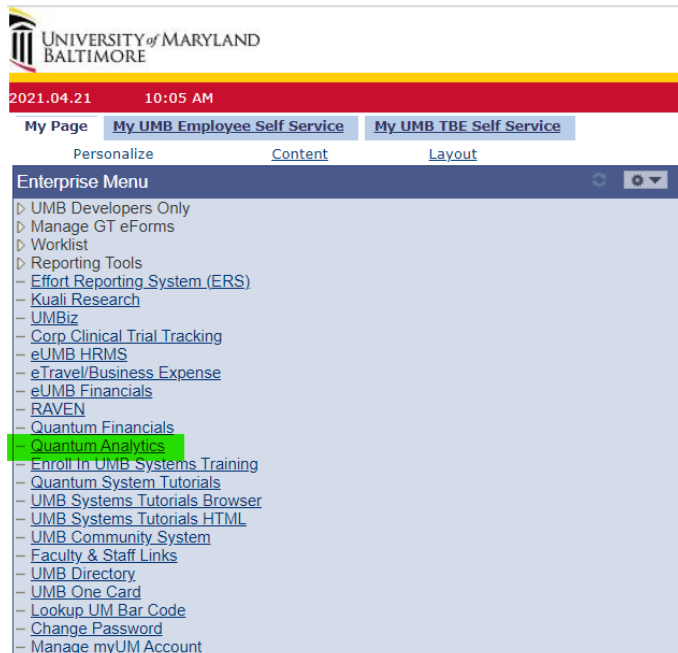


## How to Run the Object 7062 Report in Quantum Analytics

Object 7062 is a clearing Object used to record study participant payment (SPP) requests for cash and gift cards. After cash or gift cards have been disbursed to the study participant, a debit memo is needed to credit Object 7062 and charge Object 3125 Participant Study Pay - Group. Be careful not to select Object 3130. (Object 3130 – Participant Study Pay – Indiv is used for checks made payable directly to the study participant).

### 1. Log into Quantum Analytics.



Need access to Quantum Analytics? Complete the [Access Request Form](#).

### 2. Click SPP 7062 Activity on the Quantum Analytics Landing Page:

**Sponsored Management**

**Trends**  
Analyze year-over-year trends of sponsored proposals, awards and expenditures on a fiscal year basis. Includes graphical and tabular displays of the data.

**Search**  
Identify Quantum awards and Quantum projects meeting various criteria. HINT: To search Kuali Research proposals and awards utilize the Kuali download pages on the download dashboard.

**PI Profile**  
Provides a one-stop shop to provide information on the entire sponsored portfolio of an individual Principal Investigator. Drillable to Award Detail for a deeper analysis of each award.

**Award Detail**  
Comprehensive details necessary to manage an individual award or project. Includes budget to actual as well as various reports of revenue and expense activity on an inception-to-date basis.

**Find My Award**  
Having trouble finding your Award Number but you know other attributes like the Project Number, PI, Owning Organization, and Sponsor? Use this page to more quickly identify Awards.

**F&A Yield**  
Displays "F&A Yield" – a calculation of the yield of the effective indirect cost rate, expressed as a percentage of total direct costs. Page provides users the option to see the results either with or without Cost Share.

**SPP 7062 Activity**  
Displays all study participant payment (SPP) activity processed through Object 7062 (Cash Study Participant Pay), including the initial issuance of the working fund check and the debit memo charges to Object 3125 (Participant Study Pay Group) reflecting distributions to participants. Drillable to NONPO invoice and debit memo details.

3. Two Options:

a. General Ledger option returns multiple SOAPFs:

System defaults to the General Ledger (SOAPF). It is based on the Org and can be useful for determining all of the 7062 activity for projects mapped to the same Org (i.e. managed under the same Org).

