Overview:

As part of the Financial Systems Transformation (FST) Program, in conjunction with the implementation of the Oracle Cloud ERP suite, an analysis of campus shadow systems kicked off in March 2022, to identify which systems would require retrofitting and which would be replaced. In this analysis, the University reviewed a list of 139 ancillary systems currently used across campus that impact financial and financial reporting operations, and any systems identified as "non-financial" were noted as out of scope for this project.

Key Terms/Definitions:

- **Retain – Retrofits Required** – Retaining of an existing software solution, with modifications to ensure integration with Oracle Cloud ERP
- **Retain – No Retrofits Required** – Retaining of an existing software solution, determined no modifications necessary
- **Sunset/Replace –** Systems identified as no longer necessary as their functionality will be consolidated by one of the following 4 main categories:
  - *Oracle Budgeting & Planning* - Go-Live on 2/16/24
  - *Oracle Cloud ERP*– Go-Live on 7/1/24
  - *Third-Party system* – a replacement system outside of Oracle Cloud
  - *Orbit* – Datawarehouse and reporting
- **Peripheral Application** – An application indirectly impacted by the implementation of Oracle Cloud ERP/will not integrate with Oracle

If you do not see an application used by your unit on this list, it is likely either an indirectly impacted system OR out of scope.

Systems Status Overview:

System	System Business Owner	Owning Unit
System Status: Retain – Retrofits Required		
Phoenix	Rob Jones	VP, Alumni Relations, and Development (ARD) / ITS
Academic & Administration Data Warehouse (AADW)*	Brian Schinker	Biological Sciences Division (BSD)
AIMS (ARC)	Angela Wilson, George Langan	
ARTEMIS	Melissa Byrn	
MyCRI	Thorbjorn Axelsson	
EPIC	Drake Schrode, Mamoon Nawabi	BSD (UCPG)/UCM
Transact (formerly Cashnet)	Arthur Lundberg, Jennifer Waters	Campus and Student Life
EHSA – Health and Safety	Sa-Lin Bernstein, Heather Sims	Environmental Health and Safety (EHS) & Office of Research Safety (ORS)
Archibus	James Cook	Facilities
eBuilder	Aruthur Del Muro	
Fuel Master	Charles Maher	
Maximo	Brian Cowperthwaite	
Yardi (including Rent Café)	Jayme McGriffin	
AIS	Jennifer Waters	ITS – (supports multiple units)
AURA	Jennifer Ponting	
eShip Global	Diane Stanek, Ron Welin	
OptiFreight	Diane Stanek, Ron Welin	
Fundriver	Ron Kosary	
Workday	Jim Hamaguchi	
Pinnacle	Dylan Westring, Daniel Rusnak	
ServiceNow	Dan Rusnak	
FOLIO	Scott Perry	Library
Minuet	James Licklider, Robert Reardon	Polsky Center
FACTS	Brian Lipinski, Brent LaRowe, Brian Hewlett	Laboratory Schools
CMS	Erik Sorensen	UCM
Legal Tracker	Martina Soltan, Catherine Goldthrope	
CISPUB (includes Shopping Cart)	Christopher Heiser	University Press
Concur	Deb Cavey	VP and CFO
EasyAccess	Patti Ferriter	
PaymentNet*	Jacqueline Flanagan	
PaymentWorks	Patti Ferriter	
Legal Tracker	Tambra Black	VP and General Counsel
Destiny One	Shalana Thompson	Graham & UCPE
System	**System Business Owner**	**Owning Unit**
System Status: Retain – No Retrofits Required		
Asset Panda (Asset Management Tool – AMT)	Eric Dover	Biological Sciences Division (BSD)
Device42	Thorbjorn Axelsson	
eComet	Scott DeBlaze	
OSRF Billing System	Angela Wilson	
ProLease	Scott DeBlaze	
Insight BudgetFinance	Qunfang (Florence) Wu, Paul Cronin	
cVent	Angela Tong	
Amadeus (formerly Delphi)	Sarah Gusanders	Booth
Booth Accounting Database *(some modules sunsetting)*	Manisha Chaudhuri	

Questions/Concerns? Reach out to the Retrofits Team:

Liz Timoszyk, Huron Retrofits Lead: t-9timos@uchicago.edu
Dave Richardson, UChicago Retrofits Lead: t-9drich@uchicago.edu

System	Business Owner	Owning Unit
Microsoft Dynamics (CRSP Accounting Portal)	Jennifer Haffner	
B2G / LCP Tracker	Ryan Johnson	CRSP (formerly Booth)
Building Cost Tracking	Charles Maher	Facilities
Energy Cap	Brian Bozell	
EZMaxMobile	Brian Cowperthwaite	
EZPlanner	Brian Cowperthwaite	
ION	John W Kerkemeyer	
SDIxChange	Brian Cowperthwaite	
VFA	Charles Maher	
Asset Tiger – ITS	Phillip Lifka	ITS – (supports multiple units)
UiPath	Kathy Pokonosky	
OnBase *(OnBase eLedgers and ePayments modules sunsetting)*	Rocio Garcia, Hema Preetha	
ProdShop	Ray Parpart	
Jumbula	Brian Lipinski	Laboratory Schools
Greater Giving	Brian Lipinski	
SchoolAdmin	Brian Lipinski	
Facility Tracker (Excel)	Murad Goziev	
AirTable (formerly Salesforce)	Kye Hanna	Polsky Center
PUBS	Christopher Heiser	University Press
Rights & Permissions	Christopher Heiser	
SIRS	Christopher Heiser	
TMM	Christopher Heiser	
Literatum	Christopher Heiser	
CRIS	Carla Bucci	VP and CFO
Yardi	Taissa Bielaga	Commercial Real Estate Operations (CREO)
Humanities Commitments – File Maker Pro System (DOS)	Matthew Hess	Humanities Division

