SPAC Post Award Support

SPAC is trying to develop some post Quantum implementation TEMPORARY solutions to maintain the continuity in the workflow

Key Topics for This Newsletter

SPAC use of Quantum Detailed Expense Report & Payroll Detail Reports

HRMS Code Search

Purpose and Activity Codes

Hot news!

Budget Retro cutoff date for 7/1/19 has been extended to period 20-12

SPAC - Using Quantum Detailed Expense Reports from Quantum Financials

When SPAC sent out the ROE's (Report of Expenditures) and FFR's (Federal Financial Reports) for those projects ending in September, we thought that Quantum Analytics would have drill down capabilities. Last week we were notified that the drill down would not be available until December 6, 2019. Therefore, we have defined a solution that will provide expense detail.

Breadcrumbs

Quantum Financial >Tools>Reports & Analytics>Browse Catalog

<u>Before you go any further</u>, make sure your account is set up correctly to see the report - you only need to set this up once

"Your Name">my Account - change the Currency from "default" to "Entered Currency", click okay,

Now back to your breadcrumbs

Shared Folders>Custom>Projects>Project Cost (highlight this)

Open   QFKC7-Individual project Cost Detail

Search by Award Number or Project Number

Hit the OK button

Export >Excel 2007>Open

Notes:

- This report also contains cost share expense. If you filter by Column E for the "Y" designation that will give you the actual billable project costs only.
- The report does provide detail, however many of the transactions were converted from PeopleSoft.
- If his report DOES NOT give payroll detail (see below for payroll detail)
- There is still detail available in PeopleSoft for converted items.
- We will also be using this report to develop the ROE's and FFR's for October and possibly November. Please contact your SPAC Team if you have any questions about this report.
- This solution <u>will not</u> be necessary once we are fully functional in Quantum Analytics.

RESOURCES

Team Red Email

Rs-SPAC-Red

Team White Email

RS_SPAC Team White

Volume Base Billing

Chris Hook

OR

REFER YOUR

CONVERSATION IN

OSN

Payroll Detail

Although the report above does not give payroll detail, Quantum Analytics does provide this detail support in the test runs we have made.

Breadcrumbs

QA Landing page>Payroll Sponsored Details

You want to choose Pay Periods Posted and you must know your start pay period and end pay period for the invoice that is being delivered to the sponsor. You must also put in both the award and the project number. Make sure Funding source is "External" (to exclude the cost share). Hit the apply button.

Once the award is generated, you can choose either the Salary $ or the Salary and Fringe$ from the dashboard. This report provides you with the EMPID, Name, Object code, Job code and the pay or pay and fringe for the periods selected.

You can export this report to excel.

If you are sending this report to the outside, you may want to delete some of columns – for example Employee ID and Object code.

HRMS Codes

So we used to talk about "chart strings" however, we no longer put them into the system in a bundle. Behind the scenes, the HRMS table takes all of the pertinent information from Quantum Financials and creates the HRMS code which is needed for your EFPs (Employee Funding Profiles). Below are the instructions on how to get to that information in HRMS

- All users with CA Initiator/Reviewer/Approver/Query Roles already have access to this page
- Page will not return pre quantum combo codes

The breadcrumbs in HRMS: Main Menu>Set Up HRMS>Product Related>Commitment Accounting>Budget Information>Combination Code Table
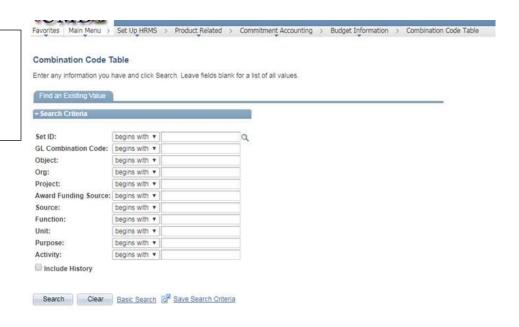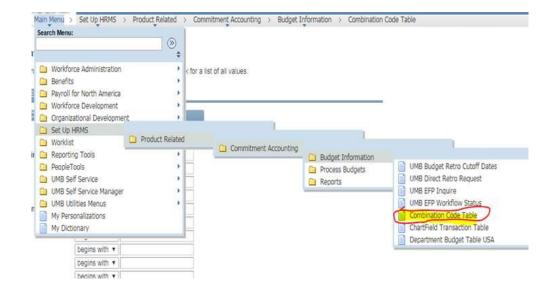
See Screenshot Below

SPAC supports the University's mission through our teams' dedicated commitment to serving as a knowledgeable resource to our stakeholders in all aspects of post award financial Administration

Screenshot Breadcrumbs

Purpose and Activity

Due to the fact that these are department initiated fields, we need a way to capture them. We have been working with SPA to have these initiated at the proposal level, however, if you have multiple projects under one award with different purpose and activity codes, this could cause a problem.

The current solution is that these fields have been added to Kuali Research. You have fields with a 35 character capability. It will be in "supplemental information tab" within the proposal. It will say Quantum Purpose and Quantum Activity. If there is info included in the proposal, it will automatically populate IP and award.

SPAC will retrieve this information from the Supplemental information section and populate that information into the project level detail of the award. What SPAC will not know is if you want to change this information on a future project under this award. The department would need to notify their SPAC team that this information needs to change upon the department's review of the setup of a new project.

Other Contact Information

The Quantum Team is working hard on all of the help tickets and questions to ensure that Quantum Financials and Quantum Analytics is fully functional. Many of them are from SPAC themselves.

The SPAC Team is working to try to create solutions for us to continue to complete our processes during this time. If there is anything we can do to assist your department in completing your post award tasks that is not "Quantum System Fix" related, please let us know.

The key contact information is located above in the red box, however, never hesitate to reach out to myself Laura Scarantino lscarantino@umaryland.edu, my Director Michelle Ward mward@umaryland.edu or my Senior Managers Krista Salsberg for Teams Red and White and Volume base billing ksalsberg@umaryland.edu or Beryl Gwan for our Cost Team bgwan@umaryland.edu.

More Topics Next Week!