

# EMPOWERING

Future forward, people powered

# Secondary Systems – Monthly Forum

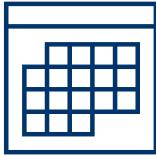
January 28, 2026

# Agenda:

- Welcome & Monthly Forum Goals
- Standing Items
  - Timeline Review
  - Secondary Systems Inventory
- Topics for Today
  - Foundation Data Model Structure
  - Enterprise Data Warehouse

# Goals of the Monthly Forum

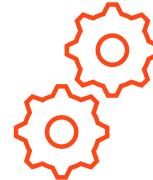
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Stay on top of key dates and milestones

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Know what's needed to keep your system in sync with Workday

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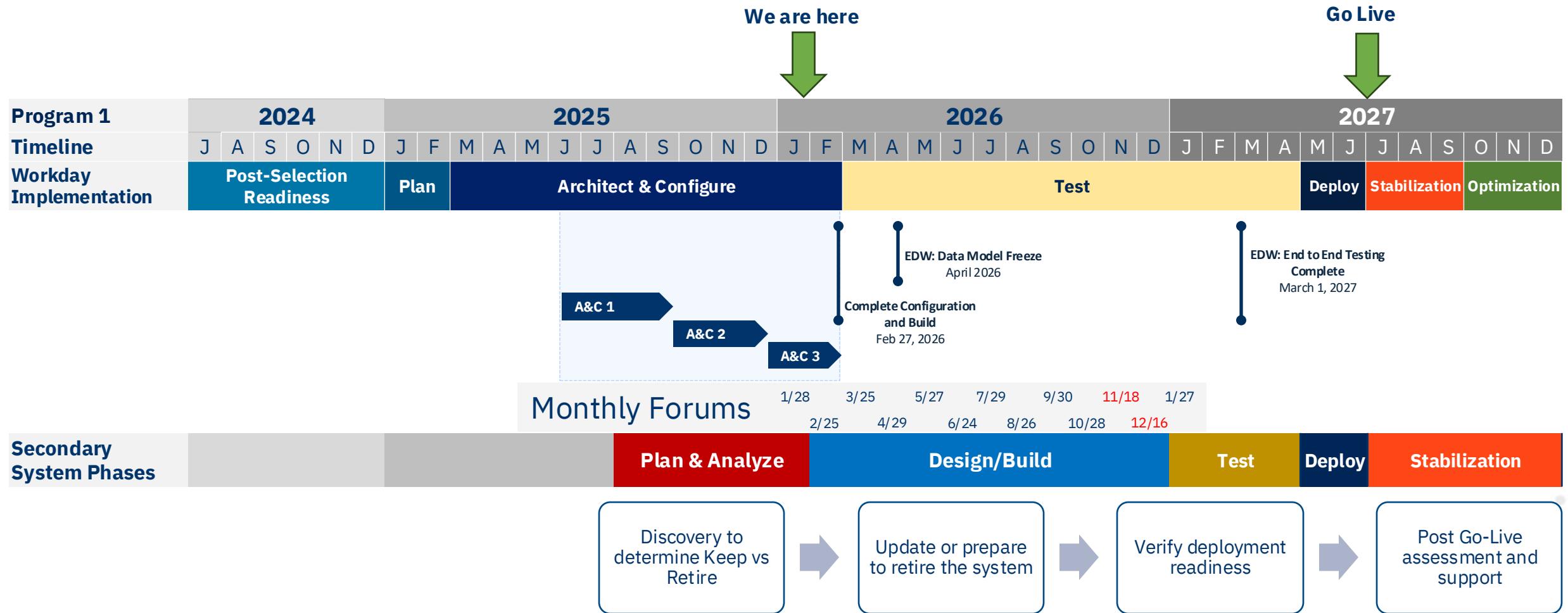


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Connect you to the right people and resources

