Quantum Bytes — an update on all things Quantum

March 15, 2023

UNIVERSITY of MARYLAND BALTIMORE

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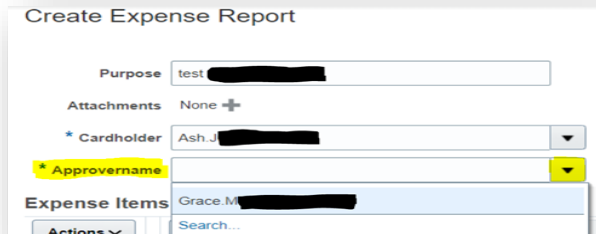
Quantum Financials

Why is my PCard Expense Report Approver Name Missing?

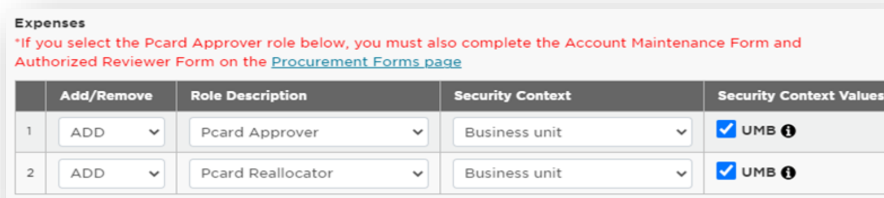
If you prepare PCard expense reports in Quantum Financials for yourself or as a Reallocation Delegate for another PCardholder, you should be familiar with the Approvername field.

That field contains the name of the Authorized Reviewer set up by SSAS for each card. There can only be one Authorized Reviewer for each PCard and Cardholders must notify SSAS when that person changes by submitting an Account Maintenance Form and an Authorized Reviewer Form so the system can be updated.



If the system is not updated and an inactive employee is selected as the approver, the workflow will breakdown and the expense report could get stuck. To eliminate that chance, the Approvername drop down **will now be blank** once an Authorized Reviewer becomes an inactive employee.

If you encounter a blank Approvername drop down, your department must notify SSAS of the new PCard Approver ASAP. Remember that before Approvers can be assigned in Quantum Financials, they must have the **UMB PCARD Reallocator** role so they will be able to view all necessary details of the expense reports they are asked to approve. Roles are requested using the Quantum Financials User Authorization Form.



If you have additional questions on the assignment of the Approver, please contact UMB's **PCard Administrator** at pcard-admin@umaryland.edu.

Thank You to Our Testers!

Quantum Financials (QF) absorbs an upgrade, potentially containing new functionality, every three months. To make sure our system will work as intended after the quarterly upgrade, the Quantum Support Team conducts extensive testing over the two-week period leading up to the upgrade date. In addition to the team that regularly supports QF, we have some amazing volunteers from Schools and Departments who have contributed to the testing. These members of the Change Management Network (CMN) are an invaluable addition and provide an end user perspective that we couldn't get without them.

A big thank you goes out to our February 2023 testers!

Shauna Guest	Kelli Sattler
Christina Manoto	Daryl Smith
Amy Mu	Tanya Stockton
Reetu Neupane	Megan Young

The next quarterly upgrade testing will take place in early May 2023. If you're already a member of the CMN and want to get involved with testing upgrades, please reach out to Laura Broy, Assistant Director, Applications Support at LauraBroy@umaryland.edu. If you're not already a member and are interested in joining the CMN, please reach out to Michele Evans, Assistant Vice President, Change Management and Advisory Services at mevans@umaryland.edu.

NONPO Invoice and Debit Memo Initiators: Remember Your Workflow Routing & Check Your Approvals!

If you submit NONPO Invoices or Debit Memos, please make it a habit to check the **Holds and Approvals** section to confirm that the invoice is in the approval workflow. The [Viewing Workflow Approval History on Debit Memos and NONPO Invoices] tutorial demonstrates the steps.

If you forget to include routing information on an invoice, it will be automatically rejected. Currently, email notifications are not going out for the automatic rejections.

To avoid delays, enter the needed information based on your type of invoice:

On a NONPO, if you are using a project distribution, you must enter the project details on the end of the line. Click the blue Details ( ) icon to enter both the **ProjectNumber** and **ProjectOwningOrg**. The [Creating a General Working Fund Study Payment] tutorial demonstrates completing a project distribution ledger line.

