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Focus on PCard—Reminders, Suggestions, Notifications

How to Prepare for a Cardholder Leaving

When a cardholder terminates employment in your department, their PCard must be canceled and returned to SSAS. A best practice suggestion is for the cardholder to stop making new purchases and that activity be transferred to another cardholder as soon as they announce their resignation to minimize transactions that may get processed after the card is canceled. Before leaving, the cardholder must make all their outstanding purchase documentation available to their authorized reviewer. The authorized reviewer is responsible for making sure the final reconciliation and reallocation is completed, if not done by the cardholder, which may require setting up a reallocation delegate. Any automatically recurring charges must be canceled and moved to a different PCard. The PCard transaction report is a helpful tool for identifying any outstanding cardholder activity.

Attachments Reminder

When reallocating PCard transactions, remember to include all supporting documentation as attachments. A best practice suggestion is to include documents supporting each transaction at the line item level and, on at least one expense report each month, include the transaction log and Visa statement at the header level. Instructions for how to include attachments can be found in the UPK tutorial for [Reallocating and Approving PCard Transactions](#).

Quantum PCard Bug Notification

Earlier this month, cardholders and authorized reviewers were notified that the Quantum PCard reallocation process was experiencing an issue causing account combo distributions entered by reallocators to revert back to the default account combo after review by the approver. This bug is only affecting reallocations to account combos, not to projects, and only occurs after the approver opens the expense item details page to view the reallocation distribution. The fix for this bug is included in the Quantum Financials upgrade being absorbed this weekend. Since this may have been happening since late November 2020, you should review the PCard Transaction Report to identify expense reports that contain items charged to your default account combo in error, and process a debit memo to correct them.

Role Validation

The annual validation of security roles held in both Quantum Financials and eUMB HRMS is currently underway. Notifications are being sent to Administrative Deans, Department Administrators or Directors with instructions for how to run the reports of security roles, validate the employees and roles, use DocuSign to sign the certification statement, and send the reports to rolevalidation@umaryland.edu. Signed reports are due back by March 19th.



Using CBS for Foundation Billing

There is a new process for billing the UMB and USM Foundations that will require you to use the Customer Billing System (CBS). If you are responsible for such billings, join the campus wide WebEx presentation to learn more about this important change on Thursday, February 18, 2021 from 2:00 - 3:30 PM. Register [here](#).



Upgrades to Quantum Analytics & Quantum Financials

The Quantum support team has been busy over the past few weeks preparing for upgrades to both Quantum Analytics (QA) and Quantum Financials (QF). Users are reminded to refrain from accessing the system when any upgrade is in process and to clear cache and customizations as you begin to use either system again after any upgrades so that you are viewing the most up-to-date screens.

Quantum Analytics

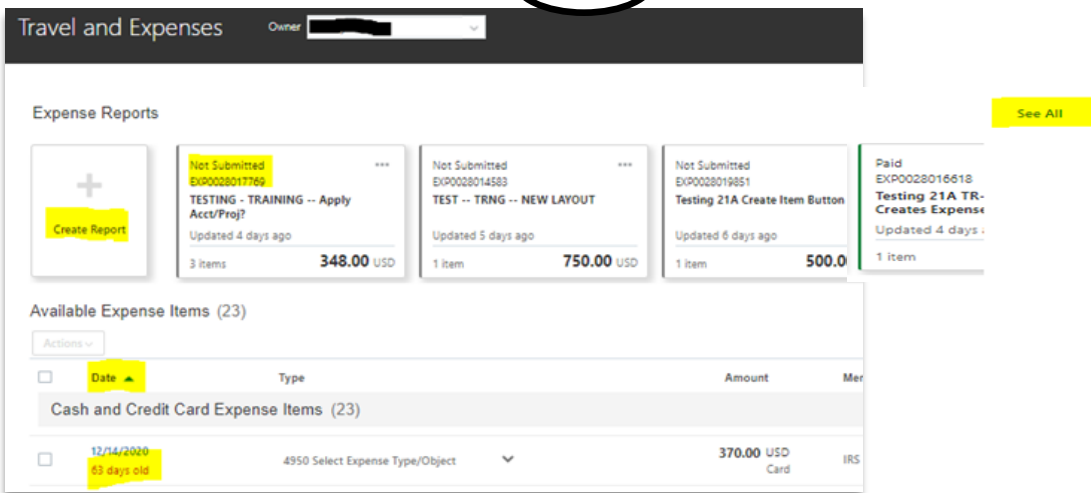
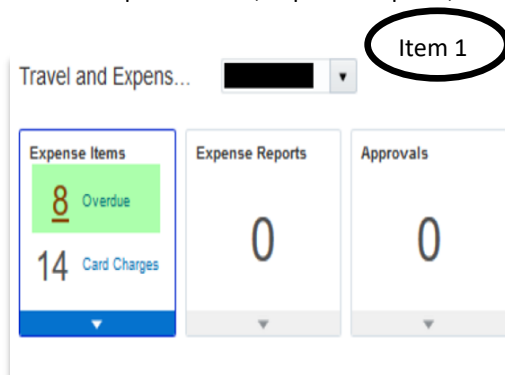
The QA upgrade was completed and made available to system users as of February 1st. Users should not have noticed significant changes to their system experience from this upgrade. Be aware that notifications of when an upgrade will be in process are posted on the QA landing page and the IT alerts section of the myUMB Portal. If you usually enter QA from a bookmark and bypass the landing page, you may miss these important notifications.

