



TO: Finance & Administration Advisory Group & All Finance Users  
 FROM: Leanne Marden, Controller & Director of Fiscal Operations  
 SUBJECT: FINANCE SYSTEM 9.2 UPGRADE  
 DATE: April 19, 2018

The University of Massachusetts is upgrading its Finance System for all five campuses and the system office at the end of May. Updating the software will help position the university to be able to take advantage of new functionality and keep up-to-date with future software releases. Oracle/PeopleSoft is introducing fluid pages that improve the mobile interface, along with a new navigation bar ("NavBar") and left hand folders and links, changing how users navigate through the application.

Currently, the Finance System upgrade is scheduled to begin on Thursday, May 24 and continue until Wednesday, May 30 at 8:00 a.m. During this time period, the Finance System will not be available. Summit will remain available during the downtime, with data as of Thursday, May 24.\*

In preparation for a smooth transition to the updated Finance System, central finance offices request your assistance in the timely submission of select financial documents to minimize the impact of this upgrade to university staff and departments, as well as our vendors.

Key Date for Action	Item
Wednesday, May 23	TRAVEL AUTHORIZATIONS & EXPENSE REPORTS <ul style="list-style-type: none"> <li>• <i>Must be submitted on-line or delivered to the Controller's Office by 10:00 a.m.</i></li> </ul>
Thursday, May 24 — Wednesday, May 30	FINANCE SYSTEM UNAVAILABLE DUE TO UPGRADE <ul style="list-style-type: none"> <li>• <i>Reporting will be available in Summit w/ data as of Thursday, 5/24</i></li> <li>• <i>Purchase order and payment processing <b>will not</b> be available</i></li> </ul>
Wednesday, May 30	FINANCE SYSTEM 9.2 AVAILABLE (after 8:00 a.m.) <ul style="list-style-type: none"> <li>• <i>Purchase order and payment processing <b>will resume</b></i></li> </ul>

\* Note: For those who attended the Finance & Administration (F&A) Advisory meeting on March 20, the dates have changed from what was presented then.

Thank you for your attention to these important dates. If the schedule changes, you will be notified as soon as possible. Additional information, including job aids and drop-in sessions will be announced shortly. General information about this university-wide upgrade is also provided below, in the "Finance 9.2 Upgrade - What is Changing" section.

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## Finance 9.2 Upgrade — What is Changing

- **Navigation and Overall Functionality**
    - Navigating is now done via homepage icons ("tiles") and the "NavBar", similar to HRDirect.
    - Each tile has a unique collection of folders and links tailored to that function.
    - Navigation is simpler and more intuitive.
  - **Travel & Expense (Employee Self Service)**
    - Ability to withdraw an expense report before it is approved.
  - **Grants & Billing (Research & Sponsored Programs)**
    - Newly delivered features allow us to retire various custom modifications.
  - **Reporting**
    - On the Report Manager List tab, there is now a back button to return to your list.
  - **Job Aids & Documentation**
    - Updated job-aids will be available on the IT and Controller's websites prior to Go-Live.
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