University of Massachusetts

UM-Plan on AWS AppStream

Quick Reference Guide

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Brief Overview

What is UM-Plan? And what is AppStream?

UM-Plan is a cloud based software product purchased by the University for the purposes of budgeting and forecasting. At the time of implementation, UM-Plan provides minimal support for Mac based users. In an effort to provide this product offering to our Mac based user community, the University has elected to utilize a product on Amazon (AWS) called AppStream.

AppStream offers the ability to stream published applications down to the user through a web browser. What this means is that you (the user) would be able to access UM-Plan through a web browser on any device.

Logging on for the first time

To launch UM-Plan on AppStream, go to the https://umassp.edu/connect page. **Note:** for Amherst users, you will need to use the following url and the next two screenshots are not applicable:

https://webauth.umass.edu/idp/profile/SAML2/Unsolicited/SSO?providerId=https://sm-prd11.ucollaborate.net/oam/fed&target=http://massachusetts.edu/axiom

Select the 'UM-Plan: Strategic Financial Planning & Analysis Tool' hyperlink under the Finance section.

You will be taken to the UM-Plan launch page. Select the 'UM-Plan Login (for Macs)' hyperlink under the Login section.

You will see a familiar logon screen. Go ahead and enter your regular UMass credentials here. Remember to select the appropriate domain from the list:

Next you will be redirected to a page that looks similar to the following:

Go ahead and click on the "E" icon with the word UM-Plan written below it. The icon is for Amherst users only.

Next, a session for UM-Plan will be allocated for you. You will see a progress graphic indicating that your resource is starting up.
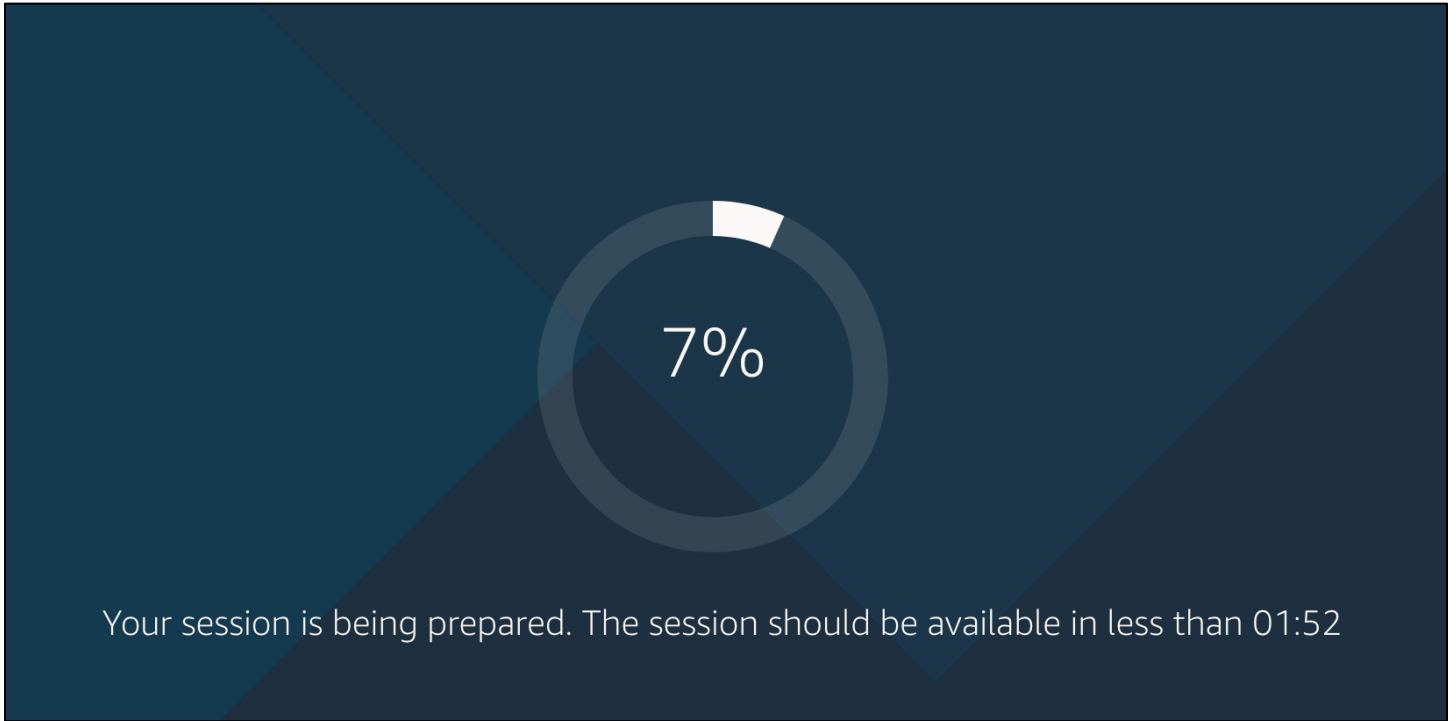
Next, you will be presented with a browser session for UM-Plan. You will again be presented with a familiar login screen. This is normal. Please go ahead and enter your credentials here. Please remember to select the correct domain from the dropdown list.

