Questions & Answers from Town Hall #2
Held On June 4, 2018

The questions below were raised by participants in the Quantum Financials Town Hall. Answers to a few questions have been updated to reflect discovery that happened after June 4, 2018.

Q: Will we be able to see grant transactions across Fiscal Years?

A: Yes. They are available in RAVEN today and will be available in Quantum after go live.

Q: I would like to get rid of my shadow systems. Will payroll encumbrances be displayed in Quantum Analytics sooner than they are today on the RAVEN Financials Inquiry pages?

A: Payroll encumbrances are driven by eUMB HRMS processing schedules. Right now encumbrances are calculated every 2 weeks just after labor distribution. Members of the eUMB HRMS team are working on changes within that system. We are trying to make it possible to display encumbrances sooner. We'll keep you posted.

Q: Will travel expenses be encumbered?

A: At this time there are no plans to encumber travel expenses.

Q: Will we be able to encumber indirect costs on encumbrances in the new system?

A: We have examined numerous options to do this in eUMB Financials, but have not confirmed a sustainable way to both encumber indirect costs and then relieve that encumbrance. If this were done in eUMB Financials it most likely would be done by running an allocation daily. While allocations are not a component in Quantum Financials, there still may be a way to accomplish this in the new system. It's probably not impossible, but we don't know yet.

Q: Will the dollar thresholds for UMB's purchasing options change with the implementation of Quantum Financials?

A: No. Dollar thresholds are set by USM Procurement Policies and Procedures. Currently purchases $4,999 or less go on a Corporate Procurement Card unless the vendor does not accept a credit card. Purchases $5,000 or more require a purchase order.

Q: As we create requisitions, will we be able to view multiple addresses for a given Supplier?

A: Yes. Requisitioners will see the Supplier name and address information associated with that Supplier. When identifying a preferred Supplier, Requisitioners will be required to select the appropriate address for the Supplier.

Q: Will we be able to see the Buyer's name on the requisition?

A: The Buyer's name will be added once a requisition is submitted for approval and it moves on to Strategic Sourcing and Acquisition Services (SSAS). The Buyer may be reassigned once reviewed by SSAS. If this occurs, the new Buyer's name will appear on the requisition.

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Q: Will we be able to view which Suppliers are woman-owned or minority-owned businesses?

A: No. This capability is not currently available in the new system. However the Minority Business Enterprise (MBE) page on the Strategic Sourcing and Acquisition Services (SSAS) web does provide several links that can be used to identify MBE vendors.

Q: How soon will encumbrances show up in Quantum Financials once the requisition is approved?

A: Encumbrance amounts related to requisitions will show up in Quantum Financials immediately upon approval.

Q: Will a Requisitioner be able to see the status of the approval of all funding sources on a requisition even outside her/his own department?

A: Yes. As a reminder, all department approvers must approve a requisition in Quantum Financials before workflow will move the requisition along to Strategic Sourcing and Acquisition Services.

Q: Is the requisition process you demonstrated at the June 4 Town Hall the same process that users will follow for reimbursements (today's PUR02s)?

A: No. What is today's PUR02's will have a new name and will follow a different process in Quantum. During the September 2018 testing cycle we will test several options and make a determination of which will be used when we go live with Quantum.

Q: Will we be able to see the selected Supplier and the purchase order (PO) amount when we view PO dispatch notifications?

A: Yes. Dispatch advice – supplied by email today – will be included on your Notifications list within Quantum Financials. Simply click the link on your list to view a recap of the PO data, including Supplier name and PO amount. You will be able to view additional detail by opening the PDF attachment included on the recap page.