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# Project Timeline



# Secondary Systems

Meeting Groups	Units	Keep	Retire	Decision Pending	Total
IFAS	CALS, Extension, Research Component Units: 4H, Seed, Cattle, UFLEF	10	10	5	25
UFHealth (non-COM)	College of Dentistry			1	1
	College of Veterinary Medicine		1		1
	College of Public Health and Health Professions		1	2	3
	College of Pharmacy		1	1	2
Colleges 1	College of Journalism and Communications		1		1
	College of the Arts	1	1	3	5
Colleges 2	College of Liberal Arts and Sciences	1	1		2
	Warrington College of Business	1	4	1	6
UFR, Scripps, UFRF	Scripps Biomedical Research	1		1	2
	UF Research	1		1	2
Business Affairs / CFRE	BATS, Facility Services, EH&S	2	3	7	25
Student Life	Rec Sports, Housing, Student Government	12		1	13
UF Health (COM, clinics)	College of Medicine (GNV, Jax), Health Affairs, Student Health	10	4	8	22
	Florida Museum of Natural History	3			3
Museums & Univ. Press	Harn Museum of Art			1	1
	Phillips Center	2			2
	University Press				0
UFIC	UF International Center			1	1
Foundation & Component Units	UF Development Corporation		2	2	4
	UF Foundation, Inc. (includes Alumni Association)	2		1	3
	UF Historic St. Augustine			1	1
Libraries	University Libraries			1	1
	<b>Total</b>	<b>46</b>	<b>29</b>	<b>38</b>	<b>113</b>

(Original: 157)

As of 1/28/2026

## Round 1 Discovery by Nov 21:

Oct 28+30: IFAS

Nov 4: COTA, CJC

Nov 5: Dentistry, Vet Med, PHHP, Pharmacy

Nov 10: Business Affairs

Nov 12: UFR, Scripps

Nov 19: CLAS, WCBA

## Round 2 Discovery by Jan 23:

Jan 6: UFICO

Jan 7: Libraries

Jan 14: COM + clinics

Jan 15: Museums + Univ Press

Jan 15: UFF + UF Development Corp.

Jan 20: Student Life

## Upcoming Discovery:

Feb 9: UF International Center

Feb 9: UF Historic St. Augustine

TBD: Harn Museum of Art

# Foundation Data Model (FDM)

## *Overview for Secondary Systems Monthly Forum*

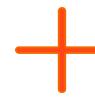
*Sean Simmons, Senior Team Lead, Finance*

*January 2026*

# FDM Overview

The Workday Foundation Data Model (FDM) is the design of the data model used across HCM, Payroll, and Financials that establishes the foundation for Workday transaction processing and reporting.

## Foundational Data Elements (Examples, Not Exhaustive)

Workday Financials	Workday HCM	Workday Payroll
 Company  Fund  Cost Center  Program   Grant  Gift  Project  Location   Custom Organizations  Ledger Account  Spend Category  Revenue Category	 Company  Supervisory Organization  Location  Job Catalog   Staffing Models  Employee Self Service  Compensation Plans  Academic Units   Custom Organizations	 Company  Pay Group  Run Category  Period Schedule   Location  Pay Component  Custom Organizations
Security Groups & Assignments		

 Cross-Functional

# Importance of the FDM

The Foundation Data Model (FDM) provides the foundation for three key functions in Workday: Reporting, Security and Business Processes.

## Reporting

- Real-time, actionable, drillable
- Filter and analyze data using financial and non-financial dimensions
- Ability to trigger notifications and/or alerts
- Standardized financial, operational, and management reporting

## Security

- Which transactions can I initiate?
- Which transactions can I review or approve?
- Who approves my transactions?
- What transactions can I see?
- For which organizations can I see transactions?



## Business Processes

- Accounting Journals
- Job Requisitions
- Change/Add Job
- Supplier Invoices
- Payroll Payments
- Settlement
- Position Budgets

# Finance FDM Worktag Summary

FDM Worktags

What is the “color of money”?

*Funding Source*

Gift

Grant

Designated

Fund

Who owns or is responsible for the financial activity?

*Unit*

Company

Business Unit

Cost Center

Assignee

Region

How are the funds being used?

*Activity*

Project

Activity

Program

Appropriation

Initiative

What is the accounting classification of the transaction?

