



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.

The screenshot shows the 'Connect To' page on the University of Massachusetts Office of the President website. The page is titled 'University Services' and 'Connect To'. It provides a list of services categorized into Business Intelligence, Finance, Student Administration, Password Management, Business Process Review, and Operational/Project Tools. The 'UM-Plan: Strategic Financial Planning & Analysis Tool' link is highlighted with a red box under the Finance section.

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University Services

Connect To

The Connect To page provides University employees with access to key shared applications and services. Any applications or services that are not shared across all five campuses and the President's Office have one or more campus initials next to them denoting which campuses utilize the service (Legend: B = Boston, D = Dartmouth, L = Lowell, M = Medical School, P = President's Office). Amherst campus users must log in to applications via appropriate campus launch pages.

- Business Intelligence**
 - [Summit](#)
- Finance**
 - [Finance Production](#)
 - [Subscribe to the Fin Daily Status Report](#)
 - [Effort Certification](#)
 - [UMass BuyWays](#)
 - [UM-Plan: Strategic Financial Planning & Analysis Tool](#)
- Student Administration**
 - [Student System \(B,D,L\)](#)
 - [Subscribe to the SA Daily Status Report](#)
 - [Document Imaging WebNow \(B,D,L\)](#)
- Password Management**
 - [DUO Self Service \(P\)](#)
- Business Process Review**
 - [We Are Better Together](#)
 - [E & E Task Force](#)
- Operational/Project Tools**
 - [Chartfield Lookup](#)
 - [Citrix Web Desktop](#)
 - [Confluence \(UITS\)](#)
 - [Dropbox](#)
 - [IT Service Cloud \(P\)](#)

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

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Overview
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UM-Plan: Strategic Financial Planning & Analysis Tool

The UM-Plan Strategic Financial Planning & Analysis Tool allows you to prepare your budget online and submit it to the Budget Office with a click of a button. This tool is easy to use, removes the need for traditional excel budget templates, and reduces the overall time for budget processing at the University. If you have any questions, please feel free to [contact us](#).

Login

- [UM-Plan Login \(for Windows\)](#)
- [UM-Plan Login \(for Macs\)](#)

Initial Setup Resources

- [Install the UM-Plan Windows Client](#)
- [UM-Plan Google Chrome and Firefox Add-ons](#)

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:

