



July 28, 2021



UNIVERSITY of MARYLAND
BALTIMORE

Volume 20, Issue 1

PCard Reminders, Suggestions, Notifications

PCard Closeout Process – When a cardholder leaves UMB or the Department

A new resource has been added to the Strategic Sourcing and Acquisition Services website to guide cardholders and their authorized reviewers through the process of closing out a PCard. When the cardholder announces they are leaving the department and/or UMB, they should be directed to the PCard Closeout Process document to use as a step by step guide. Following the suggested steps and best practices will help ensure a seamless transition and minimize the need for time consuming cleanup efforts. The guide can be found under [Quick Links](#) on the SSAS Corporate Purchasing Card page or directly at [The PCard Closeout Process](#).

Inside this issue:

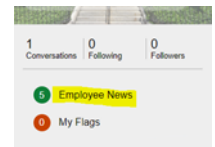
- | | Pg. |
|--|------------|
| • PCard Closeout Process | 1 |
| • Quantum Financials FY 21 Year End Close | 1 |
| • Global Search on QF Home Page | 1 |
| • NONPO Invoice Documentation Submitted Electronically | 2 |
| • New QA Seminars, User Aids, Workshops | 2 |
| • Clear Your Cache Every Day!! | 2 |
| • Important Reminders | 2 |
| • Quantum Training Schedule | 3 |

Quantum Financials Notes



FY 21 Year End Close

The FY 21 year end close was completed July 26. Remember that you can find the dates of each monthly close under Employee News (inside the Quantum Financials application) and on the Quantum Financial Calendar at <https://cf.umaryland.edu/calendar/quantum/>



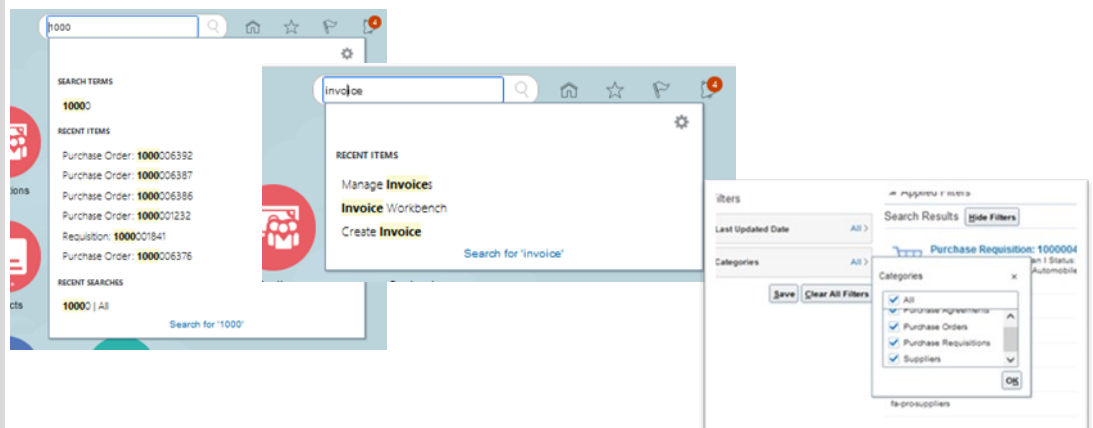
Global Search feature on QF Home Page

Global Search is a new feature on the QF Home Page allowing users to quickly search for procurement documents. A search bar in the top right-hand corner of the screen is now available!



You can select category filters and search for a specific supplier, requisition, or PO. The search can also be used to quickly navigate to a screen or dashboard. If you click the “Search for” hyperlink that appears at the bottom of the results you can open a more detailed search, including date last updated and a dropdown of various document categories. Search by “Manage Invoices” takes you to the Manage Invoice page. Select All Categories Filter to see document choices. More areas are being added to the search function each quarter so be on the lookout for enhancements!

Quantum Bytes is taking a break in August. Look for the next issue on September 15th.



[Previous Quantum Bytes Issues](#)



Remember

PO Close email

The PO Close email PO_Close@umaryland.edu was created to streamline requests to close Purchase Orders. When you require a PO to be closed, please follow the SSAS guidelines: send an email to the PO Close email address and use the Subject line "Close PO#XXXXXXXX". In the body of the email provide the PO# and Supplier name. If you are sending multiple PO's in one email, use in the subject line "Close multiple PO's" and list each PO# and Supplier name in the body of the email. SSAS will send a confirmation email once the PO's are closed.

Don't Default Customizations

Saving customizations in Quantum Analytics can be a time saver, but remember the best practice suggestions is to NOT set them up as a default. See the July 2020 [issue](#) of Quantum Bytes for more information about why.

NONPO Invoice Documentation Will Continue to Be Submitted Electronically

Under the modified procedures for completing NONPO invoices while teleworking, the Office of the Controller – Disbursements allowed documentation to be submitted electronically, via the secure file transfer protocol. The State mandates most of the requirements we have to follow for invoice processing and will now accept documents electronically that they previously required to be delivered in hard copies to Annapolis. Therefore, although department staff are beginning to return to campus, you will not have to revert back to carrying hard copies to the Disbursements office for your NONPO invoices. Remember to submit your documentation to the NONPO email inbox via SecureXfer only **AFTER** it has been approved in your department. Documentation files are only stored in SecureXfer for up to 14 days and then automatically deleted from the system.

Quantum Analytics Notes

New Quantum Analytics WebEx Seminars, User Aids, and Workshops

The Training and Support page on the Quantum website has been updated to include new [WebEx Seminars](#) and [User Aids](#). The following workshops are upcoming In September. Please check the Quantum Financials Calendar for scheduled dates and times.

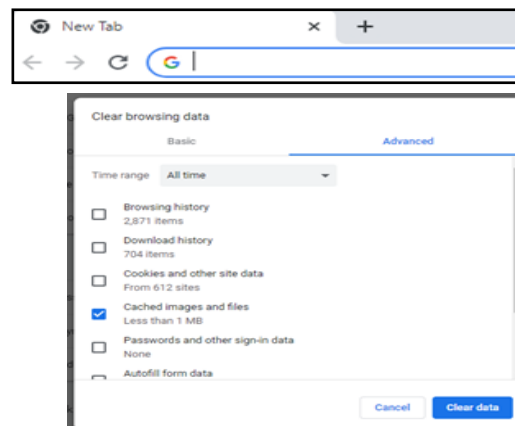
The new WebEx seminar for Quantum Analytics [Tips, Tricks & Troubleshooting](#) is a 90-minute workshop focused on providing Analytics users an array of user-friendly tips, tricks, and techniques that will save you time and effort! Tips such as: keyboard and mouse shortcuts; ways to reduce report "clutter"; using report "Views" and filters to greater advantage; drilling on columns or rows vs. numbers; report hyperlinks; learning resources and more. We'll also delve into troubleshooting techniques that will help you select, design, and leverage your Analytic reports with less frustration and greater understanding. Techniques such as when to use Clear Customizations vs. Clear Cache; which user aid(s) can best meet your needs; which report(s) answer my exact question? Advance registration is not required. WebEx room information will be sent via Gentle Reminder email prior to the course.

[Actuals & Encumbrances in Transaction Detail Union Reports](#) is a new workshop available for Quantum Analytics users. This 90-minute workshop introduces you to the broad range of reporting available in the Transaction Details Union reports and the User Aid "Cheat Sheets" designed to speed your reporting. You will learn how to run, save, and export transaction detail reports for Actuals, Encumbrances, and/or both. We will review in detail, both Transaction Details Union Report "Cheat Sheets" (Excel documents) - one for Actuals and one for Encumbrances. These User Aids will provide you with a greater understanding of the columns of data that appear in each report. Advance registration is not required. WebEx room information will be sent via Gentle Reminder email prior to the course.

Clear Your Cache Every Day!!

Best practice suggestion is to clear your browser cache every day as part of signing into Quantum. Instructions can be found on the [CITS Webpage](#). A visual guide is provided to help users with the process. When you open your browser press the Control/Shift/Delete buttons together and this opens the Settings box to clear browsing data. Select the Advanced tab.

Choose the Time Range of All Time and the Cashed Images and files box and click on the blue "Clear data" button and close the Setting tab. Close your browser and then reopen it. You are all done!



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 **August Quantum Financials** training classes include:

Quantum Financials Course Name	Date/Time
Introduction to Quantum Financials	Mon, August 23 – 10:30 AM – 12:00 PM
Searching for NONPO Suppliers	Mon, August 23 – 1:30 PM – 3:00 PM
Using NONPO Invoices for Check Requests	Tue, August 24 – 9:00 AM – 12:00 PM
Reallocating & Approving Procurement Card Transactions	Tue, August 24 – 1:30 PM – 4:00 PM
Using Debit Memos for Accounting Transfers	Wed, August 25 – 9:00 AM – 12:00 PM
Creating & Approving Requisitions	Wed, August 25 – 1:00 PM – 4:00 PM
Receiving Orders	Thu, August 26 – 10:00 AM – 11:00 AM
Creating Customer Billing	Thu, August 26 – 1:00 PM – 4:00 PM

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

Quantum Financials - Creating Customer Billing

If you have not yet taken the Customer Billing and Recording Disputes course, it is needed to understand how to bill external customers for goods and services provided by UMB. This class is important to learn about billing our Foundation partners, UMBF (UMB Foundation) and USMF (USM Foundation). Register via the Financials Calendar or the [Enterprise Training Database system](#). More information on Foundation billing can be found [here](#).

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!

The **August/September Quantum Analytics** classes include:

Quantum Analytics Course Name	Date/Time
Payroll Management Dashboard	Tue, August 17 - 9:00 AM – 11:00 AM
All Activities Management Dashboard	Wed, August 18 - 9:00 AM – 11:00 AM
Sponsored Management Dashboard	Thu, August 19 - 9:00 AM – 11:00 AM
Sponsored Management Dashboard	Tue, September 14 – 9:00 AM – 11:00 AM
Payroll Management Dashboard	Wed, September 15 – 9:00 AM – 11:00 AM
All Activities Management Dashboard	Thu, September 16 – 9:00 AM – 11:00 AM

Quantum Analytics classes do not require advance registration. You can access all the sessions using this log-in information: <https://umaryland.webex.com/join/bmerrick> Access code: 730 028 347 To phone in: 415-655-0001

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](#).