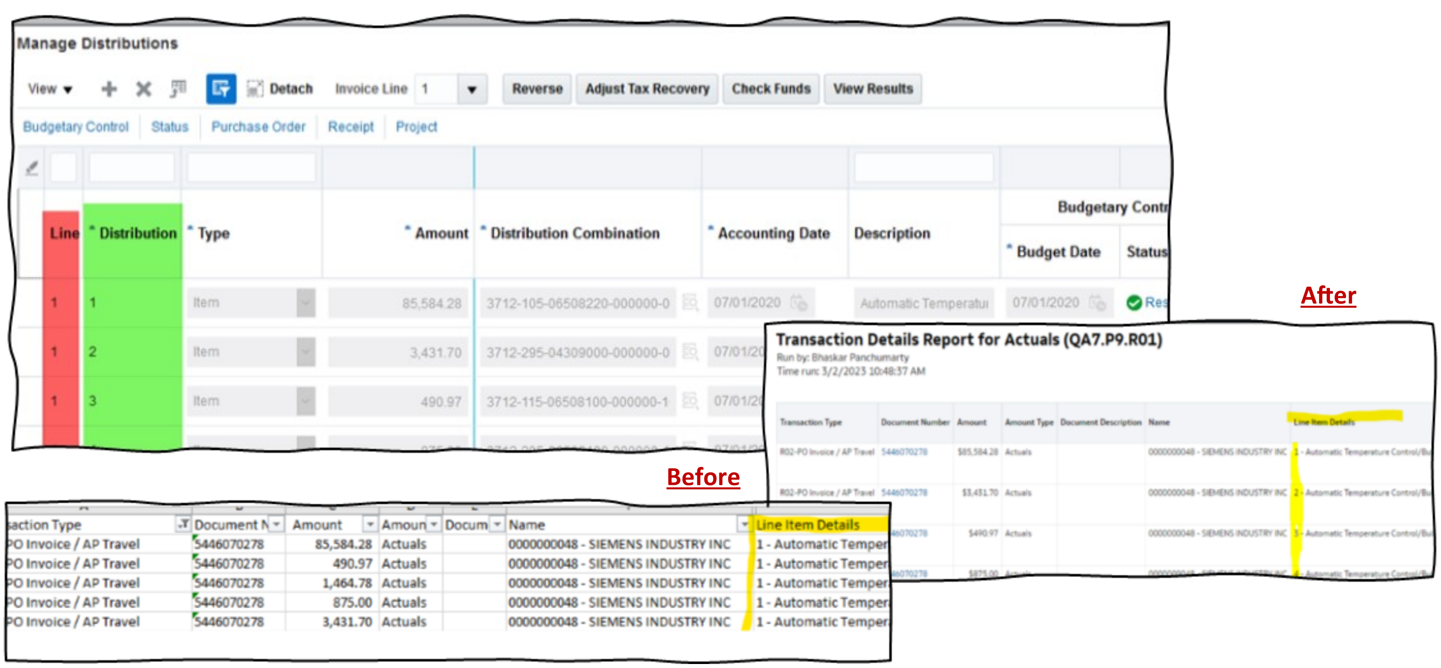
On a Debit Memo, select **Show More** in the header and then **Additional Information**, to enter the Org responsible for approving in the **Org # for Debit Memo Approval Routing** field. This must be done for all debit memos. The [Creating a Debit Memo for an Accounting Transfer] tutorial demonstrates these steps for a debit memo.

If you need assistance with NONPO Invoices or Debit Memos, please email help@umaryland.edu.

Quantum Analytics

PO Distribution Line Number Now Reflected on Transaction Detail Union Report

In the past, when running the Transaction Detail Union report for Transaction Type "PO Invoice/AP Travel", the Line Item Detail column was displaying the "Invoice Line" number from Quantum Financials>Manage Distributions, resulting in multiple amounts for the same line number. Since one PO Invoice can have multiple distribution lines, we have updated this field to display the "Distribution Line Number" from Financials instead, allowing the invoice amounts to be properly displayed as a one to multi line item as opposed to a one to one.



System Updates

Concur Travel and Expense

The Concur Travel and Expense system project team is continuing to bring more schools or departments into the pilot group as we get closer to the go-live date of April 10, 2023. The additional time gained from extending the go-live date has allowed for updates to the training materials and for scheduling additional small group, as well as Traveler and Approver focused, information sessions. Registration for the Traveler and Approver information sessions is available on the Business Applications website at this link. Instructor led classes have resumed and are now open to all employees. Registration is on a first come first served basis at this link. If you are a Travel Administrator and have not completed the four instructor-led classes, be sure to register ASAP. Travel Administrators must complete the classes to be granted the role needed to approve travel forms for your department. For all others, the instructor led classes are encouraged, but not required.

Quantum HCM

In our last update, we introduced the Organizational Risk & Readiness Assessment (ORRA) feedback exercise being facilitated by our Quantum HCM consulting partner, Huron Consulting Group. The assessment was completed and over the next few weeks, the Executive leadership committee will review the ORRA results and the HCM Proof of Concept Deliverable summary including critical gap solution options. Several meetings are scheduled throughout March with stakeholder groups across campus to demo the reporting and analytics capabilities and to share the HCM Proof of Concept and Pre-Implementation deliverables summary. Next steps include identifying additional pre-implementation activities before implementation starts, finalizing the application and consulting support procurements including all required approvals, and deciding on the method for HR Help Desk service delivery.

Funding Source Column Added to Payroll Sponsored Details Report

To be consistent with the data displayed on the Employee Detail report (QA5.P5), a **Funding Source** column has been added to the Payroll Detail-Sponsor report (QA5.P4). With the additional column, individual employee salary and fringe is broken out by "External" and "Over the Cap" which will make it easier to toggle between both reports when reconciling employee salary on grants.

Who are the employees on this budget? (QA5.P4.R1)

Award	Project	Organization	Employee ID	Full Name	Object Code - Description	Funding Source	Job Code
[redacted]	[redacted]	[redacted]	[redacted]		1013~Exempt Staff	External	E3304E
			[redacted]		1012~Faculty 12 Month	External	217502
			[redacted]		1013~Exempt Staff	External	E3314C
			[redacted]		1012~Faculty 12 Month	External	148510
						Over The Cap	148510

Important Reminders

SPAC Child Request DocuSign Email Addresses

SPAC reminds you that to get the best customer service on your Child Request forms you should use your umaryland.edu email address. This allows you to track your document progress via your DocuSign account. Department submitted forms are not considered "Sent" but will reside in your Inbox under your account where you can view and track the progress of your forms. If you don't have a UMB DocuSign account, make sure you sign up for one! Note that if you use your umm.edu email address, the DocuSign form will not store in the UMB DocuSign system, it will reside in the umm DocuSign system and you will not receive the appropriate updates.

State Restriction on Airbnb

On February 27, 2023, a notification was sent out from the Office of the Controller announcing that the State of Maryland issued a directive disallowing the use of Airbnb. University System of Maryland (USM) will be making a determination if the directive applies to USM travelers and, whether it applies to all online accommodation marketplaces such as VRBO, Vacasa, etc. Therefore, effective February 27 and until we have a final USM resolution, travelers should not book Airbnb or similar accommodations for upcoming UMB travel.

eTravel Shut Down

In anticipation of the roll out of Concur, our new travel and expense system, remember that eTravel will be shut down as of April 7, 2023. If your travel request or expense reimbursement is fully approved by April 7, you will not have to re-enter it in Concur. After April 7, eTravel will no longer be available for entering new travel requests and expense reimbursements. As we get closer to that shut down date, departments are encouraged to limit the use of eTravel as much as possible in preparation for the complete switch over to Concur.

Clear your browser cache every day as part of signing into Quantum. Instructions can be found here.

CMAS Drop-in Sessions

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:

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

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

Training

Concur Training News

Concur instructor-led training for Travel Administrators began again the week of March 6 and continues through March 17.

Since January, 325 folks have been trained on Concur! If you are a travel administrator and have not been able to attend, please get registered for the March sessions.

Reminder: Instructor-led training is required for travel administrators to be able to approve travel transactions for their departments.

You can register for Concur classes in the CITS training database. Login with your UMID and then select “Add Course.” For the Course Type, select “Concur Travel and Expense.”

If you need help registering, please email the Concur Training Lead, Laura Pogliano.

Quantum Analytics Training

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. To schedule a time slot for a coaching session, contact Buzz Merrick.

The Next Available Date is: March 31, 2023

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 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. 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 here.

If you need additional information on Quantum training, please email the Quantum Training Team at: DL-BFBusinessApplications@umaryland.edu.