



May 17, 2023



Volume 40, Issue 1

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Quantum Financials



Quarterly Upgrade 23B

The Quantum support team is completing testing for the next quarterly upgrade (23B) for Quantum Financials. Any new features from the upgrade will be available to users effective **5/20/23**. 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.

Reassigning Inactive Employees' PCard Expenses – Coming Soon!

The Quantum support team developed new functionality that will provide an easier method for an inactive employee's outstanding PCard expense transactions to be processed. Once this improvement is rolled out, authorized reviewers (approvers) will be notified via the Quantum Financials notification bell that there are transactions to be processed and can then instruct a reallocation delegate for the inactive employee to process the transactions. This improved functionality will eliminate several manual and inefficient processes. Once testing during the 23B Quantum Financials upgrade is completed this month, detailed instructions with updated training tutorials will be communicated. Look for more information in the June issue of *Bytes*.

"CFDA" will now be "ALN"

In a 2020 update to the Uniform Guidance (2 C.F.R Part 200), the Federal government changed the moniker of the CFDA (Catalog of Federal Domestic Assistance) to ALN (Assistance Listing Number). As part of the 23B upgrade, any references to CFDA will now be ALN throughout the Quantum Financials application. Similar changes to Quantum Analytics will be completed by the end of this month.

Award Profile Card

Status: Closed	Owning School: C100000
Type: 315-C&G- Federal	Owning Department: E1
Billing Basis: LOC	Owning Org: 10417116~
Start Date: 4/1/2013	CFDA Number: 93.242
Adj Start Date: 4/1/2013	Allocated Funding Amou



Departmental Inventory Report – Coming Soon!

The Quantum support team and the Office of the Controller (OOTC) have been working on a Departmental Inventory Report that will be available soon via the Reports dashboard in Quantum Financials. The new report will be used by departments to complete the biennial inventory count of capital assets, which will resume by June 2023. Instructions on how to run and use the report for inventory counts, as well as deadlines for submitting completed counts to OOTC, will be provided to department Inventory Custodians and in future *Bytes* and *Elm* newsletters.

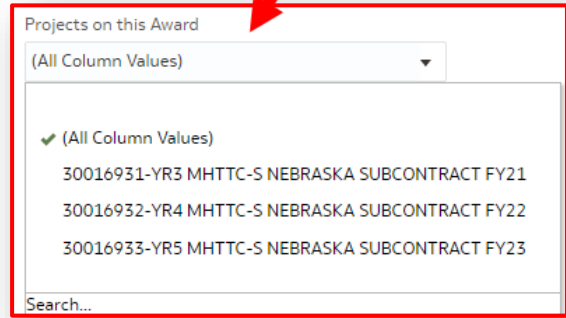
Important Reminder—Fiscal Year-End Deadlines

The FY23 Year-End Deadlines announcement has been posted to the Office of the Controller [Announcements](#) website. Please note the important deadlines. Your cooperation is requested to ensure transactions are properly recorded in the correct accounting period. Adherence to the prescribed procedures is important and exceptions will be limited. The fiscal year ends on Friday, June 30, 2023, and the final balances will be viewable in Quantum Analytics no later than Friday, July 28, 2023.

Quantum Analytics

Selecting Multiple Projects on the Award Detail Report

In response to a request made by an end user, the Award Detail page has been updated to allow for the selection of multiple projects. Prior to this change you could select either one project or all projects under an Award. Now, you can select any combination of projects to get a combined report. For example, if you have three projects under one award, you could now retrieve results for two of the three projects combined. Remember, though, that the project profile card will only display results for the first project you select.



GL Balances Report Column Heading Changes

The column heading and Infotile on the GL Balances (QA6.P1) Report titled "Ending Balance" has been changed to more accurately reflect that it is "Actuals." This is now consistent with the Actuals column on the Budget to Actuals (QA3.P5) Report.

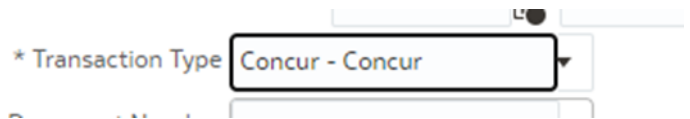


Download (QA6.P1.R1)
23 8:26:51 AM

Unit	Object Code	Object Description	SOAPF Code	Source Code	Source Description	Org Code	Org Description	Activity Code	Activity Description	Purpose Code	Purpose Description	Function Code	Function Description	Unit Description	Future Code	Future Description	Interfund Code	Interfund Description	Budget Amount	Period Activity Amount	Encumbrance Balance	Actuals	Count of Records	
3105	0230	State	105	105	General	13400000	COB Pharm	801170	BUSP Conf	00000000	Unspecified	110	General	00	All State	0000	All Expense	000	Classif	(6150,005.00)	60.00	60.00	(6150,005.00)	1

New Transaction Type

A Concur transaction type is now available for selection on the Transaction Details Union Report. When selected, you will see the transactions related to airfare booked using the University (Ghost/TLC) card.