You will be redirected to UM-Plan.
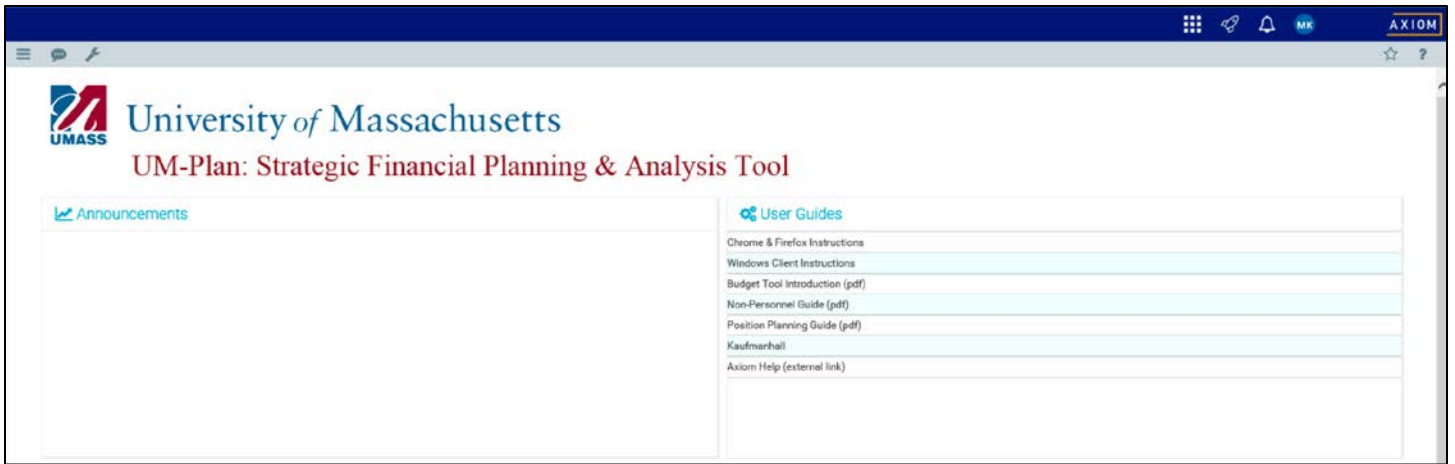
AppStream Environment Quick Reference