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Secure Access Login

Campus User ID

Password

President's Office

Login

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

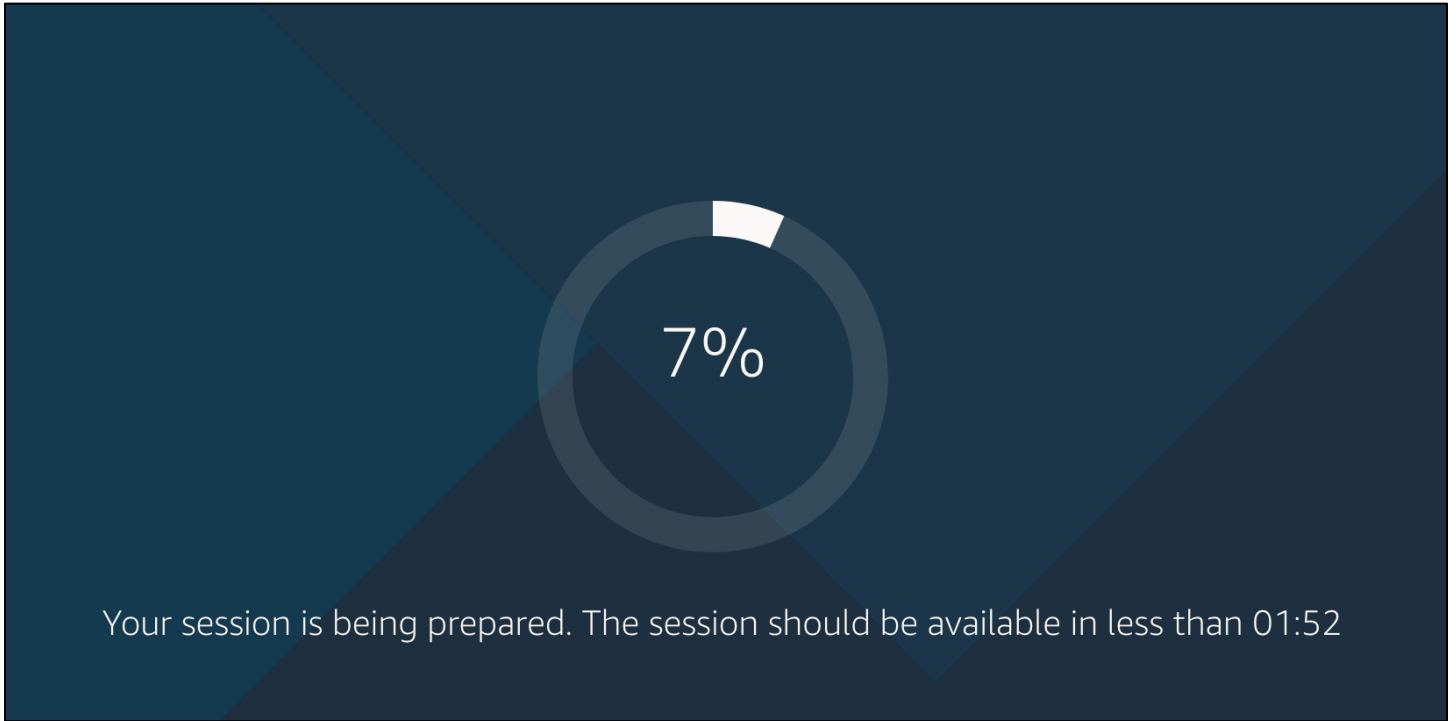
amazon
AppStream 2.0

Choose your app to get started

UM-Plan UM-Plan (Amherst)

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.

The form is titled "Secure Access Login" and is located on the University of Massachusetts website. It features three input fields: "Campus User ID", "Password", and "President's Office" (a dropdown menu). Below these fields is a blue "Login" button. The University of Massachusetts logo is visible in the top left corner of the page.

University of Massachusetts

Secure Access Login

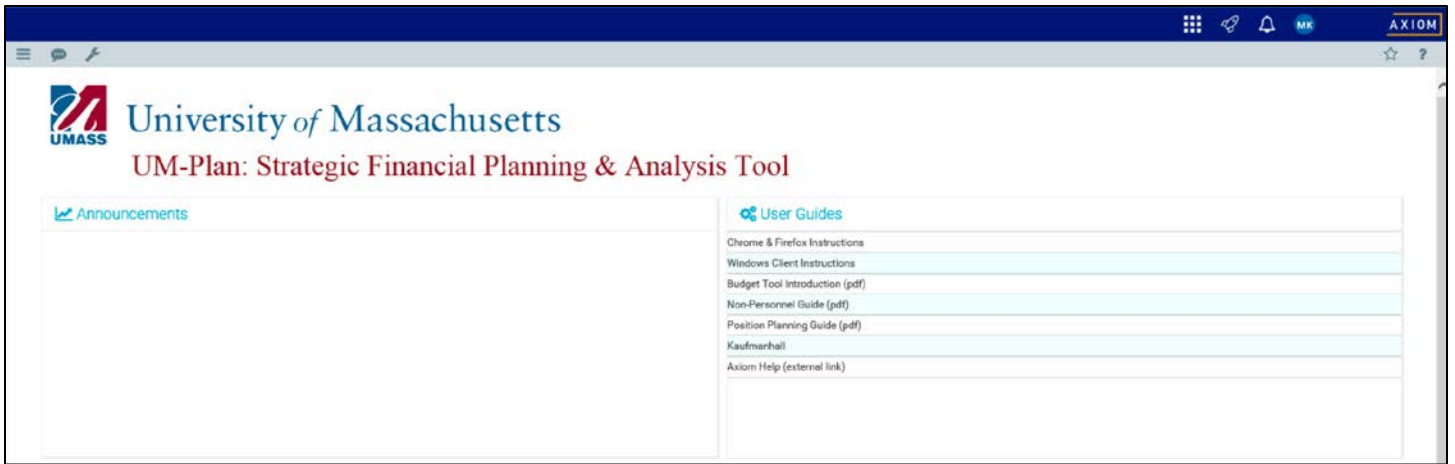
Campus User ID

Password

President's Office

Login

You will be redirected to UM-Plan.