 **QA4 - Sponsored Management**

QA4.P1 - Trends   QA4.P2 - Search   QA4.P3 - PI Profile   QA4.P4 - Award Detail   QA4.P5 - Find My Award   QA4.P6 - F&A Yield   QA4.P7 - 7062 Activity

Landing Page

Please select  SPP 7062 GL  SPP 7062 Transaction Details

Fiscal Year 2021   GL School (All Column Value)   Object --Select Value--  
 \* Fiscal Period Beg >= Jul-20   GL Org 10207020-IHV Cl   SOAPF --Select Value--  
 \* Fiscal Period End <= Apr-21   **Apply** **Reset**

**What is the SPP Activity on Object 7062? (QA4.P7.R1)**

Time run: 4/21/2021 1:52:26 PM

**\$3,380.00**  
**Total**

Transaction Type	Invoice Number	Amount Type	Amount	Invoice Description	Invoice Created By	Check/Payment#	Check/Payment Date	Supplier	Line Item Details	Fiscal Period Name	Account Combo	SOAPF Code
Check Request / Working Fund	20-RW0374A	Actuals	\$5,000.00	[REDACTED]	[REDACTED]	180829	8/3/2020	[REDACTED]	[REDACTED]	Aug-20	7062-365-10207020-000000-000000000-340-00-000000-000	365-10207020-000000-00000000-340
Check Request / Working Fund	21-BS0001	Actuals	\$5,000.00	[REDACTED]	[REDACTED]	181490	10/29/2020	[REDACTED]	[REDACTED]	Oct-20	7062-315-10207020-000000-000000000-210-00-000000-000	315-10207020-000000-00000000-210

b. Transaction Details option can be used to view the 7062 activity for one project:

**QUANTUM ANALYTICS** QA4 - Sponsored Management

QA4.P1 - Trends   QA4.P2 - Search   QA4.P3 - PI Profile   QA4.P4 - Award Detail   QA4.P5 - Find My Award   QA4.P6 - F&A Yield   **QA4.P7 - 7062 Activity**

**Landing Page**

Please select  SPP 7062 GL  SPP 7062 Transaction Details

Fiscal Year: 2021   Award Owing School: (All Column Value:...)   Project Owing School: (All Column Value:...)   Award: --Select Value--

\* Fiscal Period Beg >= Jul-20   Award Owing Org: (All Column Value:...)   Project Owing Org: (All Column Value:...)   Project: 30014901-CCT 43

\* Fiscal Period End <= Apr-21   Award PI: --Select Value--   Project PI: --Select Value--   Source Code-Description: --Select Value--

Function Code - Description: --Select Value--

**7062 Cash Study Participant Pay Accounts (QA4.P7.R21)**

Time run: 4/21/2021 1:50:37 PM

Transaction Type	AP Invoice Header #	Transaction Number	Costs	AP Invoice Header Description	AP Invoice Created By	Check#	Check Date	Supplier	AP Invoice Line #	Object	Fiscal Period	SOAPF Code Combination String	GL Code Combination String	Sou Cod
Check Request / Working Fund	21-SK0175	21-SK0175	\$6,000.00	[REDACTED]	[REDACTED]	181638	11/23/2020	[REDACTED]	[REDACTED]	7062~Cash-Study Participant Pay	Dec-20	365-10207020-000000-UCOVID19-230	7062-365-10207020-000000-UCOVID19-230-00-00000-000	365
Debit Memo	21-SK0175A	21-SK0175A	(\$6,000.00)	Study participants have been compensated (10/22-	[REDACTED]	112095	01/29/2021	UMB Account Transfers	[REDACTED]	7062~Cash-Study Participant Pay	Jan-21	365-10207020-000000-UCOVID19-230	7062-365-10207020-000000-UCOVID19-230-00-00000-000	365

4. Export the results:

<b>Grand Total</b>				<b>\$2,500.00</b>
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Refresh - Print - Export

5. Attend Analytics Training to learn how to format the columns (e.g. reorder, delete, etc.) to make the report easier to manage. Quantum Analytics training recordings:

<https://www.umaryland.edu/quantum/quantum-webex-seminars/>