When using UM-Plan on AppStream you will notice a number of icons

The Grid Icon

(or waffle as it is politely referred to in some circles) provides you with a list of applications you have access to within AppStream. At the time of this document, only UM-Plan is available, so that is likely all you will see.
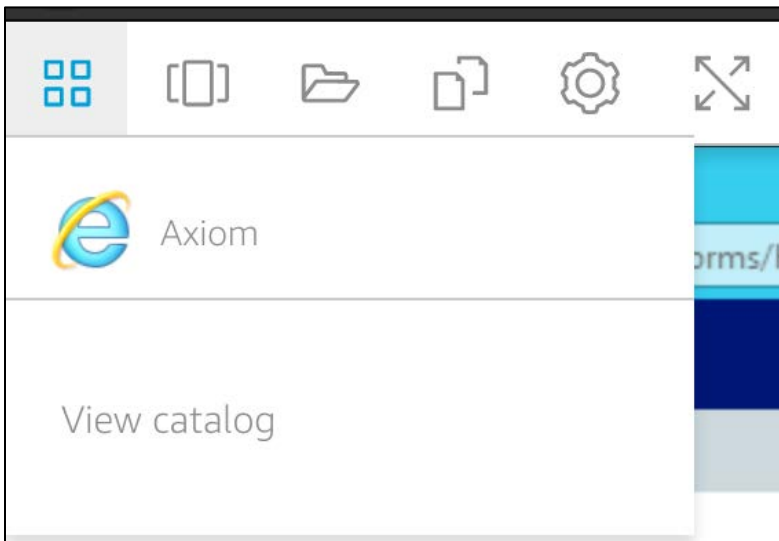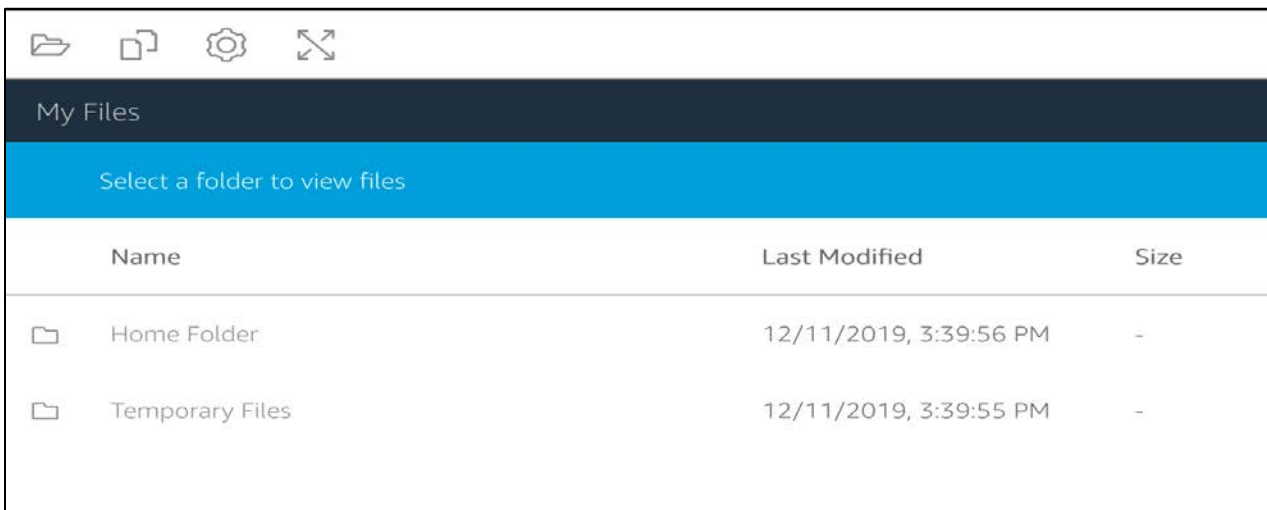
The Switch Windows Icon