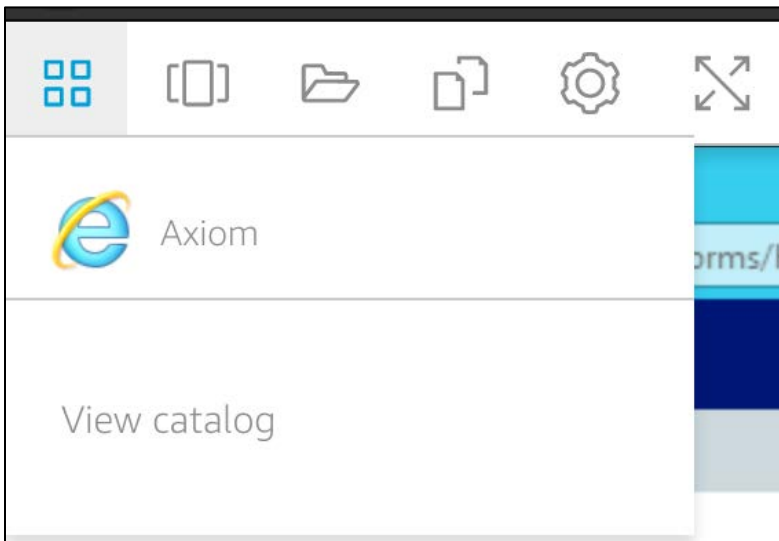
AppStream Environment Quick Reference

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.



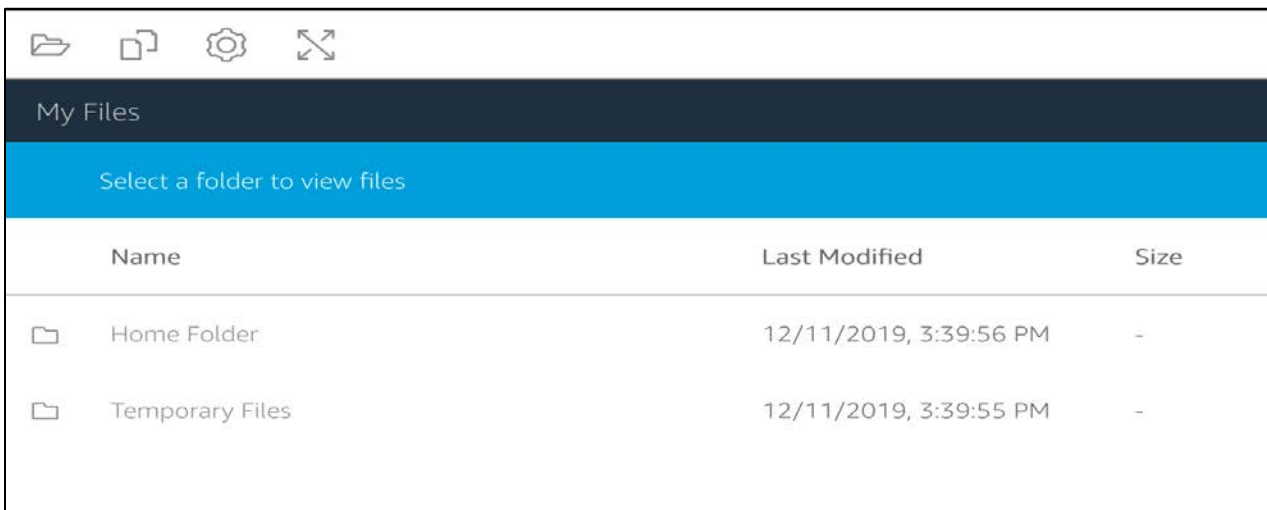
The Switch Windows Icon

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.