*Peripheral system; not included in Ancillary System Retrofits Required count

System	System Business Owner	Owning Unit	Sunset Date	Replaced By
System Status: To be Sunset / Replaced				
Projecto	Brian Schinker	Biological Sciences Division (BSD)	7/1/24	Third Party System
360 (FAMIS/Accruent)	Kari McDonough		7/1/24	Third Party System
Quick Books (conference center)	Steven Krause	Booth	7/1/24	Oracle
Core Cashiering Systems	Arthur Lundberg	Campus and Student Life	7/1/24	Oracle
Facilities Invoice Tracking	LaKeesha Carter	Facilities	7/1/24	Oracle
Humanities Telecom Charges	Matthew Hess	Humanities Division	Non-FST Timeline Date	Third Party System
ACCTS – Account Create, Cost Transfer, ACCTS Maintenance, RDF Automation, Lookup	Casey Campbell Maru Mendoza	ITS – (supports multiple units)	7/1/24	Oracle
PETS	Jim Hamaguchi Ron Kosary		7/1/24	Workday
APS	Patti Ferriter		7/1/24	Oracle
EDI	Ron Welin		7/1/24	Oracle
Business Objects (only partially sunsetting)	Abdul Mohammed		2/16/24	EPBS (Oracle), Oracle, Orbit
BuySite (Jagger)	Debra Cavey		7/1/24	Oracle
Capital Projects Budget Request (CPBR)	Amy Koh		2/16/24	EPBCS (Oracle)
FOCUS	Jim Hamaguchi, Ron Kosary		7/1/24	FOCUS
GEMS Apply	Jackie Flanagan, Mark Bieri		7/1/24	TBD
ITS Request	Elise Covic		7/1/24	TBD
MOPS	Debra Cavey, Mark Bieri		7/1/24	Oracle
BuySite User Maintenance (BUM)	Mark Bieri		7/1/24	Oracle
OnBase – eLedgers *(Reports available in read-only)*	Maru Mendoza		7/1/24	Oracle
OnBase – ePayments *(Reports available in read-only)*	Deb Cavey, Rocio Garcia		7/1/24	Oracle
PMS	Kathy Conrad		7/1/24	Oracle
TSO	Jim Hamaguchi, Ron Kosary		7/1/24	N/A
Excel	Lisa Williams	Social Sciences Division	7/1/24	Oracle
File Maker Pro – Commitment	Lisa Williams		7/1/24	TBD
File Maker Pro – Dean of Students	Lisa Williams		7/1/24	Third Party System
Financial and Budget Reporting	Murad Goziev	Strategy and Innovation	2/16/24	EPBCS (Oracle)
Quick Books	Murad Goziev		7/1/24	Oracle
Asset Tiger	Murad Goziev		7/1/24	Oracle
Research Accounts Tracking System (RATS)	Katherine Karvunis	The College	7/1/24	Oracle
Quick Books – Billing	Lynda Rudek	Urban Educational Institute (UEI)	7/1/24	Oracle
FileMaker Database *(partially sunsetting)*	Jackie Flannagan	VP and CFO	7/1/24	Combination of Data Warehouse and Oracle
Excel – Weekly KPI Report	Violet Li	VP for Communications	2/16/24	EPBCS (Oracle)
Harvest Project	Violet Li		7/1/24	N/A
Active Planner (Budgeting)	John Sanchez	VP, Alumni Relations, and Development (ARD)	7/1/24	Oracle

System	System Business Owner	Owning Unit
System Status: Out of Scope (Non-Financial)		
MaxGold		UCM
Quartzy	Angela Wilson, George Langan	BSD
Smartsheet		BSD
Apogee	John Kerkemeyer	Facilities
Engraver Pro	Charlie Maher	
KeyWatcher	Charlie Maher	
Metasys	Marcus Patterson, John Kerkemeyer	
Tridium	John Kerkemeyer	
Wonderware	John Kerkemeyer	
Delta	John Kerkemeyer	
Humanities Academic Appointment Tracker	Matthew Hess, Don Dunbar	Humanities Division
Microsoft Office on Box	Matthew Hess, Don Dunbar	
WorkOtter	Dave Richardson	ITS
SIA *(note – in scope for peripheral retrofits)*	Daniel Barrett, Surya Kadali	
Basecamp	Brian Lipinski	Precollegiate Education
PowerSchool	Brian Lipinski	
Tandem	Brian Lipinski	
Backstop Solutions		VP for Investments
Google Sheets		VP for Communications

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