



UMB
QUANTUM
FINANCIALS

*A leap forward. Transforming systems.
Empowering People!*

Change Champions

June 27, 2019

Agenda

- Project Timeline – What's Next
- Roles
- Training
- Business Process Sessions
- Questions

Project Timeline – What's Next

- Just finished SIT – some SMEs were involved
- User Acceptance Testing
 - Planning now
 - Testing will be late July – early Sep
 - More users will be involved – Project Team Leads will reach out
- Roles and Training
- Conversion/Cutover planning – Sep will close early in eUMB; could be down 10 – 14 days; Instructions will come out to help with planning
- Go-Live – Oct 2nd

Roles

- All roles were tested in SIT
- Plan for assigning roles to users
- Anticipated schedule
- Online security authorization form
- Roles and descriptions

Role Information – A Sample

Role Name	Description	Replaces this eUMB Financials Role
Procurement Requester	Has rights to <ul style="list-style-type: none">• Initiate, submit, edit and cancel requisitions created on behalf of self• Receive goods/services for anyone	Requisitioner Receiver
Procurement Preparer	Has rights to <ul style="list-style-type: none">• Initiate, submit, edit and cancel requisitions created on behalf of self or others• Receive goods/services for anyone	Requisitioner Receiver
Requisition Approver (managed through workflow)	Approves requisitions expensed to the department(s) the user has identified on role request form	Dept Approver

Training for Departmental End Users

- Go Live training: mid-August through mid-November
- Building plans to provide system training for 1500-2000 users
- Developing 12 courses related to Quantum roles, most required
- Pre-requisites:
 - Chart of Accounts Overview
 - Introduction to Quantum Financials
- Goal: Offer training in multiple formats (instructor-led, Webex, self-paced)
- Check the Elm/Elm Weekly and Quantum website in mid-July for details

Training for Departmental End Users

Overview of Quantum Chart of Accounts

Introduction to Quantum Financials

Creating & Approving Requisitions/Receiving Orders

Reallocating Procurement Card Transactions

Using Debit Memos for Accounting Transfers

Using NONPO Invoices for Check Requests

Creating Customer Billing

Viewing Your Area's Fixed Assets

Viewing Grants & Using Oracle Social Network to Initiate events

Using Quantum Planning & Budgeting

Using Quantum Analytics (no training requirement)

Changes to Commitment Accounting Pages in eUMB HRMS

Business Process Sessions

- To expose users to business process changes and new terminology
- Chart of Accounts – prerequisite for training - 4 sessions in June 500 attended – July sessions coming
- Purchasing and Paying for Goods and Services – July 2nd 10 am - 12 pm SON 130 [Register](#)
- PCard - July 9th 10 am – 12 pm PH N103 - Repeat of 4/18 session
- Resources added to [Quantum website](#)

