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## Inside this issue:

- QF Upgrade **Pg 1**
- Encumbrances Over Multiple Fiscal Years
- User Authorization Forms **Pg 2**
- Project Updates
- SPAC Reorganization
- Data Variances Addressed **Pg 3**
- 7062 Activity Report Improvement
- Quantum Financials email to be decommissioned
- Quantum Helpdesk
- Clear Cache **Pg 4**
- Concur Training Coming Soon
- Quantum Training
- QA Coaching Sessions



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Find prior issues of  
Quantum Bytes [here](#)

## Quantum Financials Upgrade

The next quarterly upgrade for Quantum Financials is set to begin in early November. The support team will be evaluating the release notes provided by Oracle over the next two weeks and will start testing by November 7. The upgrade will be absorbed by our production environment the evening of November 18. If any new features are identified from the evaluation and testing, look for that to be covered in our next issue.



## Multi Year Encumbrances – Why is it Important?

In our prior issue, we told you about the new functionality that allows users to submit requisitions for POs covering multiple fiscal years with the encumbrances reflected in the appropriate years. The UPK tutorial [Creating a Multi-Year Requisition](#) is available to help. So why is this important, who would care, and should your department start using this new feature?

The importance of this feature really rests with those who use Quantum Analytics reports to manage departmental funds. A Department Administrator, for example, may want to run the Budget to Actuals reports for the department and use the results for forecasting. If a multi-year lease was entered to Quantum Financials as a single requisition with the total amount reflected in the first year, the Analytics reports will not provide meaningful encumbrance results. The entire encumbrance will appear in the first year, which is not accurate. Instead, if the lease was entered as a multi-year requisition, the encumbrance for the current year will be booked into the current year and the encumbrance for future years will be booked into future years. Quantum Analytics reports will more accurately reflect encumbrance balances across fiscal years.

If you are someone who enters requisitions for your department, talk with your Administrator about how this helpful new feature can improve their department funds management. If you are an Administrator who finds your Quantum Analytics reports to be less than helpful because of inflated encumbrances that are not properly spread to the correct fiscal years, be sure to tell your requisitioners to use this new feature.



encumbrances



allocation



## Project Updates

**Quantum HCM**, a contemporary, people management and payroll system application.

The current eUMB (PeopleSoft) HRMS system is being replaced by the cloud-based Oracle HCM product to complement and integrate with our Quantum Financials, Analytics, and Planning and Budgeting systems. The QHCM project team is wrapping up the Discovery phase, evaluating options for the identified functionality gaps, and working with the Executive Sponsors to decide which modules to be purchased and implemented. The project is on schedule to start the design and implementation phase in early 2023. The team is in the process of updating the Quantum Website to include a Quantum HCM Project page where project content and updates will be available. Town Halls and other presentations will be offered throughout the project life cycle and will be included on the QHCM webpage to keep you updated and informed.

**SAP Concur Travel and Expense**, a fully integrated travel booking and expense application.

The implementation team is wrapping up testing system configurations and working with the Concur consultants to finalize our system for pilot testing. Pilot testing with a few departments is on schedule to begin this Fall and expand to additional pilot users in early 2023, with roll out to the campus following that. The team shared information on delegates, approvers, and plans for training, as well as a demo of the system, at the Town Hall held on Thursday, October 13. If you were unable to attend, the slides and session recording can be found on the **Business Applications website**.

## User Access Authorization Forms

Quantum User Access Authorization forms must be approved by your department before they can be processed. This form is needed to add a new user, make a change for an existing user, or delete a user from the system. The department administrator normally coordinates this process. The forms can be found using the following link [eUMB HRMS User Authorization Form](#).



## SPAC Reorganization

Sponsored Projects Accounting and Compliance (SPAC) will be reorganizing effective October 24, 2022. Their new look is designed around functional responsibilities, instead of their current model of red and white teams. SPAC has held several sessions since September 26 to introduce the new look and communication pattern. There is one remaining session scheduled for Thursday, October 20 from 1 – 3 PM. Invitation to the meeting was sent out via the RAC listserv. Presentation slides are accessible on the SPAC [web-site](#).

After the reorganization, SPAC will be holding comment and question-and-answer sessions for two hours once a week so that you can provide feedback on how things are going and what could be improved for the best customer service interaction. These sessions will take place between October 31 and December 9 and will be announced via the **RAC listserv**.



