



June 21, 2023



UNIVERSITY of MARYLAND
BALTIMORE

Volume 41, Issue 1

Find prior issues of
Quantum Bytes [here](#)

Inside this issue:

- Important Reminder—
FYE Deadlines Pg 1
- Quantum Financials Pg 1
- Reassigning Inactive
Employees' PCard
Expenses
- Quantum Analytics Pg 1
- CFDA
changed to
ALN
- System Updates Pg 2
- Quantum HCM
- Join the CMN!
- Concur Travel/
Expense Pg 2
- Drop-In Sessions
- Training Classes
- Important Reminders
- Expenses Incurred on
Behalf of Others Pg 3
- Finding Approved
Requests and Reports
- Exception Booking
- Don't Skip Per Diems
- Mileage for Non-
Employees Pg 4
- Training Pg 4
- Quantum Financials
- Quantum Analytics

Important Reminder - Fiscal Year-End Deadlines

The FY23 Year-End Deadlines announcement is on the Office of the Controller [Announcements](#) website. There are still a few deadlines to be sure not to miss.

FY23 VISA Procurement Card (PCard) Expenses

The expenses for the PCard transactions appearing on the June 27 billing statements (and all prior billing periods) **must be submitted and approved on expense reports by June 30**. You can view your PCard statement between June 28 and June 30 using your US Bank Online Access account.

FY23 RSTARS Transfers

Requests for RSTARS transfers that are **charged to a Project** must be made **by June 28**. RSTARS transfers that are **charged to a GL Account Combo** must be made **by July 7**.

FY23 CBS Bills to UMBF and USMF

CBS bills issued to the UMB Foundation or USM Foundation can be entered with an accounting date and transaction date of June 30 so that revenue is recognized in FY23. These bills **must be entered and completed by July 7**.

FY23 Debit Memos (DMs)

DMs that have **not been approved in OOTC by June 30** will be swept to the July accounting period. DMs created before June 1, but **not approved by the department by June 30**, will be cancelled by OOTC.

FY23 Deposits

For cash receipts to be posted against revenue or receivables for FY23, the deposit **must be submitted to the Cashier's office by 3 P.M. on June 30**. All deposits at the Cashier office are by appointment only.



Quantum Financials

Reassigning Inactive Employees' PCard Expenses—Update

Rolling out new Quantum Financials functionality to provide an easier method for an inactive employee's outstanding PCard expense transactions to be processed, has been put on hold. Additional testing revealed other problems with the potential new process. Instead, the team is focusing on reinforcing efforts SSAS will take to identify these situations and contact authorized reviewers and reallocation delegates to ensure the PCard expenses are properly addressed. Remember, to use the [PCard Closeout Process document](#) available on SSAS's website to minimize the need for time consuming clean-up efforts.

Quantum Analytics



"CFDA Number" has been changed to "ALN"

Within Quantum Financials and Quantum Analytics, references to "CFDA" have been changed to "ALN" to reflect the terminology introduced in the 2020 update to the Uniform Guidance (2 C.F.R Part 200).

Award Profile Card

Status: Active	Owning School: C1000
Type: 315-C&G- Federal	Owning Department: 8
Billing Basis: LOC	Owning Org: 1041903
Start Date: 7/1/2017	CFDA Number: 93.847

Award Profile Card

Status: Active	Owning School: C1
Type: 315-C&G- Federal	Owning Department:
Billing Basis: LOC	Owning Org: 1041
Start Date: 7/1/2017	ALN: 93.847



System Updates

Quantum HCM Project Update

The Quantum Human Capital Management (QHCM) pre-implementation phase is coming to a close this month. The project team is gearing up for the implementation phase to begin July 2023 and continue to go-live, estimated to be April 2025. The implementation phase will follow an iterative approach of design – build – test for each business process. Watch this area of Bytes for monthly project updates and opportunities for you to participate in the process.

Join the Change Management Network!

The Change Management Network (CMN) group partnership was launched to help build a coalition of individuals who could support managing change across the Quantum applications by participating in quarterly meetings where members could provide feedback on development concepts, be involved and weigh in on testing system upgrades, reinforce training and learning, and build support and buy-in with peers.

We are expanding CMN group participation to include subject matter experts (SMEs) in human resource management and payroll processing for the QHCM project implementation phase. This is an opportunity to gain firsthand knowledge and experience with QHCM and future business process changes that will impact all HR functional areas. CMN activities may include:

- Participating in workshops and demos about business processes and system workflows
- Engaging in building, designing, mapping, and testing business processes
- Joining pilot and focus group activities throughout implementation and post go-live
- Volunteering to test new functionality and future quarterly upgrades
- Helping to promote usage and adoption of QHCM amongst peers, including attending educational sessions, townhalls, and training.

If you are an HR and/or Payroll SME and are interested in getting involved, please contact Beth Gallico at bgallico@umaryland.edu to sign up for CMN Group participation.



Concur Travel and Expense

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

June 21 – 11 a.m.-noon
 June 28 – 11 a.m.-noon
 July 12 – 11 a.m.-noon
 July 26 – 11 a.m.-noon

August 9 – 11 a.m.-noon
 August 23 – 11 a.m.-noon
 September 6 – 11 a.m.-noon
 September 27 – 11 a.m.-noon



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.



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.
- ◆ Always go through the approved Concur Request to create the Travel Expense Report. Open the Request, and then click the **Create New Report** button, and go from there.

Concur Travel and Expense

Continued from Page 2

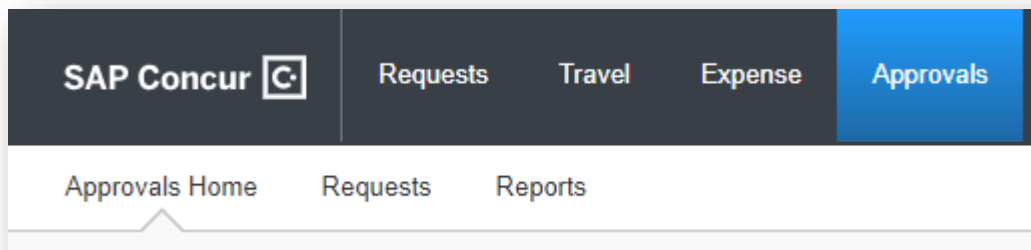
If You Incurred Expenses on Behalf of Others - Did You Know ...?

There is an expense type in Concur called *Reimbursement on Behalf of Others* that can be used to identify expenses you incurred on behalf of others traveling with you. For example, when a faculty member is traveling with students and incurs an expense on the students' behalf.

For details on how to reflect this on your Travel Expense Report, review the Concur training [tutorial](#) or read about the process in the [ELM](#).

Where are the Travel Forms I've Approved?

As a Concur approver, you can see all the requests and expense reports you've approved. Follow these easy steps to find them:



To view all approved **Travel Requests**:

- Navigate to the Approvals tab
- You will see three tabs at the top: Approvals Home, Requests, Reports
- Click **“Requests”**
- Under the drop-down menu for “Limit results to,” select “All Approved Requests”

To view all approved **Expense Reports**:

- Navigate to the Approvals tab
- You will see 3 tabs at the top: Approvals Home, Requests, Reports
- Click **“Reports”**
- Click the blue **“View”** link on the left
- Change the view to **“All Reports you Approved”**

Exception Booking Should be Rarely Used

Exception booking within Concur means the traveler is requesting permission to book airfare outside Concur, which is a departure from UMB Travel Policy. There are very limited reasons to use exception booking and all such requests will route to the Chief Business and Finance Officer (CBFO) for review and approval (or denial). An [exception booking explainer](#) job aid is available on the Business Applications website.



Don't Skip Your Per Diems!

Including per diems, AKA Travel Allowances, on your expense report is done after building your itinerary. Once the itinerary is built, designating which meals to claim is easy as checking boxes. There's a [tutorial](#) to help walk you through setting up Travel Allowances to create Per Diem on your expense report. Don't skip your Per Diem! Just follow the instructions and you'll be a pro in no time.

Travel Allowances For Report: TE2023LP-NYC-Pok

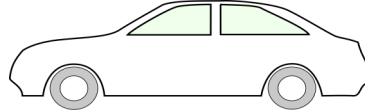
1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Exclude All	Date/Location	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	01/20/2023 New York, New York	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$59.25
<input type="checkbox"/>	01/21/2023 Poughkeepsie, New York	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$53.00
<input type="checkbox"/>	01/22/2023 New York, New York	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$41.00
<input type="checkbox"/>	01/23/2023 New York, New York	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$59.25

Concur Travel and Expense

Continued from Page 3

Mileage for Non-Employees



Non-employees who travel are eligible to be reimbursed for mileage. However, there is a known issue with using the Personal Car Mileage Expense Type on a Travel Request when the traveler is a non-employee. For now, instead of adding the Mileage expense type to a Travel Request, **please use the Miscellaneous expense type**. Manually calculate the mileage using the current gov't rate and enter that Amount on the Miscellaneous Expense Type. The Concur team will let the campus know when the issue has been resolved. Reminder: Non-employees get reimbursed through NONPO Invoices in Disbursements. They are not reimbursed through Concur.



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

Training

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 Business Applications Training Team at:

DL-BFBusinessApplications@umaryland.edu.

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 information:

<https://umaryland.webex.com/join/bmerrick> **Access code:** 730 028 347 **To phone in:** 415-655-0001