This would be used if you were running more applications than just AppStream. This gives you the ability to toggle between them from within a browser window.
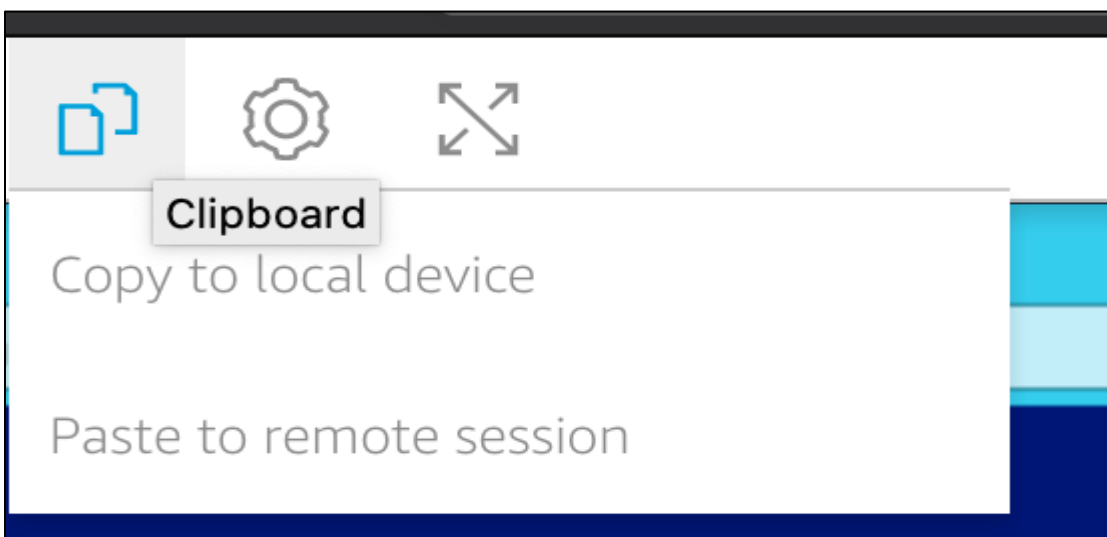

The Folder icon

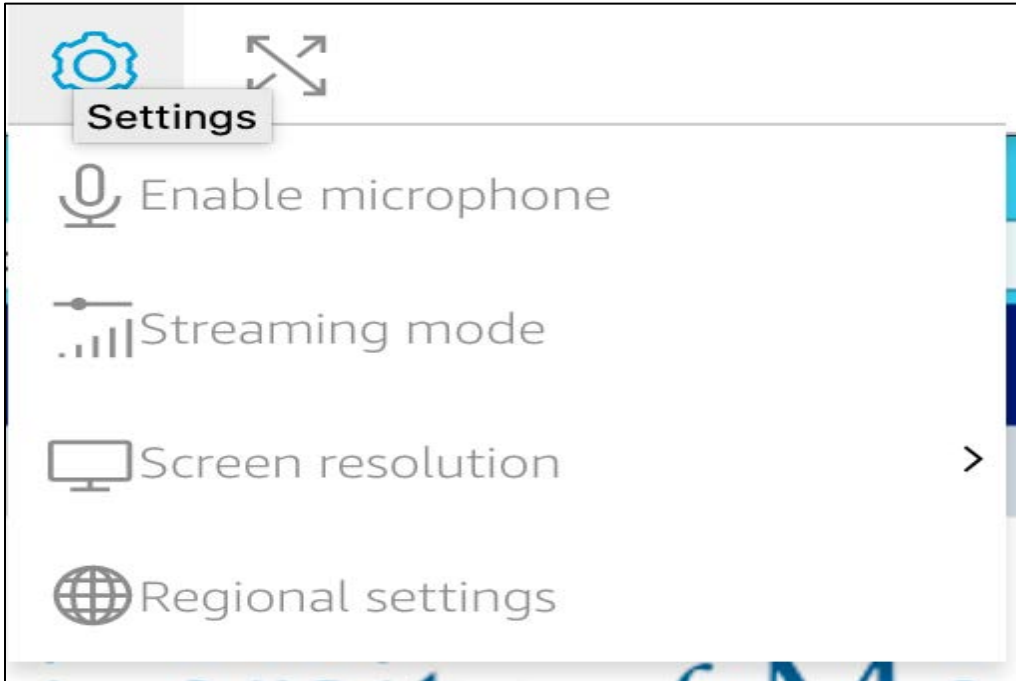Allows you to upload and download files from within your session.

The Clipboard icon

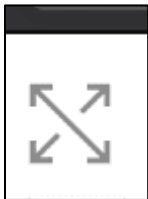Allows you to copy things like text in or out of your session.

The System icon

Allows you to manage a few system settings related to your session.

The Full Screen icon

Allows you to expand your viewing area to a full screen view.

The Profile icon

Allows you to end your session. This is the recommended action when you are done working with UM-Plan for the day.