



July 21, 2020



UNIVERSITY of MARYLAND  
BALTIMORE

Volume 8, Issue 1

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

[Previous Quantum Bytes Issues](#)

## 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](mailto:quantumfinancials@umaryland.edu) with **Focus on PCard** in the subject line.

## PCard Reallocation Reminder

When all PCards are requested, the requester must provide a default GL Account Combo to Strategic Sourcing and Acquisition Services (SSAS). SSAS enters the default combo into Quantum Financials as part of the card set up. When any PCard transactions are left unallocated by the end of the next billing cycle, those transactions are accrued by charging them to the default combo. The accrual is reversed at the beginning of the next month so that the items are available for reallocation to the appropriate GL Account Combo or Project.

It is important to check for accrued PCard expense items at least monthly, to identify those that require your attention. They could be items waiting to be reallocated and added to expense reports, or items that have been included on expense reports that are waiting for approval. Either the PCard Transactions Report (available under the Campus Reports icon on the Quantum Financials landing page) or the Transaction Details Union Report (available on the Downloads Dashboard in Quantum Analytics) can be used to help identify these items.

Until PCard expense items are reallocated, the charges will not be reflected in any Projects on Award Details Reports or GL Account Combos (other than the default) on Budget to Actuals Detail Reports in Quantum Analytics.

## 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.

## PCard Expenses – Transaction Details Union Report Tip

Quantum Analytics users who check the Transaction Details Union Report for your PCard Expenses should use the Fiscal Period Beg and End prompts instead of searching by specific Accounting Dates to ensure you get the entire month's transactions. The Accounting Date for PCard expense reports defaults to the first of the month, regardless of which day the report was actually processed.

## Direct Retros Reminder

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.



## Quantum Analytics – Encumbrances

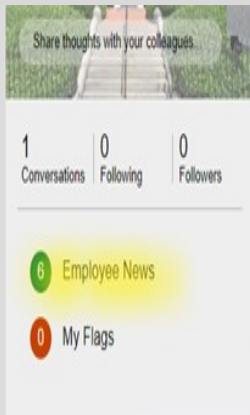
The Quantum Analytics Support Team was made aware of discrepancies in operating expense encumbrances (not salaries and fringe) in both the Budget to Actuals and Award Details Reports. Specifically, the results that returned from the report prompts did not always agree with the results that returned from the “*What are the POs and PRs?*” radio button selector for the same SOAPF or Award. Since being notified of the discrepancies, the support team has identified and resolved the issues for the Budget to Actuals Details Report and also rolled out some additional report view functionality. A webinar was provided on July 9<sup>th</sup> to demonstrate the enhancements. The recording can be viewed from the Quantum [website](#). While the team is still working to identify all of the issues causing the operating expense encumbrance discrepancies for Projects on the Award Details Reports, be aware that those balances may be inaccurate. We will keep you informed as progress is made.

## Clearing Requisitions

While researching the causes of discrepancies in the encumbrance balances on the Award Details Report, the Quantum Analytics Support Team has identified a new business process for Clearing Requisitions that must be regularly completed. 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. It has been discovered that these unused requisitions are artificially inflating encumbrances in the Project commitment records and need to be cleared from the 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, please complete the steps as soon as possible so the support team can continue working to identify the remaining Project commitment discrepancies.

### New Calendar

The updated version of the financial calendar can now be accessed via Employee News on the Quantum Financials landing page. The calendar will continue to be updated with important processing deadlines and training dates, so be sure to check back often.




## Quick Tip: Don't Default that Customization

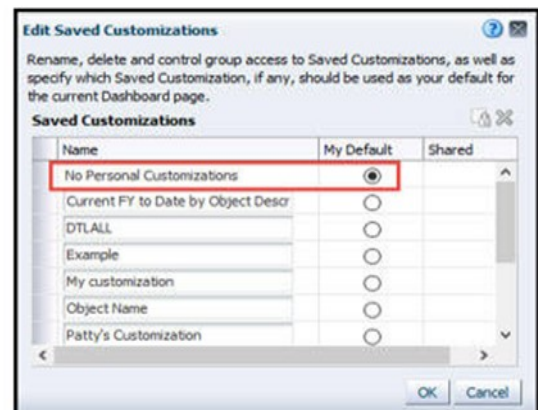
Customizations can be a great time saver within Quantum Analytics but defaulting a customization—meaning that the customization will appear as soon as you bring up the dashboard - can cause you some problems.

Specifically, if you have a customization set as your default and Quantum Analytics receives an update that affects the dashboard on which your customization is saved, your dashboard will not render with the most up-to-date data. Another known issue with setting a customization as your default is that new bookmark links may not work because of the default customization.

Therefore, our best practice suggestion is to remove the customization from being a default and instead apply the customization each time you run the report. To remove default customizations:

1. Click on the Gear  in the upper right corner and select Edit Saved Customizations.
2. Click the radio button for No Personal Customizations.
3. Click OK at the bottom of the page.

You will still have saved customizations, but none will be set as the default.



## Quantum Training Continues Online

The Quantum Training Team has developed select course content to be delivered live over WebEx or Zoom in 3 hours or less, including time for your questions. Classes are designed to introduce new users to Quantum Financials and Analytics, but existing users are welcome to join in for a refresher. If you have questions on which courses are necessary for your access, please email the Quantum Training Team at [fssystems@umaryland.edu](mailto:fssystems@umaryland.edu). We're looking forward to seeing you soon!

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
Using Debit Memos for Accounting Transfers	Thu, July 23rd - 9 am - 12 pm
Reallocating & Approving Procurement Card Transactions	Mon, July 27th - 9 am – 11:30 pm
Searching for NONPO Suppliers	Tue, July 28th – 2 pm – 3:30 pm
Creating Customer Billing and Recording Disputes	Wed, July 29th - 9 am - 12 pm
Using NONPO Invoices for Check Requests	Thu, July 30th – 1:30 pm – 4:30 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
Open Forum for Sponsored Reporting Workshop	Thu, July 23rd - 9 am - 10 am
Intro to All Activities Dashboard	Tue, July 28th - 9 am - 11 am
Intro to Awards Dashboard	Wed, July 29th - 9 am - 11 am
Topic - TBA	Thu, Aug 6th – 9 am – 10 am
Topic – TBA	Wed, Aug 19th – 9 am – 10 am
Topic – TBA	Tue, Aug 25th – 9 am – 10 am
Topic – TBA	Thu, Aug 27th – 9 am – 10 am

*Note: The August Quantum Analytics 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](mailto:fssystems@umaryland.edu).*

## UPK Tutorials For New Campus Reports

Several new reports are available under the Campus Reports icon in Quantum Financials and have been featured in recent issues of Quantum Bytes. The training team will be releasing companion UPK tutorials soon.

