xxx	xxxxxxxx	xxxxxx	xxxxxxxx	xxx	xx	xxxxx	xxx

Questions

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