*Classification*

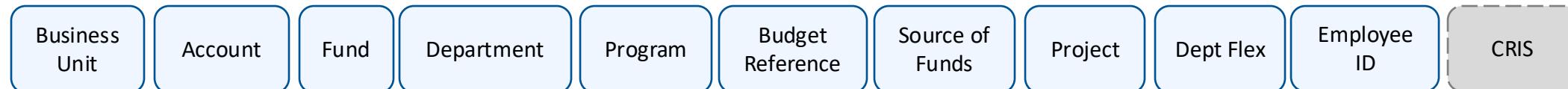
Spend Category

Revenue Category

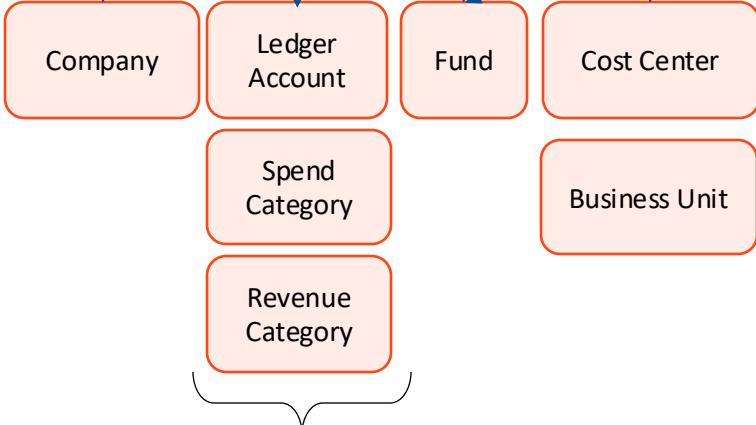
Ledger Account

# Draft Current to Future State Translation

PeopleSoft



Workday



\*See Note 2

## Notes

1. Order of worktags on transactions has yet to be determined.
2. Typically, only one worktag in each column will be entered by an end-user on an operational transaction.
3. CRIS (current-state) includes IFAS-specific values and work to define how they will map in future state is in progress.
4. Translation visual excludes current state dimensions from entities not on UF PeopleSoft.
5. Initiative Custom Organization is a new data concept introduced in the future state. There are no equivalent values or direct mappings from the current state, as this concept did not previously exist in the legacy data model.

# Finance FDM Worktag Definitions

## Worktags that identify who owns or is responsible for the financial activity

<b>Required</b>	
<b>Company</b>	Company represents unique business entities within an enterprise, which are usually separate legal entities. Company is considered the level at which one holds a balanced set of books. All transactions must have a Company ("required"). <b>Format: 5 characters - UFLOR</b>
<b>Optional</b>	
<b>Business Unit</b>	Business Unit is for a limited subset of organizations that have specific balance sheet reporting requirements, such as account receivable or deferred revenue. Use of Business Unit is optional and generally only applicable to certain units. <b>Format: 5 characters – BU123</b>
<b>Required</b>	
<b>Cost Center</b>	Cost Centers are units used to hold revenues and expenses, have budgets and clearly defined responsible person(s), and whose activities are intended to be on-going or recurring. All transactions must have a Cost Center ("required"). <b>Format: 8 characters – CC123456</b>
<b>Optional</b>	
<b>Assignee</b>	Assignee allows for tracking by individual and for identifying and reporting on financial activity and balances for which the individual has been granted spending authority (e.g., faculty, staff). Use of Assignee is optional. <b>Format: 8 characters – 12345678</b>
<b>Optional</b>	
<b>Region</b>	Region is intended for larger campus organizations that need to track the general area where a financial transaction occurs, such as a campus, clinic, county or hospital. Use of Region is optional. <b>Format: 6 characters – RG1234</b>

# Finance FDM Worktag Definitions

## Worktags that identify the “color of money”

<b>Required</b>	
<b>Fund</b>	Fund represents high-level source of funds to support GASB reporting categories and other internal and external reporting requirements. Fund is automatically defaulted based on the value for Grant, Gift or Designated. All transactions must have a Fund (“required”).
	<b>Format: 5 characters – FD123</b>
<b>Conditional</b>	
<b>Grant</b>	Grant refers to a Sponsored Program, which is an exchange transaction with a specified statement of work between UF and a private or governmental entity as the sponsor. It is required on transactions related only to Grants (“conditional”).
	<b>Format: 8 characters – GR123456</b>
<b>Conditional</b>	
<b>Gift</b>	A donor fund established for a distinct charitable purpose by an individual donor, entity, or group of donors. It is required on transactions related only to Gifts (“conditional”).
	<b>Format: 8 characters – GF123456</b>
<b>Conditional</b>	
<b>Designated</b>	Designated is used to track funding source types other than Gift or Grant, and which necessitate a level of granularity below the fund level to meet institutional financial reporting requirements. It is required on all transactions that are NOT related to Grants or Gifts (“conditional”).
	<b>Format: 8 characters – DN123456</b>