System Updates

Quantum HCM Project Update

The Pre-Implementation Phase finalizes in June 2023. The HCM project team is currently developing the HCM Implementation strategy and plans to start July 2023. This phase of the project will continue through March 2025 and the estimated go-live date is April 2025. During this time, the focus is on planning, building, designing, testing, and deploying the new system.

Concur Travel and Expense



Booking Train Travel Has Been Disabled

Using the booking tool for train travel in Concur has been disabled. Train travel can and should be added as an Expense Type on the Travel Request, **but you will not be able to book your train travel in Concur**. Instead, book train travel with Travel Leaders Corporation, UMB's travel agency, or outside Concur directly with the train vendor, such as Amtrak.

This only applies to booking trains in Concur, not other booking options/segments, such as hotels or airfare. As a reminder, all airfare **must** be booked in Concur or with the Travel Agent. Hotels and rental cars **can** be booked in Concur, but it is not required.

Continued on Page 3

Important Reminders

- ◆ Do not use **Trip Search** to Book Your Travel - All bookings in Concur need to launch from the approved travel request.
- ◆ Pay attention to the **Booking Type** you select – If you choose Book in Concur but after it's approved you decide you want to Book via Agent Assist, you will have to recall the travel request and change the booking type. If you don't, the request will get stuck in processing.
- ◆ **Never** select PCard as the payment type for airfare – Although PCard can be used to pay for travel expenses like conference registration or hotel, it cannot be used to pay airfare. This is a State-wide restriction and has not changed with the implementation of Concur.

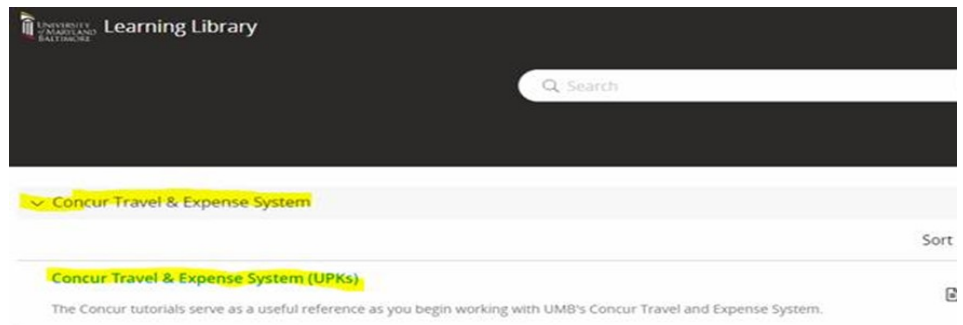


New Payment Type: Third Party Payment

There is a new Payment Type for use in Concur Expense Reports, called **Third Party**. Third Party Payment Type was created to address situations when part of the travel is being paid for by a third party, and part by UMB. For example, when a traveler is presenting at a conference and the conference sponsor will pay for the flight, hotel and registration fee, but not for meals, airport parking or mileage to and from the airport. Instead of submitting an out of state request for just the meals, parking and mileage, travelers can now include all of the expense types but indicate the hotel, airfare and registration will be paid via the Third Party payment method. Although they are included on the expense report, these expenses will not be part of the reimbursement for the traveler. This will benefit Departments who need the ability to capture expenses from a trip that are expected to be paid for by another entity when some of the expenses are paid for by UMB.

New Location for Training Materials

The location of the Concur training materials has been updated behind the scenes and is now available in a Learning Library. When you use the link for Concur tutorials on your myUMB portal, you'll see a new page. Expand the Concur Travel and Expense folder and the course materials are linked inside. You're inside in 2 clicks! Take a peek!



Drop-In Sessions

The Concur Support Team is continuing to offer Drop-In Sessions. Bring your Concur questions to the experts at one of the following virtual sessions!

Wednesday, May 17 – 11 a.m.-noon
Wednesday, May 24 – 11 a.m.-noon

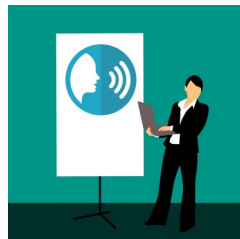
Wednesday, May 31 – 11 a.m.-noon
Wednesday, June 7 – 11 a.m.-noon



Join using this Zoom link <https://umaryland.zoom.us/j/91506298777>.

Concur Training Classes

All four of the instructor led Concur classes are being offered once per month through the Summer and are open to everyone. Check out the [financial calendar](#) for upcoming dates and to register.

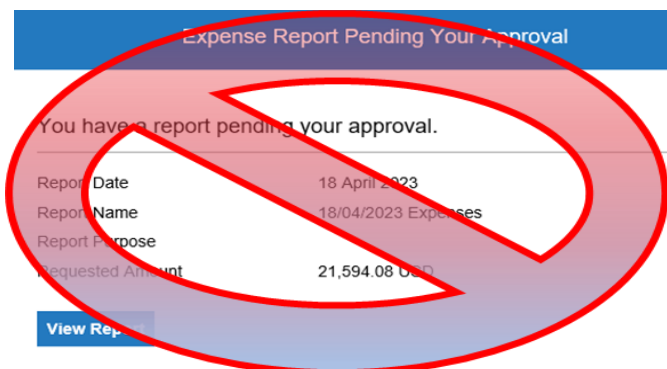
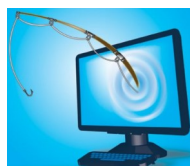


Non-Employee Set Up and Booking Job Aid

A helpful job aid explaining how to set up and book travel for non-employees has been added to the Concur Travel and Expense Training page on the Business Applications [website](#)!

Beware of Phishing emails

We have received reports of approvers receiving phishing emails from an address that looks like Concur, asking them to click on a link to view a pending expense report. If you're just not sure an email you've received requesting an approval is legitimate, you can always check your outstanding approvals from your Concur Approver Dashboard.

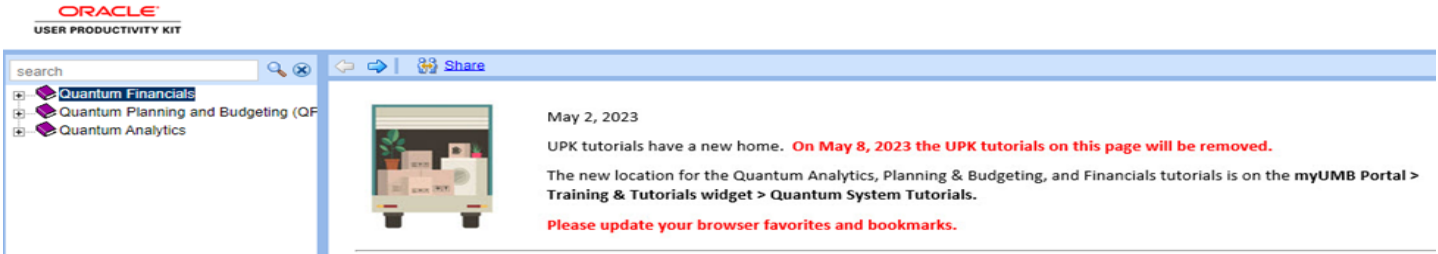


Clear your browser cache every day as part of signing into Quantum. Instructions can be found [here](#).

Training

Moving Day for Administrative Systems Tutorials (“UPKs”)

If you recently searched for a Quantum UPK tutorial, you may have seen this notice:



Known by many as "UPKs," the tutorials you are accustomed to using with UMB's administrative systems transitioned to a new cloud-based platform as of May 1. Only the location of the tutorials has changed for now. How you use the tutorials will remain the same. Eventually the new platform will provide multiple features that you will find useful whether you are new to a UMB system or you are an existing user refreshing on a specific topic. As new features are rolled out over the next few months, details will be provided in the *Elm* and *Bytes*.

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. To schedule a time slot for a coaching session, contact [Buzz Merrick](#).

Recorded Webinars and Workshops:

There are several recorded webinars and workshops available [here](#), including each of the Quantum Analytics Intro classes (All Activities Management, Sponsored Management, Payroll Management). Be sure to check out one or two as a refresher!

Advance registration for Quantum Analytics classes is not required. To access all QA WebEx sessions, use the following to log-in:

<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.

