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Find prior issues of Quantum Bytes here

Increased Mileage Rates

The mileage rate for use of your personal vehicle for business travel purposes has increased from **62.5** cents to **65.5** cents per mile effective January 1, 2023. When the new Concur Travel and Expense system goes live this Spring, the appropriate rates will automatically be applied for you. Until then, you can find the new mileage rate and other important travel rate information on the Office of the Controller's website.

Role Validation

The annual validation of security roles held in both Quantum Financials and eUMB HRMS is currently underway. Notifications were sent with instructions for how to run the reports of security roles, validate the employees and roles, use DocuSign to sign the certification statement, and send the reports to rolevalidation@umaryland.edu.

Signed reports are due back by February 27, 2023.

For those individuals who are submitting updated User Authorization Forms to complete the validation process, use the "Your Request History" link, available on the left menu of the User Authorization Forms home page. This page will allow users to track the status of forms they submitted for themselves or as a proxy for someone else, as well as forms they approved.

Employee Access in Quantum Financials

Principal Investigators (PIs) must have an active account in Quantum Financials to be assigned to awards by SPAC. The process for setting them up with an active account should be seamless and not require any additional requests. However, if you find your PI is unable to be assigned to awards properly, please submit a request to help@umaryland.edu requesting to add them as an active user to Quantum Financials.

The New *Learning Management System*

In November 2022, Human Resource Services upgraded to a new learning management system (LMS). Percipio is UMB's new personalized, immersive, and accessible learning platform that allows users to improve their skills in various areas at their convenience. In addition to personal improvement courses, eLearning and compliance training will also be available in Percipio.

The **Office of the Controller** recently added the **Business Travel Policy and Procedure** online course. This course will help familiarize Travel Administrators with the policy and procedures they need to know to properly approve Concur travel requests and expense reimbursements. You can access the course by:

1. Logging into Percipio using your UMID and completing the DUO authentication. Locate the Library icon next to the University of Maryland Baltimore Logo at the top left of the page. Click on Library to open the drop-down menu.

2. Under University of Maryland, Baltimore select UMB Systems End User Training, then UMB Financial Systems. Select the UMB Travel System Training Channel. The course is titled Understanding the UMB Business Travel Policy and Procedure.

PERCIPIO TRAINING
Engage | Inspire | Transform

System Update (s)

Concur Travel and Expense System

The Concur Travel and Expense system is progressing through the pilot stage, with several more schools or departments being added to the pilot group. Based on results identified by those participating in the pilot, and to give more time for testing, training, and user access set-up, the Concur support team has decided to extend the go-live date to April 10, 2023.

The team held its fourth Town Hall on February 7 where the decision to extend the go-live date was announced. The Town Hall also included recorded remarks from our University President, Dr. Bruce Jarrell, followed by comments and support from Dr. Dawn Rhodes, Senior Vice President and Chief Business and Finance Officer. Other information shared at the Town Hall included important dates for cut over from eTravel to Concur, system workflow, access roles that must be set up in advance of go-live, and training. If you would like to review the slides and/or recordings from the most recent Town Hall, as well as all previous events, you can do so on the Business Applications website under Presentations.

Quantum HCM

As part of the Quantum HCM project, key stakeholders based on their HR and Payroll job roles and responsibilities were identified to participate in a feedback exercise completing an Organizational Risk & Readiness Assessment (ORRA) facilitated by our QHCM consulting partner, Huron Consulting Group. The assessment closed on 2/3/23. The purpose is to identify elements of readiness regarding the Oracle Cloud HCM implementation.

Solutions are still being discussed and the Proof of Concept (POC) deliverable review meetings are scheduled with Huron consultants throughout February. The plan is to share potential solutions with the campus SMEs and other groups. The POC phase will end by the beginning March. Next steps will depend on the POC outcome to finalize the path forward.

Travel Administrators

What's Going on With Concur Instructor Led Training?

Over 300 Travel Administrators have been trained so far! That's great news!

With the Go-live date moved to April 10, The Concur Project Team thought it best to postpone the current instructor led training for travel administrators and restart the effort again in March.

- Instructor led training for Travel Administrators will resume **March 6** and run through **March 17**. This is not refresher training. This is training for travel admins who were not able to complete the courses before training was postponed.

- The new training schedule will be finalized and communicated by the Concur Training Lead sometime in February. No need to delete your registrations.

- There will be large group sessions open to the campus for Approvers and Travelers held between **March 20- April 10**. The Concur team will be demonstrating creating requests, creating expense reports, and approving these transactions as supervisor/cost center approver.

Schedule 1on1 COACHING *Today!*

A Travel Administrator's Work is Never Done – But **The Concur Support Team** is Here to Help!

Travel Administrators serve a pivotal role in the new Concur Travel and Expense system. As a Travel Administrator, you will be expected to know the relevant travel and business expense policies and procedures, and to share that important information with the employees in your departments. All travel and business expense requests and expense reimbursements will be routed through you for review and approval. You may also need to point your department users to where they set up their required profile details (e.g., personal information, delegates) if they need help.

The Concur support team knows that it is a lot to keep up with and are available to help you. If a small group, targeted session would benefit your department, Travel Administrators are encouraged to schedule a Concur Information Session with Luke Quell, the Functional Project Manager on the Concur project today. These sessions are designed to give a personalized overview of Concur, and to discuss which roles are necessary for a successful transition from eTravel into Concur. The goal is to demonstrate how to set-up your existing team in the new system, but with a focus on addressing your specific inquiries and concerns. If you've already had an information session with Luke and still have questions, email help@umaryland.edu with Concur in the subject line and a support team member will respond.
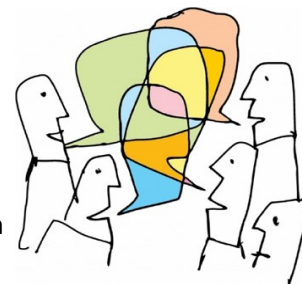
Good-Bye

In anticipation of the roll out of Concur, our new travel and expense system, we must also announce the close out of our old system, eTravel. As of April 7, 2023, we will sunset eTravel. That means that if your travel request or expense reimbursement was fully approved by April 7, it will continue to be processed in eTravel. However, eTravel will no longer be available for entering new travel requests and expense reimbursements. As we get closer to April 7, departments are encouraged to limit the use of eTravel as much as possible in preparation for the complete switch over to Concur.

As the deadline for access to eTravel approaches and our new systems are implemented look to **Quantum Bytes** for the insights and information that travelers and travel administrators should know.

CMAS Drop - IN

Change Management and Advisory Services (CMAS) offers 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.

The most recent session focused on Preventing Split Purchases on the PCard and provided valuable information to help PCard holders and approvers identify and avoid such purchases which could lead to audit findings. If you missed the session or have questions about whether a PCard purchase would be considered a split by auditors, feel free to reach out to CMAS. Upcoming sessions will focus on topics such as:

- Cash receipt procedures for departments that collect cash or checks on behalf of UMB
- Independent verifications and why they are important to auditors
- Using the PCard to make hotel reservations
- Documenting review and approval of payroll adjustments
- Recent audit exceptions

Look for CMAS Drop-In sessions advertised in the Elm!

The Quantum support team is completing testing for the next quarterly upgrade (23A) for Quantum Financials. Any new features from the upgrade will be available to users effective **02/18/23**. You can find information about Quantum upgrades and planned outages on the System Announcements 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.

Quantum Analytics

Coaching Session:

This workshop offers 45-minute timeslots for individuals or small groups of Quantum Analytics users to receive coaching and instruction on reports of their choosing. Using WebEx, users will share their screen to work on specific reports they would like assistance with, and/or to discover new reports they have not yet tried. The focus will be on topics that users bring to the session.

The Next Available Date will be: February 24, 2023

To schedule a time slot for a coaching session, contact Buzz Merrick. To access all QA WebEx sessions that do not require advance registration use the following WebEx log-in information:

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

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

Quantum Financials

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. Quantum Financials classes are delivered via WebEx and are 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.