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UNIVERSITY *of* MARYLAND BALTIMORE

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Quantum Notes

PCard Approver Role

Maybe You Can...But should you?

Part of the responsibility of a PCard Approver is to review the Account or Project fields assigned to each PCard transaction before approving an expense report. To access the screen that includes this information, approvers need to have both the PCard Approver and UMB PCard Reallocation roles in Quantum Financials. During a recent audit of security access, it was noted that some approvers do not have both roles. An email was sent to those approvers with instructions on how to add the appropriate role. You can tell if you need to add the UMB PCard Reallocation role if you do not see these fields when you are approving your cardholders' expense reports.

To add any roles in Quantum Financials, complete and submit the Quantum Financials User Authorization Form here. More information on Quantum Roles and Definitions is available here. If you need any assistance, please reach out to help@umaryland.edu.

Receiver ROLE Enhancements

There have been enhancements made to the *UMB Procurement Receiver Role* that provides more functionality when searching for and receiving against **PO's.**

This role should be requested along with the Procurement Preparer and/or the Procurement Requester role, although it can be requested alone by those whose main duty is receiving.

Users who already have the UMB Procurement Receiver Role do not need to take any action.

If you would like to add this role to your Quantum Access, please complete a security form. For any questions, please email the help desk at help@umaryland.edu.

Project Updates

The **Concur Travel and Expense** application is being rolled out in a phased approach. The first pilot group will start using the new system for Travel Requests, Business Expense Requests, Travel Booking, Travel Expense Reports, and Business Expense Reports as of Monday, November 28. If all goes as planned, an additional pilot group will start using the system in Jan 2023 with roll out to everyone else targeted for the end of February 2023. The project team is excited to provide this new application that will integrate our travel, booking, and expense processes, give us robust reporting and analytics tools, and give our travelers access to mobile travel applications and enhanced features. One enhancement is how we will get help with Concur. Our first tier of help will be through the Concur helpdesk – not UMB's helpdesk. Users will reach out to Concur for help online, via a live chat, or by phone call. Look for more information on this new feature in future communications.

The **Quantum HCM** project is moving into a pre-implementation phase with our consulting partner, Huron. The team will be working together over the next few months to develop possible system configuration and business process options to address our critical needs. Project team leads, along with subject matter experts and Change Management Network partners, will be an important part of this process. The project is on schedule to start the design and implementation phase in early 2023. The Quantum Website is being updated 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.

HELLO my name is

SPON Aging Report Now includes PI Name

In response to a user's request, ***the SPON AR Aging report (QFN044) has been expanded to include the PI Name.*** The report can be found in Quantum Financials by selecting the Reports icon and then SPON AR Aging under Collections.

Collections
CBS Aging (QFN096)
SPON AR Aging (QFN044)

New User Aid

Check out the new user aid—***How to Include Pay Period "27" in Fiscal Year Payroll Reporting—***on the Quantum website. It provides instructions on how to use the Downloads Management Dashboard report ***QA6.P2 – Payroll*** to report end of Fiscal Year Payroll that includes all days in the fiscal year – sometimes referred to as PP27 (Pay Period 27).

Coming Soon—Concur Training and Town Hall

With the roll out of the Concur Travel and Expense system to all campus users expected for early 2023, our attention has turned to training. The Business Applications Training Team has been hard at work developing various training tools to meet your needs. All ***Travel Administrators*** will be ***required*** to attend instructor led training before using the new application. Sessions will be scheduled into early 2023. All others – Travelers, Supervisor Approvers, Cost Center Approvers – are encouraged to view the self-study recording ***Introduction to Concur Travel and Expense System*** on the Business Applications website to familiarize yourself with the new system features. The recording is a pre-requisite for any other Concur Travel and Expense instructor led sessions, so feel free to get an early start. If you are part of the pilot group, you have already been contacted with information about how to access the training resources.

