March 16, 2020

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Transaction Details Union Report Is Now Available

The Quantum support team has developed and rolled out a new version of the transaction details download report on the Quantum Analytics Download Management dashboard. The **Transaction Details Union Report** presents total transaction details in one report, not separated by transaction type, and includes many new attributes that were not part of the original Transaction Details Report. The original version will remain through the end of March while users are transitioning to the new report, and will then be fully replaced with the new Union version. All data and download capabilities that existed with the previous version have been replicated with the Union version. The support team will continue to develop and roll out additional enhancements to the report.

There will be two WebEx workshops to help acclimate you to this new report, hosted by Buzz Merrick on Tuesday, March 17th from 11 am – 12 pm and from 2 pm to 3 pm. The same information will be covered during each workshop, so you only need to attend once. You will be able to access the WebEx workshop by navigating to the following URL:

https://umaryland.webex.com/meet/lquell

Join by phone

+1-415-655-0001 US Toll

Access code: 732 868 109

Quantum Training Notes

The Quantum Training Team is in the process of moving all in-person sessions to WebEx delivery in response to the COVID-19 instructions for teleworking and social distancing. Instructors are fine-tuning plans and rearranging schedules to team the instructor with someone who will respond to session attendees in Chat. In addition, they are updating tutorials, adjusting instructor-led and self-study content, creating knowledge checks to keep things a bit more interactive and practicing delivery over WebEx. Be on the lookout for revised training dates and instructions for registering and attending the WebEx sessions.

As the Training team updates the Quantum UPK tutorials, they are adding the "last updated" date so users can be sure they are working from the most recent versions. If you previously printed any of the tutorials, be sure to check the Quantum UPK site to make sure you are working from the most up-to-date versions.

New SOAPF Requests and Object 7062

If you are requesting a new SOAPF that will need to use Object 7062 – Cash-Study Participant Pay, you must send that request via email to Financial Systems so that the proper account combo can be set up. By default, 7062 is not added as a potential object for every SOAPF unless it is specifically requested.

New SOAPF Reports

Two new reports have been developed and rolled out for users to look up their SOAPFs. The reports can be found under the newly created Campus Reports icon on your Quantum Financials home page. The SOAPF Combo Report will provide all account combos related to the SOAPF segment(s) you enter in the prompts. The Project SOAPF Combo Report will give you the account combos related to the Award, Project and/or Org you enter in the prompts. As additional user reports are developed, they will be added here for your self-serve access.

Month End Close

The updated Financials Calendar has been posted in the eUMB News section of the Portal page. You can still find the notification of month end closing under Employee News on your Quantum Financials home page too.
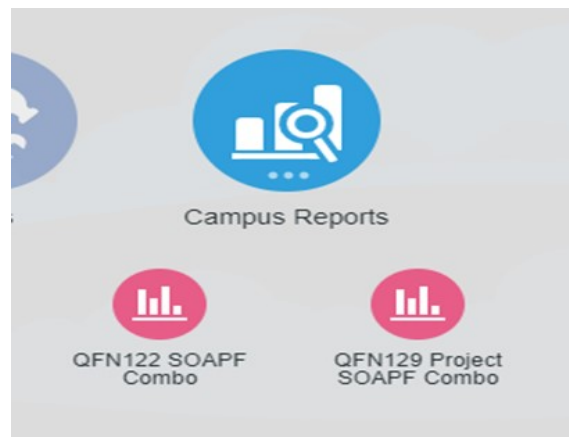
Requisition Basics – Amount or Quantity?

When completing a requisition for a purchase that has multiple lines or that will include freight charges, please be mindful of how the Item Type is addressed on each line. Item Type refers to whether the Goods or Services will be billed by Quantity or Amount. Remember that freight must always be categorized as an **Amount** and not a Quantity!

Debit Memo Approval Reminder

When approving debit memos, approvers should pay particular attention to both the Project ID selected and the Org to which the debit memo will be routed for approval. The routing does not automatically derive from the Project ID, so it is possible to mistakenly charge another department's Project without that department being involved in the approval. The Quantum Org hierarchy can be found on the Chart of Accounts page on the Quantum Financials website.

PCard Troubleshooting

As many PCard holders, delegates, and approvers are aware, there are still several issues with getting all PCard transactions properly reallocated in Quantum Financials and posted through to Quantum Analytics. Please be assured that the Quantum support team is actively working with Oracle to identify solutions to get all PCard expense items to properly display for reallocation and approval, as well as approved PCard expense reports to properly post to Quantum Analytics for your reporting needs.

We reported in the prior issue of Quantum Bytes about one solution that was successful in getting many PCard expense reports posted to Quantum Analytics. The reallocation tips in that same newsletter offered suggestions to keep future PCard expense reports that contain reallocations to grants that have ended, from getting stuck in the same status. The Quantum support team has also developed a monitoring report that will be run at least weekly to identify any new approved PCard expense reports that failed to post to Quantum Analytics, so that the same solution can be applied. Therefore, if you do not see the transactions from all of your approved PCard expense reports in the Transaction Details report in Quantum Analytics within a week from when the expense report was approved, please submit a request for assistance to help@umaryland.edu.

PCard Overdue Expense Items

The Expense Module in Quantum Financials requires overdue (i.e., >60 days) expense items to be added to an expense report and submitted for approval before you can submit more current items. You can find your overdue items by clicking on the Overdue hyperlink in the Expense Items infotile on the Expenses page (i.e., where you create expense reports).
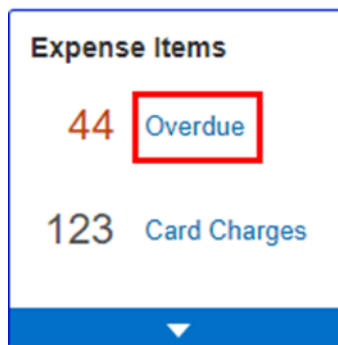
Tips and Reminders

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.

Hierarchies

You can find the Quantum Org and Quantum Object hierarchies on the Chart of Accounts page on the Quantum Financials website.

Please continue to send your questions about using or getting results from Quantum Financials or Quantum Analytics to help@umaryland.edu. Unfortunately, while our limited resources are focused on clearing help desk tickets we are not able to actively monitor quantumfinancials@umaryland.edu so requests sent there will not be answered as timely. Please do not send your question to both addresses as that will cause duplication of efforts. We apologize for the delays and are doing our best to help you.