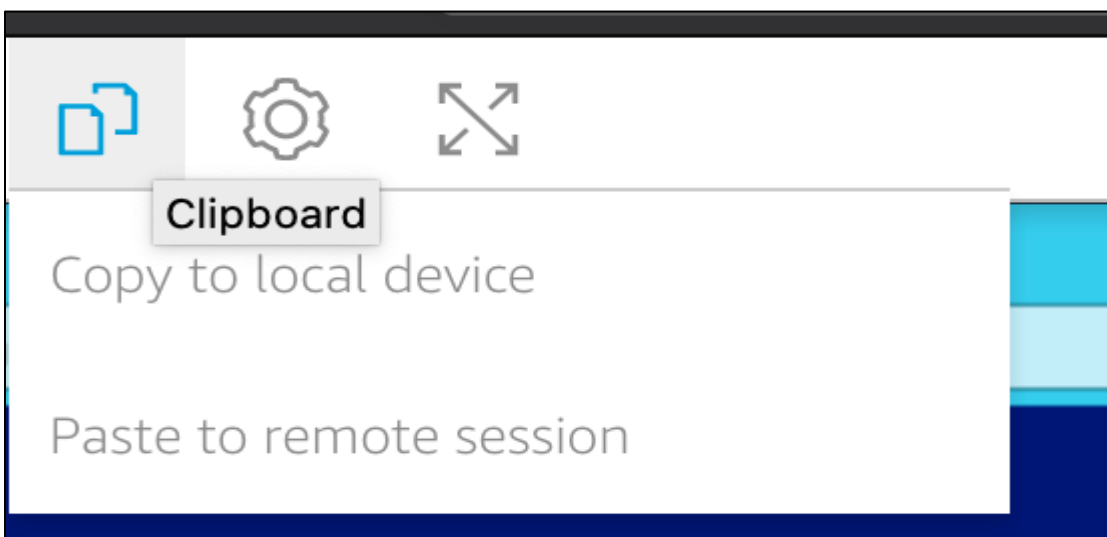
The Folder icon

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



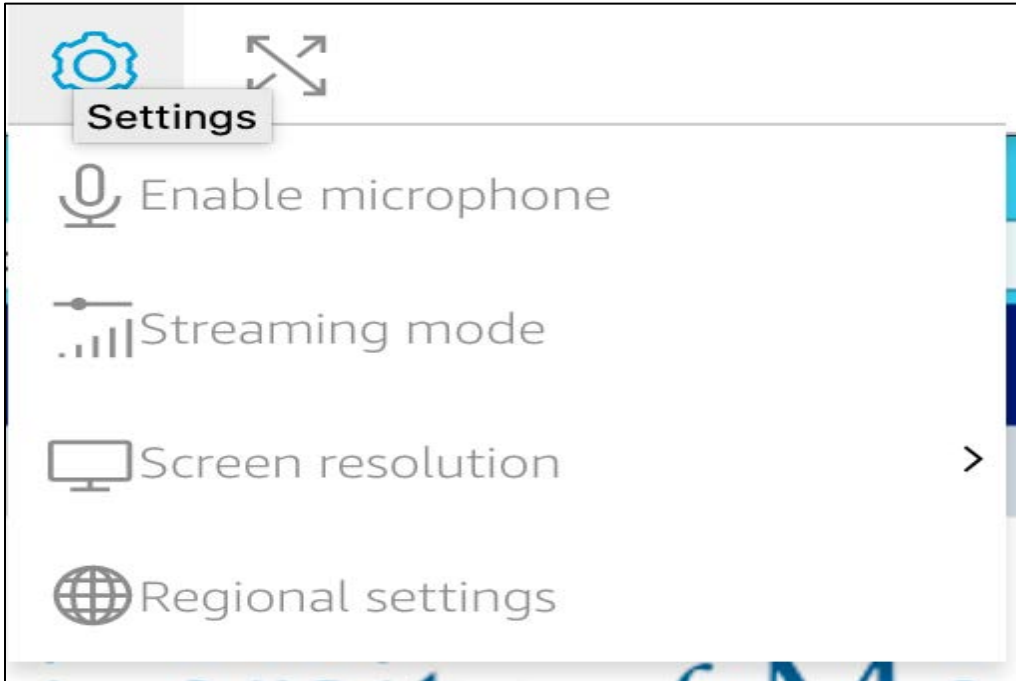
The Clipboard icon

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



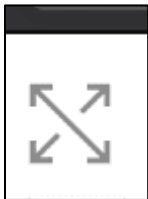
The System icon

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.