Quantum Financials

The QF upgrade will be absorbed this weekend. The system will be unavailable from 10 PM Friday 2/19 thru 3 PM Saturday 2/20. After that time, users should be able to log in and experience the updated environment. One change all users will notice is that certain unused icons have been removed from the landing page and other sub-menus to streamline the user experience. These icons were delivered as part of the system, but were not being used as part of UMB's configuration.

Testing has identified some significant changes to the user experience on the Expenses pages used for PCard reallocation. Most notably, the three infotiles for Expense Items, Expense Reports, and Approvals have been removed (Item 1).

The page now has a larger Create Report button and each expense report with its status is reflected either as its own infotile or by selecting the See All option along the right margin that provides a list view of all expense reports or items (Item 2). Unfortunately, with the removal of the Expense Items infotile, the Overdue expense items are not as visible. A best practice suggestion is to bring all Overdue items to the top of the expense items list by sorting the Date column by oldest first.



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](#).



Org and Object Hierarchies Now Available as Campus Reports

The Org and Object hierarchies have been added to the Campus Reports selections in Quantum Financials. These reports were previously available only as static Excel documents maintained on the Chart of Accounts page of the Quantum website. The new hierarchy reports allow users to choose how to run them using the Parent level prompts. To obtain the entire hierarchy, no changes to the prompts are necessary. To limit the results to a specific hierarchy group, complete the prompts starting with the highest Parent level, moving to lower levels from left to right. The static Excel documents will be removed from the Quantum website.



Changes to Rudolph's Punch-Out Site

Rudolph's Office Supply is updating their punch-out website. Users who purchase from Rudolph's using the punch-out feature on the Requisition screen should **complete any orders by February 22nd and refrain from using the punch-out option through February 26th**. If you need to purchase from Rudolph's during this week, you can still use your PCard to purchase directly or submit a normal non-catalog requisition. The new punch-out site should be operational by March 1st.

Facility Impact Review for Certain Equipment Purchases

Certain purchases may directly or indirectly impact the facilities in which the equipment will be installed or operated. It is important to identify any potential facility impact in the planning stages of such a purchase so that those needs can be assessed and addressed before equipment is purchased and installed. Some examples include equipment that require electrical upgrades, plumbing changes, structural modifications or modifications to life safety systems in order to install and operate the equipment properly. **SSAS and Facilities & Operations have partnered to implement a Facility Impact Review Process for these types of equipment purchases to decrease risk and identify any potential facility impact.** Requisitions submitted for items that may have a facility impact will be reviewed through this process. You can find more information on the SSAS home page at the "Facility Impact Review for Certain Equipment Purchases" link in the Quick Links box, or you can access the document [directly](#).

PO Close email Reminder

In the December [issue](#) of Quantum Bytes, SSAS introduced a New PO Close email Address, PO_Close@umaryland.edu, to streamline requests to close Purchase Orders. The new process is working well. SSAS reminds you to **include both the PO number and supplier name in your requests**. The supplier name is required to ensure that the correct PO is closed.

Keep Clearing Abandoned Requisitions From Your Workflow List...

... so they don't artificially inflate encumbrances in the Project commitment records. Steps for clearing requisitions returned by buyer or rejected by approver can be found on the Quantum [website](#) and a [UPK tutorial](#) is available to help you.

Requestor Field Removed from Invoice Header

On invoicing screens used in Debit Memos and NONPO Invoicing, the Requestor field in the header section has been removed. This field was not supposed to be used, because entering data in that field caused Workflow routing errors. Quantum Debit Memo and NONPO Invoice Initiators, as well as approvers on these transactions, may notice this change.

Customer Billing Reminder—When creating customer bills, remember the memo line, indicating which revenue account will receive the payment from the customer, is a required field. An error message will appear if not entered.



Quantum Analytics Notes

Award Detail report Includes Direct Costs Total

Users of the Award Detail page will notice that a line for Total Direct Costs has been added to the QA4.P4.R10 report. You will no longer need to add the MTDC and Non-MTDC totals for Direct Costs together to get Total Direct Costs.

What is the Budget to Costs and Commitments Summary for this Award/Project? (QA4.P4.R10)
Time run: 2/15/2021 8:17:24 PM

By Object

| Object Level B | Cost Structure | Object Level C | Period Activity Amount | Budget | LTD Costs | Raw Commitments |
|----------------------------------|-----------------------|-------------------------|------------------------|------------------------|------------------------|-----------------------|
| B100-Direct Costs | MTDC | C100-Salaries | \$72,443.79 | \$4,256,560.70 | \$5,456,777.31 | \$721,239.92 |
| | | C200-Fringe Benefits | \$18,182.43 | \$1,189,723.00 | \$1,590,662.66 | \$184,097.94 |
| | | C300-Operating Expenses | \$51,157.69 | \$888,908.60 | \$2,075,638.01 | \$112,538.00 |
| | | CE01-Direct Costs | \$0.00 | \$686,244.46 | \$0.00 | \$0.00 |
| | MTDC Total | | \$141,783.91 | \$7,021,436.76 | \$9,123,077.98 | \$1,017,875.86 |
| | Non-MTDC | C300-Operating Expenses | \$0.00 | \$4,398,178.98 | \$159,456.95 | \$153,669.00 |
| | Non-MTDC Total | | \$0.00 | \$4,398,178.98 | \$159,456.95 | \$153,669.00 |
| B100-Direct Costs Total | | | \$141,783.91 | \$11,419,615.74 | \$9,282,534.93 | \$1,171,544.86 |
| B600-Indirect Costs | F&A | C600-Indirect Costs | \$68,898.40 | \$5,576,119.24 | \$4,708,463.70 | \$0.00 |
| | F&A Total | | \$68,898.40 | \$5,576,119.24 | \$4,708,463.70 | \$0.00 |
| B600-Indirect Costs Total | | | \$68,898.40 | \$5,576,119.24 | \$4,708,463.70 | \$0.00 |
| Total Costs | | | \$210,682.31 | \$16,995,734.98 | \$13,990,998.63 | \$1,171,544.86 |

Analyze - Refresh - Print - Export

Transaction Details Union with Encumbrance Reporting

The Quantum Analytics Transaction Details Union report with enhancements for encumbrance reporting functionality is going through its final testing stages and is expected to be available under the Downloads Management dashboard as of March 1st. Training on the new report is scheduled to begin on February 24th and 25th. See the Analytics training schedule on page 5.

Remember – new SOAPF combos will show in Quantum Analytics *only* after they have been created *and* there is some activity posted to them.

Newly Published Recorded Webinars

Several recent Quantum Analytics webinars were recorded and are now posted to the Quantum WebEx Seminars [page](#). Look for the three new sessions from January 2021 and be sure to check out the workshops - *Create Customized PI & Dept Grant Reports* and *Advanced Drill-Down Techniques*. They have received great reviews!

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. You can register either via the [financial calendar](#) or the [training registration database](#).

The February **Quantum Financials** classes include:

| Quantum Financials Course Name | Date/Time |
|--|-----------------------------------|
| Intro to Quantum | Mon, Feb 22 – 10:30 AM – 12:00 PM |
| Searching for NONPO Suppliers | Wed, Feb 24 – 9:00 AM – 10:30 AM |
| Using NONPO Invoicing for Check Requests | Wed, Feb 24 – 1:00 PM – 4:00 PM |
| Creating Customer Billing and Recording Disputes | Thu, Feb 25 – 9:00 AM – 12:00 PM |
| Creating & Approving Requisitions | Thu, Feb 25 – 1:00 PM – 4:00 PM |
| Receiving Orders | Fri, Feb 26 – 9:00 AM – 10:00 AM |
| Using Debit Memos for Accounting Transfers | Fri, Feb 26 – 1:00 PM – 4:00 PM |
| Reallocating & Approving Procurement Card Transactions | Wed, Mar 3 - 9:00 AM – 12:00 PM |

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

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 February/March **Quantum Analytics** classes include:

| Quantum Analytics Course Name | Date/Time |
|---|----------------------------------|
| Transaction Detail Union Encumbrance Reports Workshop | Wed, Feb 24 – 2:00 PM – 3:00 PM |
| Transaction Detail Union Encumbrance Reports Workshop | Thu, Feb 25 – 9:00 AM – 11:00 AM |
| Transaction Detail Union Encumbrance Reports Workshop | Thu, Mar 4 – 10:00 AM – 11:00 AM |
| Payroll Management Dashboard Intro | Wed, Mar 17 - 9:00 AM – 11:00 AM |
| All Activities Dashboard Intro | Tue, Mar 23 – 9:00 AM – 11:00 AM |
| Sponsored Management Dashboard Intro | Wed, Mar 24 – 9:00 AM – 11:00 AM |

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-BF Financial Systems](#). We're looking forward to seeing you soon!

Are you ready to share what you like about Quantum Analytics and which reports help you get your work done? The Quantum Training Team is always looking for new Analytics Showcase topics and presenters. Reach out to Buzz with your contact information at [DL-BF Financial Systems](#).