## Data Variances Are Being Addressed

Please be aware that help desk requests have helped to identify certain data variances between the Transaction Details Union report/drills and the Budget to Actuals Summary and Detail reports that the Quantum support team is currently investigating. Although we do not have a solution you should know that if a pay date falls in a different month than the pay period end date, there may be a slight difference in the encumbrance balances between the **Quantum Analytics Award Detail** and **Budget to Actuals Summary reports** and **HRMS reports**. This is because the QA reports use the month end date for encumbrance calculations and HRMS uses the pay period end date for encumbrance calculations. This difference generally only occurs **two months (2x)** out of the year and should be considered when reconciling payroll encumbrances. SPAC will be including this occurrence in their forthcoming Focus Group discussions.



## 7062 Activity Report Improvement

The **SPP 7062** Activity Report was improved last month to include certain transactions that had been missing from the report. The report now accurately reflects all transactions and can be used to support your requests for working fund checks for research study participant payments (SPP).

The report will show all checks issued, disbursements allocated from Object 7062 to Object 3125, and any related adjustments. If you still have any questions or concerns about the 7062 report, please send them to [help@umaryland.edu](mailto:help@umaryland.edu) so the appropriate Quantum support team member can investigate and respond.



## Quantum Financials email to be **DECOMMISSIONED**

The [quantumfinancials@umaryland.edu](mailto:quantumfinancials@umaryland.edu) email box was created to communicate important project information during the Quantum Financials and Analytics project. Since those systems went live in **October 2019**, users have been asked **NOT** to send requests for help with Quantum questions or concerns to that email box, but instead to use the CITS helpdesk at [help@umaryland.edu](mailto:help@umaryland.edu) so all requests could be triaged to the appropriate support team member for investigation and follow-up. To improve efficiency of the request and response process, [quantumfinancials@umaryland.edu](mailto:quantumfinancials@umaryland.edu) will be decommissioned as of **November 15**. A new email has been created to send out communications but will not accept incoming messages.

**Look for new messages** from [Quantum@umaryland.edu](mailto:Quantum@umaryland.edu) soon!!!!

## Quantum Helpdesk

The Quantum support team asks that while continuing to send your Quantum requests for help to [help@umaryland.edu](mailto:help@umaryland.edu), also include “Quantum Financials” or “Quantum Analytics” in the subject line of the help request email to assist in speeding up the assignment process.





## Clear Cache Daily

This is especially important after quarterly upgrades and patches so that you can access the most up-to-date version of Quantum. The best practice suggestion is to clear your browser cache every day as part of signing into Quantum. Instructions can be found [here](#).



## Concur Travel & Expense—Coming Soon

UMB's new Travel and Business Expense System, Concur, will go live in winter 2023. A Pilot group will start working in the live system in November 2022. We expect a second pilot group to begin working in early 2023.

Travel Admins will be required to attend instructor led training in 2023, and the dates and enrollment information will be communicated soon. All regular travelers, supervisor approvers and cost center approvers will access self-study training in the coming months, as they do today.

## Quantum Training

**Quantum Financials** classes are delivered via WebEx and designed to introduce new users to the application. Current users are welcome to join any class for a refresher. Register either via the [financial calendar](#) or the [training registration database](#) by 5 PM the day before the class to receive an email with instructions for joining your virtual class session.

Information on required training for each Quantum Financials role is available on the [Quantum Training and Support page](#). If you need additional information, please email the Quantum Training Team at [DL-BFBusinessApplications@umaryland.edu](mailto:DL-BFBusinessApplications@umaryland.edu).

**Please note that the Introduction to Quantum Financials class is a prerequisite to all Quantum Financials training classes and is offered monthly. Some Quantum Financials classes may have additional prerequisites. Please look for those requirements when registering via the Financial Calendar and Training Registration Database**

**Quantum Analytics** classes are delivered via WebEx, but do not require advance registration. You can access all the sessions using the log-in information below:

<https://umaryland.webex.com/join/bmerrick>

Access code: 730 028 347

To phone in: 415-655-0001



## Analytics Coaching Sessions

Quantum Analytics users are invited to schedule 45-minute timeslots for individual or small group coaching on reports of their choosing.

The Next available dates will be  
**October 28 & November 18**

Using WebEx, users will share specific reports they would like assistance with, and/or to discover new reports they have not yet tried. The focus will be on **your** topics. To schedule a time slot, please contact Buzz Merrick at [bmerrick@umaryland.edu](mailto:bmerrick@umaryland.edu).