# Finance FDM Worktag Definitions

## Worktags that identify how the funds are being used

<b>Conditional</b> <b>Program</b>	Program is used to categorize activities by mission or function; it supports NACUBO and mandatory reporting of functional expense classifications. Use of Program is required only on revenue and expense transactions (“conditional”).	<b>Format: 5 characters – PG123</b>
<b>Optional</b> <b>Project</b>	An activity with a specified purpose that has a defined start and end date (such as a capital or IT project), OR other trackable activities that could have multiple funding sources. Use of Project is optional.	<b>Format: 8 characters – PJ123456</b>
<b>Optional</b> <b>Activity</b>	Activities are used to provide flexibility to colleges and departments to classify department-specific revenue or expenses that are not already tracked using other FDM dimensions, usually to meet departmental internal reporting requirements. Use of Activity is optional.	<b>Format: 8 characters – AC123456</b>
<b>Conditional</b> <b>Appropriation</b>	Appropriation represents carryforward funds authorized by the state for use by UF in alignment with the approved Carryforward Spend Plan. Use of Appropriation is only applicable to transactions associated with Carry Forward Spend Plan funding (“conditional”).	<b>Format: 6 characters – AP1234</b>
<b>Conditional</b> <b>Initiative</b>	The Initiative worktag represents a new data collection concept which specifically captures strategic initiatives defined by the President/Provost and/or a College Dean (“conditional”).	<b>Format: 8 characters – IN123456</b>

# Finance FDM Worktag Definitions

## Worktags that identify the accounting classification for the transaction

### Required

#### Ledger Account

An account or record used to sort and store balance sheet and income statement transactions. Ledger Account Summaries (e.g., Tuition and Fee Revenue) are used to create financial statement lines primarily for statutory external reporting. Ledger Account is often automatically defaulted based on the value entered for Spend Category or Revenue Category.

**Format: 5 characters – 10101**

### Conditional

#### Spend Category

Provides a lower level of detail from the Ledger Account needed for operational reporting. It is used to identify and categorize the different types of expenditures reported within Workday. It is only required on spend (expense) transactions (“conditional”).

**Format: 6 characters – SC7001**

### Conditional

#### Revenue Category

Provides a lower level of detail from the Ledger Account needed for operational reporting. Revenue categories are required for Customer and Sponsor Invoices. It is used to identify and categorize the different types of revenues reported within Workday. It is required only on revenue transactions (“conditional”).

**Format: 6 characters – RC5001**

# Future Topic: Driver and Defaulted Worktags

## Driver & Defaulted Worktags

### Driver Worktag

Worktags that drive (default) the value of other worktags.

Example:

**Gift, Grant, Designated** will drive (default) the value for Fund

### Default Worktag

Worktags that are defaulted from other worktags.

Example:

**Fund** is defaulted by **Gift, Grant, Designated**

#MTC

# Enterprise Data Warehouse (EDW)

## *Update for Secondary Systems Monthly Forum*

*Ben Markus, Program Manager, EDW*

*January 2026*

# The Empowering UF Enterprise Data Warehouse: Context and Purpose

**This program, and its underlying technology's, primary purposes:**

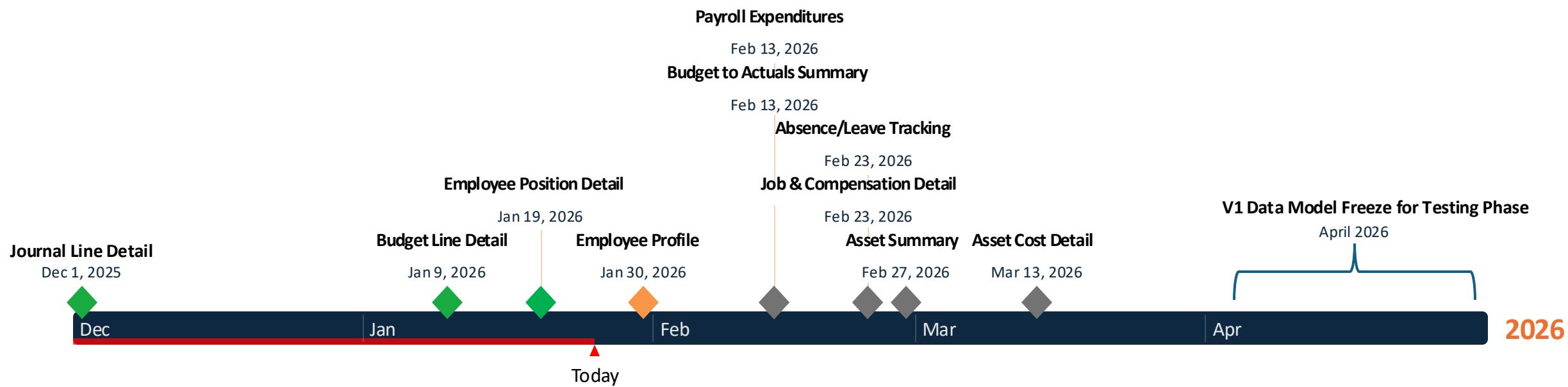
- Enable scalable, governed reporting beyond Workday
- Deliver foundational data models aligned to prioritized Workday modules
- