January 18, 2023

UNIVERSITY *of* MARYLAND BALTIMORE

January

PUNCH-OUT!! PROCESS

When using the Punch-Out feature to purchase from a vendor such as Rudolph's Office Supply, always select from the "Deliver To" address option provided in the dropdown menu. Unless designated otherwise, the Requester's office address is the default Deliver-to address. As a precaution the Quantum team asks that you refrain from adding manual entries in the 'deliver-to location' field. It could cause an error.

*Deliver-to Location: 655 W. Baltimore St 7-046

Deliver-to Address: University of Maryland, Baltimore, 655 W. Baltimore Street, Rm. 7-046, Baltimore, MD 21201, UNITED STATES
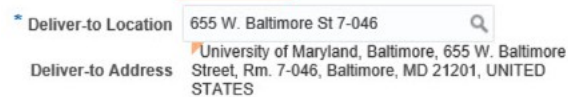
EMPLOYEE ACCESS in QUANTUM FINANCIALS

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.

DIFFERENCES IN FRINGE BALANCES

As mentioned in the December Bytes, there is a slight difference in the fringe balances reported on Quantum Analytics (QA) reports on the Award Detail and/or Transaction Details Union reports in comparison to the fringe balances on the HRMS Payroll Charges Detail reports.

Those differences are due to rounding that occurs in the HRMS system. For a more accurate illustration of the fringe balances, use the QA reports since they are not affected by rounding.

Fully Automated: Invoice Payments

The Quantum Team announces that effective January 9, 2023, a new process that stream-lines invoice submissions went live campus wide!!!! The new automated process aims to reduce the number of manual tasks and provide a more efficient way of payment processing. Two trainings on the new process have already occurred, and the next scheduled training will be held on **January 19**.

This class is highly recommended for anyone with responsibilities in requisitioning, receiving goods and services, processing purchase order invoices, or financial oversight. Visit the Disbursements Website to register for this training and gather more information.

SYSTEM UPDATE

Concur Travel and Expense System

At the end of 2022 several **pilot** departments successfully started using Concur to process their Travel and Business Expense requests and reimbursements. The pilot phase will continue until the system is rolled out to all users starting February 20, 2023. If you missed the third Town Hall, do not worry we have another one scheduled. There's no need to register for this Town Hall just **Click here to join the meeting** on February 07, 2023 at 11 am. The Town Halls are designed to provide an overview of the Concur Travel and Expense system, an update on policy and procedures from the OOTC, and international operations updates from the Global Hub. There were over 240 attendees at the first meeting, and we anticipate even more at the next Town Hall. If you would like to review the slides and/or recordings from the previous events you can do so on the Business Applications website under Presentations.

HCM UPDATE

The QHCM project team is now in the Pre-Implementation Proof of Concept phase, reviewing and solutioning the gaps identified in the Discovery phase. The project team is working with Huron consulting partner to develop POC final deliverables by the end of February 2023.

Listening sessions are scheduled with HR Council members from several schools & departments to discuss the current HRMS system data management and reporting, what works well, and what could be better. The goal is to discuss the HCM project, address concerns, and solicit requests for process improvements.

PCard Expense Itemization

The PCard Expense Itemization feature allows you to reallocate expenses to more than one accounting string.

Remember - when allocating to a sponsored project, you must use the Project (POETAF) fields. Sponsored Sources **cannot** be included in the account combo. As demonstrated in the UPK tutorial - Creating a Multi-Line Reallocation - when you change the reallocation 'type' to itemization, by design the account information automatically includes the default accounting string associated with the PCard, and the option to create a multi-line reallocation appears on the bottom of the page. Visit the UPK for more detailed information and step-by-step directions on this subject.

REQUISITION APPROVER ROLE

If an Approver receives an item in her/his Notifications but is not able to access the transaction document inside Quantum Financials, she/he should **NOT** try to *APPROVE OR REJECT* the item. The Approver has not been granted the required system access which authorizes her/him to approve that transaction.

CAUTION: *Quantum will not notify the initiator if a transaction is Rejected by an Approver who has not been granted the required system access.*

*** The above text has been added under the Policy Violations section of the Invoice Approval and Requisition Approval Email notifications. If you have concerns about which Quantum Financials role(s) you should have, send your inquiry to help@umaryland.edu so the appropriate Quantum support team member can investigate and respond.****

PCard Close Out Process
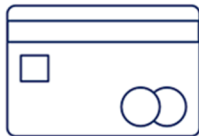
If you don't know the procedure to surrender a PCard for employees who have ended or plan to end employment, look no further. Step-by-step instructions are outlined below.

To return your PCard, please complete the following steps:

1. Read through the PCard Closeout Process.
2. Follow this link to the SSAS Forms site and complete the Account Maintenance form. Ensure that all signatories are completed either by wet-ink or via DocuSign. You may email the form back to the PCard-Admin@umaryland.edu email address when complete.
3. Bring your PCard to the 13th floor of the Saratoga Building on Tuesdays or Wednesdays only. Scheduling your arrival time in advance is highly recommended and preferred. When you arrive at the front desk, please call **Patrice Gardner (x62426) or Jenna Antos (x67696)** and one will meet you up front to collect your PCard.

INTRO to CONCUR

In preparation for go-live in February 2023, the Training Team opened registration for the Concur Travel and Expense system introductory courses campus–wide.

The *Introduction to Concur* **is a mandatory** course for all potential travelers and travel administrators. It is a self-study pre-recorded WebEx that can be taken at your leisure. You can **Step through the tutorials and watch the recording [here](#).** For Travel Administrators, there are 5 additional classes offered that will help you to understand processing transactions in Concur.

Travel Administrators

Registration for Concur instructor led classes

Instructor Led Training is required ffor all Travel Administrators before they can gain access to the system. The training for Travel Administrators will begin January 17, 2023 and run through February 24, 2023. Information on how to register for the five instructor led sessions has been sent to all Travel Administrators.

Please register for *Introduction to Concur* first, because it is a prerequisite for all other Concur courses. You only need to register for one session of each course. After you complete the initial registration, you will receive a confirmation email and a Webex invite from The Quantum Team with the link to attend the Webex.

If you are a traveler or an Approver, but not a Travel Administrator, you can access the training tutorials at any time. You are not required to attend instructor led training.

Special note: **If you were part of the Concur Pilot group with early access, please do not register to take the classes again. The Training Team will be offering Refresher courses in 2023.**

Early Learning Resources

There are early learning resources available on the [Business Applications page](#) for all potential travelers. All of the [UPK tutorials](#) for Concur are accessible from there, along with recordings of the following classes: Introduction to Concur Travel and Expense System, Creating Travel Requests and Creating Travel Expense Reports. Feel free to look at these materials any time. If you have not yet done so, please get started this week. These **Early Learning Resources** are available to compliment the instructor led sessions. Spend some time with these self-study resources now to familiarize yourself with Concur and especially before attempting to register for any other courses.

These courses are designed for early learning and not meant to replace instructor led training for Travel Administrators before campus go-live.

UMB's Travel Agency = Travel Leaders

Concur Travel goes live on February 20, 2023!

With the new system implementation, **Travel Leaders Corp** will be our travel agency partner and the only travel agency accepted for Concur bookings.

As of January 1, 2023, the Globetrotter and Omega UMB travel credit card accounts were closed. To avoid any issues and until Concur goes live, any trips booked using **Globetrotter or Omega** will need to be paid with personal funds.

Annual Role Validation

The annual validation of security roles held in both Quantum Financials and eUMB HRMS is underway. Notifications are being sent to Administrative Deans, Department Administrators or Directors 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.**

System Announcements

Check the System Announcements widget on the *myUMB* portal page for important information on system downtimes for maintenance, planned upgrades, and any unusual system processing schedules for our enterprise applications. This is a good place to go for planning purposes if you are going to use a system outside of normal work hours.

Quantum Financials 23A Quarterly Upgrade

The Quantum support team will be testing 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 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 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

Split purchases on the PCard

Join CMAS for a one-hour session discussing preventing split purchases on the PCard. A brief presentation will cover topics such as the single purchase limit, how to identify/prevent "split" purchases, audit risks/implications, etc. The remainder of the session will offer an opportunity to ask questions and share concerns. There is no registration required for this virtual training just save the link below and create a calendar reminder for yourself.

When: Monday Jan 30th at 2 p.m.
Where: Click here to join the meeting

Questions on other compliance related topics are welcome and could be used as suggestions for future focus topics!

Quantum Analytics

The **Excel @ Analytics Webinar is now available on the Quantum Webex Seminars website** in the Quantum Analytics section: *Excel @ Analytics 2022*. Webinars now incorporate a new WebEx feature – chapters. The Bookmarks icon enables you to navigate specific "Chapters" in the webinar. *For convenience to the end user,* the WebEx recordings have two navigation tools – Transcripts and Bookmarks.

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 topic (s) that users bring to the session.

The Next Available Date will be: January 27, 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