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Focus on PCard

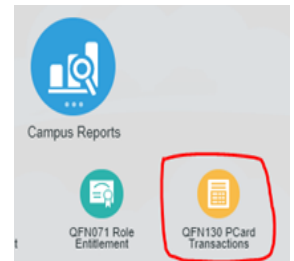
This is a recurring section that will feature information on PCard reallocation and record keeping with Quantum. Check out past and future issues of [Quantum Bytes](#) for more PCard information, and if you have other PCard related topics that you would like to see featured, send them to quantumfinancials@umaryland.edu with **Focus on PCard** in the subject line.

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New Quantum PCard Transactions Report

The **PCard Transactions Report** is now available under the Campus Reports icon on the Quantum Financials landing page and was designed to help with PCard recordkeeping and reconciliation responsibilities.



Users can run all PCard expense items by Cardholder, by Org, and/or by Status of Expense Report. The report will return results for items that have been added to an expense report and are in one of several expense report statuses (e.g., **Paid**, **Withdrawn**, **Pending Manager Approval**). Results will also return for PCard expense items that are in **Not Created** or **Saved** statuses because they have either not yet been added to an expense report or have been included on an expense report and saved but not submitted for approval.

The report prompts will allow users to select by an **As of Transaction Date** and/or one or multiple **Billing Cycles**. Report results can be viewed on screen or exported as a PDF or Excel file. The report is available to cardholders, approvers, delegates, department administrators, and central office staff.

The Quantum Training Team is developing a UPK tutorial that will be available soon to assist with how to use the report and interpret the results. If you ran the report when it was first released last week, you may have noticed that totals for itemized transactions were not reflected properly. That has been corrected and your transaction totals should now be properly reflected. If you experience any trouble accessing or using the report, or have questions about your results, please send your requests to help@umaryland.edu.

PCard Expense Report Statuses Defined

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 Accrual/Reversal Notification

Quantum Analytics users who check the Transaction Details Union Report monthly for your PCard Accrual and Reversal transactions should be aware that for the April accrual you will need to include the Transaction Types PCard Accrual and Spreadsheet Journal to see the full results of the April month end accrual and related reversal. The Spreadsheet Journal was used as a one-time correction to get the accrual and reversal to appear in the proper months. For any month other than April 2020, you will just need to select the PCard Accrual transaction type to see both sides of the process. Questions should be sent to help@umaryland.edu.

[Previous Quantum Bytes Issues](#)



Quantum Financials Upgrade

The quarterly upgrade to Quantum Financials that was postponed from May 15th will now be received on June 19th. To accommodate the upgrade, Quantum Financials will not be available from 10 pm Friday, June 19th to 8 am Saturday, June 20th. You can also find information about Quantum upgrades and planned outages on the IT Alerts section of the myUMB portal page.

This upgrade does not include major changes to the user experience, but you may notice minor differences on some of the screens you usually navigate. Remember to clear your browser cache before you sign in to Quantum Financials after the upgrade so that any new features or fields will appear. If you do not clear cache, your browser may return an older version of the Quantum screens and you will not be working with the most up to date system features. A best practice suggestion is to clear browser cache every day prior to signing into both Quantum Financials and Quantum Analytics.

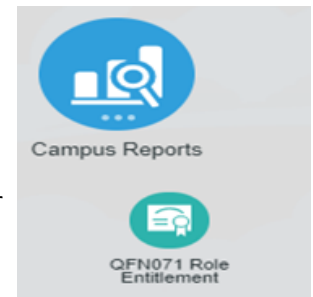
Although the Quantum support team did extensive testing of the upgrade, it is not possible to test every scenario during the allotted testing period. After the upgrade, if you see something that looks inaccurate when using the system, please send that information, with a screen shot, to help@umaryland.edu so that it can be investigated.

A Change to the Change Order process

One change that will be coming after the upgrade involves streamlining the Change Order request process. Starting next week, change order requests will be made using a process that is similar to completing requisitions. Users will no longer have to complete the Change Order Request form to initiate the process. A UPK tutorial is being developed to assist users with the new process.

Role Entitlement Report

There is a new report under the Campus Reports icon on the Quantum Financials landing page. The Role Entitlement Report allows you to quickly check the security roles and access for yourself, your department, or even your school. You can also check to see if someone in your organizations has a specific role. For example, if you are going through your fixed asset audit you may need to see who in your department has the UMB Fixed Asset Inquiry role or if you need a Requisition approved you may need to see who has the UMB Requisition Approver role. You can do all of that and more with the new Role Entitlement Report now available under the Campus Reports icon! A UPK tutorial will be available soon.



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. Look for a new and improved Financial Calendar soon!

Quantum Financials Year-End Deadlines instructions can be found on the [Announcements page](#) of the Financial Services website. Please note the important deadlines leading up to the FY 20 year-end close.



Quantum Analytics Transaction Details Union Report Cheat Sheet

A new Quantum Analytics User Aide has been added to the Training and Support [page](#) of the Quantum website. The Transaction Details Union Report Cheat Sheet provides the name and examples for each field of the Transaction Details Union Report. The cheat sheet will assist users of the Union report with identifying the contents of the columns that are generically titled (e.g., Attribute 1 – 7, Reference).

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.

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 NONPO Invoices for Check Requests	Wed, June 17th - 9 am - 12 pm
Receiving Orders	Thu, June 18th - 9 am - 12 pm
Using Debit Memos for Accounting Transfers	Fri, June 19th - 9 am - 12 pm
Reallocating & Approving Procurement Card Transactions	Mon, June 22nd - 9 am - 12 pm
Creating Customer Billing and Recording Disputes	Wed, June 24th - 9 am - 12 pm

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
Drill Down Enhancements for Award and Budget to Actuals Details reports	Tue, June 23rd - 9 am - 10 am
Transaction Detail Union Reports	Thu, June 25rd - 9 am - 10 am
Advanced Techniques for Drill Down Enhancements reports	Fri, June 26th - 9 am - 11 am
Intro to Sponsored Management Dashboard	Mon, June 29th - 9 am - 11 am
Intro to All Activities Dashboard	Tue, June 30th - 9 am - 11 am

If you have questions on which courses are necessary for your access, please email the Quantum Training Team at fssystems@umaryland.edu. We're looking forward to seeing you soon!



Notes and Reminders

Rejected NONPO Invoices that are not reworked and re-submitted must be canceled. If the check request is no longer needed, the initiator should delete/cancel the invoice by clicking on Invoice Actions and selecting the appropriate option. In preparation for year end, Financial Services – Disbursements will be deleting/cancelling any NONPO invoices that have not been resubmitted for approval within 30 days.

New Objects hierarchy—The Quantum Objects hierarchy has been updated with three new miscellaneous revenue objects (0964, 0965, and 0966) and is available on the Chart of Accounts page of the Quantum website.

Clear cache often – This is especially important after upgrades and patches so that you access the most up-to-date version. Best practice suggestion is to clear your browser cache everyday as part of signing into Quantum.

