

Kick-Off of 2027 Budget Process & New Budgeting Tool Introduction

Orientation

Prepared for Budget Planners on UMass Boston Campus
November 13, 2025



University of Massachusetts

Amherst • Boston • Dartmouth • Lowell • Medical • Law

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Background on Updated Process & Budget Tool



Why We Are Here

- We have started the planning activities for FY2027 and want to use this opportunity to reiterate the process and tools with you.
- UMass is transitioning to **Oracle Enterprise Performance Management (EPM)** for annual budget planning and in-year projection activities.
- Starting with the upcoming 2027 annual budget season (in January), you will be using Oracle EPM to review your budget forecast.
- This is an orientation with details on upcoming training and budget process expectations.

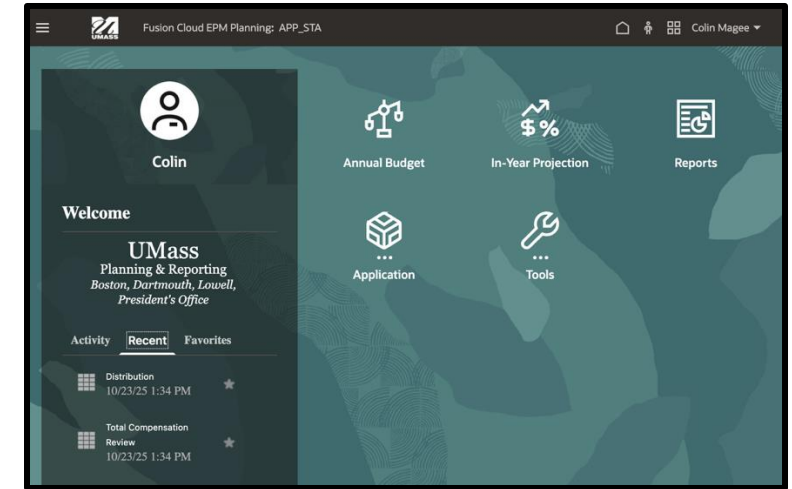
Budget Tool Modernization Background

- In 2023, UMass identified the need for improved processes and tools for budget management
 - Inconsistent implementation of Axiom (UM-Plan) across the system
 - Poor communication, training, and support for existing tools
- Oracle Enterprise Performance Management (EPM) was selected as the new system-wide budget and in-year analysis tool
 - Differentiated by its extensive use in higher education, particularly in large, complex, multi-campus organizations
 - Robust features and capabilities
- Performance Architects was chosen as the implementation partner
 - Sole focus is on Oracle EPM implementations, focused on higher ed
 - Extensive higher ed experience, staffed to support UMass



What is Oracle EPM?

- **A modern, cloud-based platform** that enables forecasting and collaboration across UMass's different structures, funding models, and budgeting needs
- A **common platform** for budgeting and forecasting that supports standardization across UMass while configuring to unique campus needs
- **Integrated with other UMass platforms** including PeopleSoft HR, Oracle Narrative Reporting and identify management



The screenshot displays a detailed view of the 'Annual Budget - Non-Personnel by Department and Fund Input-PO'. The interface shows a table with columns for Department, Fund, and Budget Account Category. The table is filtered by Department 'PLANNING_& DELIVERY' and Fund 'UMCEN_UMPO Dept Funds - All Other'. The table lists various budget items with their corresponding department and fund codes, and their budget account categories. A 'Total Revenue' section is also visible at the bottom of the table.

Department	Fund	Budget Account Category
C816345000 - UITS-Operations/ProductionSvc	51378 - UITS Central Project Allotment	Fund Additions
	51443 - Central Admin Allotment	Fund Additions
C816335000 - UITS-Client Technology/Services	51443 - Central Admin Allotment	Other Revenue (OM)
		Fund Additions
C816325000 - UITS-Project Management Office	51443 - Central Admin Allotment	Fund Additions
C816380000 - UITS-Digital Experience	51377 - UITS_BDL Student Sys	Other Non-Operating (OM)
	51443 - Central Admin Allotment	Fund Additions
Total Revenue		
C816345000 - UITS-Operations/ProductionSvc	51378 - UITS Central Project Allotment	Consulting Services
	51443 - Central Admin Allotment	Supplies & Services
C816335000 - UITS-Client Technology/Services	51443 - Central Admin Allotment	Supplies & Services
		Equipment Leased/Purch./Maint.
C816325000 - UITS-Project Management Office	57910 - Accrual Plant NIP	Depreciation

UMass's Transition to Oracle EPM

Axiom: UM-Plan (FY2026 and Prior)