The next Travel and Expense Town Hall is scheduled for Wednesday, December 7 from 10 am – 12 pm. To attend, add the meeting to your own calendar and use this link to join at the appropriate time. The team looks forward to sharing updated information about the Concur project timeline, application workflow design, training plans, the pilot group experience, and a demo of system functionality. In addition, the Office of the Controller will let you know about their ongoing work to update travel policies and procedures and the International Operations Department will be on hand to answer questions related to the newly launched Global Hub. Bring your travel related questions for the Q & A!

Quantum Financials email has been DECOMMISSIONED

The 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 so all requests could be triaged to the appropriate support team member for investigation and follow-up.

To improve the efficiency of our request and response process, the quantumfinancials@umaryland.edu has now been decommissioned. Communications will now be sent from Quantum@umaryland.edu and *incoming messages will not be accepted* **!!!!**

7062 Activity Report Update

We reported last month that the **SPP 7062** Activity Report was accurately reflecting all expected transactions. This report, created to support your requests for working fund checks for research study participant payments (SPP), will show all checks issued, disbursements allocated from Object 7062 to Object 3125, and any related adjustments by **Project and/or Award**.

It was recently noted, however, that when running the SPP 7062 report by **Organization** instead, the report is missing transactions. The Quantum support team is working to correct that problem. In the interim, if you have a need to access the report by Org instead of by Project/Award, or any other concerns about the 7062 report, please send your request to help@umaryland.edu so the appropriate Quantum support team member can investigate and respond.

GLOBAL HUB

UMB is proud to have officially launched its **Global Hub.** The launch, hosted by Dr. Jarrell, was held on November 1, 2022. You can find the recording to this event here. This new service, jointly staffed by the Center for Global Engagement and the International Operations Department, is a one-stop shop where UMB faculty, staff, and students engaging in international activities can get support and access to information and resources to facilitate their global work.

The cross-disciplinary Global Hub offers specialized expertise in areas of program development, partnership development, procurement, travel, safety and security, human resources, IT, legal compliance, and other functional areas from an international context. The Global Hub is open for business and can be accessed through the website, a convenient online questionnaire, or a central email address, where your questions and requests for help will be routed to specialists who will work with you to help you get things done outside the US, in alignment with UMB's core values, while also complying with relevant legal and regulatory requirements and mitigating risk.

Thank You!! Based on user feedback Analytics classes will now begin after the Quantum Financial Classes starting in January 2023

22D – Quarterly Update

The Quantum support team will be testing the next quarterly upgrade 22D for Quantum Financials. Any new features from the upgrade will be available to users effective 11/19/22. You can find information about Quantum upgrades and planned outages on the IT Alerts section of the myUMB portal page. Remember to clear your browser cache before you sign into Quantum Financials and Quantum Analytics after the upgrade so that any new features or fields will appear. After the upgrade, if you see something that looks inaccurate when using the system, please send that information, with a screen shot, to help@umaryland.edu so that it can be investigated.

Clear Cache Daily

It 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.

Quantum Financials Training

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 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 on Quantum training, please email the Quantum Training Team at DL-BFBusinessApplications@umaryland.edu.

(CMAS) Drop - IN

Join Change Management and Advisory Services (CMAS) for periodic drop-in educational sessions on a variety of topics that address compliance, internal controls, audit updates, and policies and procedures. Each session will begin with a brief presentation followed by ample time to ask questions and share concerns. Sessions will be scheduled every other month and will be announced in the Elm in advance of the scheduled date. **No registration is required.** Just click the link that will be provided at the appropriate time.

Scheduled dates for CMAS Drop-In Sessions:

Topic: Focus on Catering using the PCard

Nov 15, 2022, from 10:00 AM to 11:00 AM

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 date will be
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.

Quantum Analytics classes are delivered via WebEx, but do not require advance registration. You can access all the sessions using the following log-in information:
https://umaryland.webex.com/join/bmerrick

Access code: 730 028 347   **To phone in:** 415-655-0001