

Budget & In Year Planning Tool Update

Oct 4, 2024

Where We've Been (FY24 - September)

1. **Discovery Sessions** - Conducted sessions with campuses to explore various system designs and identify roll-out considerations.
2. **System-wide Solution Architecture** - Delivered recommendation on system design to Budget Directors created by Performance Architects (our partner)
3. **Implementation Plan** – Established timeline of roll-out milestones for each campus. Most will start using Oracle EPM during the FY27 planning cycle. Amherst will use the projection tool during the FY26 planning cycle.
4. **Pre-Implementation Work** – Met with each campus to review planning by department and revenue & expense categories to ensure continued consistency in planning.

What's Next (October)

1. **Implementation Phase Kick-off** - System-wide team members were gathered and briefed on the project organization, high-level solution architecture, and milestones.
2. **Requirements & Design Sessions** - Individual campuses scheduled throughout October. The first sessions will occur between October 8-10th with the Amherst campus.
3. **Technical Workstream** - Tasks have been identified. During October, the team will address single sign-on and move data from Axiom to Oracle EPM.

More on the Horizon (Fall/Winter)

1. **Iterative Development** - After requirements and design conclude, the project team will implement the system incrementally and share components as they become available.
2. **Change Discussions** - Training and support options will be discussed with campuses teams following the requirements and design sessions.
3. **Peer Analysis** – Research with other institutions on their use of Oracle EPM in the Fall.

Want to Learn More?

- Visit the [Budget & In-Year Planning Tool project website](#) for more information