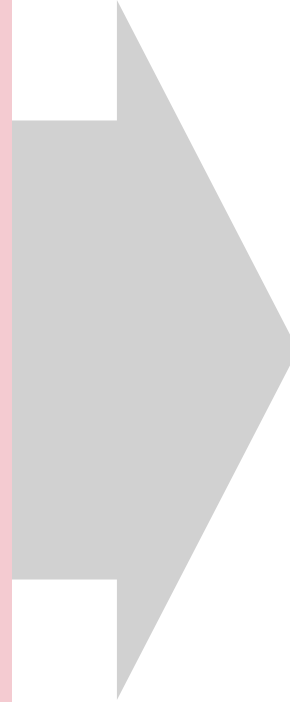
Hosted program with limited configurability and innovation



Separate planning files.
Lots of Excel



No In-Year Planning
Adjustments



Oracle EPM FY2027 - Onward

ORACLE
ENTERPRISE PERFORMANCE
MANAGEMENT CLOUD



Modern cloud best-of-breed platform



Single interactive tool
for budget planning



In Year Planning
always available

Budget Tool Preview



Colin

Welcome

UMass

Planning & Reporting
*Boston, Dartmouth, Lowell,
President's Office*

Activity

Recent

Favorites



Distribution
10/23/25 1:34 PM



Total Compensation
Review
10/23/25 1:34 PM



Annual Budget



In-Year Projection



Reports



...

Application



...

Tools



Annual Budget

In-Year Projection

Reports

Annual Budget - Non-Personnel by Fund and Department Input-PO



Actions ▾

Save



PO Department Funds

UMCEN_UMPO Dept Funds - All Other

Department

PLANNING_&_DELIVERY



	FY27	FY27
	Budget	Budget
	▶ YearTotal	X-----X
	Standard	Commer

Fund	Department	Budget Account Category		
51378 - UITS Central Project Allotment	C816345000 - UITS-Operations/ProductionSrvc	Fund Additions		
51377 - UITS_BDL Student Sys	C816380000 - UITS-Digital Experience	Other NonOperating (OM)		
51443 - Central Admin Allotment	C816345000 - UITS-Operations/ProductionSrvc	Fund Additions		
	C816335000 - UITS-Client TechnologyServices	Other Revenue (OM)		
		Fund Additions		
	C816325000 - UITS-Project Management Office	Fund Additions		
	C816380000 - UITS-Digital Experience	Fund Additions		

● Budget Input - Dept and Fund (...)

● Budget Input - Fund and Dept (...)



Annual Budget

In-Year Projection

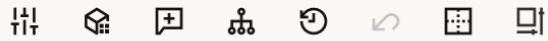
Reports

Annual Budget - Non-Personnel by Fund and Department Input-PO



Actions ▾

Save



PO Department Funds

UMCEN_UMPO Dept Funds - All Other

Department

PLANNING_&_DELIVERY



FY27

FY27

Budget

Budget

▶ YearTotal

X-----X

Standard

Commer

Fund	Department	Budget Account Category		
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Budget
Details Here

● Budget Input - Dept and Fund (...)

● Budget Input - Fund and Dept (...)



Annual Budget

In-Year Projection

Reports

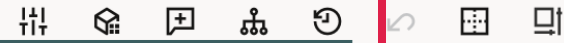


Annual Budget - Non-Personnel by Fund and Department Input-PO



Actions ▾

Save



Workforce Budget Detail

UMCEN_UMPO Dept Funds - All Other

Department

PLANNING_&_DELIVERY



FY27

FY27

Budget

Budget

▶ YearTotal

X----->

Standard

Commer

Navigate across workflow Steps and Forms

Fund	Department	Budget Account Category		
51378 - UITS Central Project Allotment	C816345000 - UITS-Operations/ProductionSrvc	Fund Additions		
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- Budget Input - Dept and Fund (...)
- Budget Input - Fund and Dept (...)

2027 Annual Budget Process

FY27 Annual Budget Process

- Targets and all other funds preloaded based on high level budget planning assumptions
 - Budgetary Units will not enter or change data, but will have access to view reports and detailed budget forms
- Budget office will provide a template presentation at the VC level including key financial data that will be used during budget hearings once completed
 - Slides will include GOF target, roster report, division level expense detail, department level expense detail, total revenue & expense by fund code
 - VC areas will work with the budget office to complete slides (meetings between business managers and budget office) on operating initiatives, expense/revenue drivers, strategy, high level requests/contractual increases
 - Business managers will keep their VC up-to-date and engage with departments to gather required information
 - NOTE: Academic Affairs will go through this process at the Provost level, colleges and other budgetary units will report budget information to the Provost through their normal process

Timeline & Training



Training & Support Overview

- Instructor led training on Oracle EPM will be provided in December (date: TBD)
 - Two live sessions to be scheduled in December
 - Recorded version for offline viewing
- Training is strongly encouraged
- During January, drop-in sessions and additional support will be offered from the Budget Office
- Stay tuned for updates via email and on the Boston Budget Office website

What to Expect Next

Next Steps

- Stay tuned for calendar invites for training
- Start working on budget in January
- If you have questions between now and training, contact Teresa

Questions?

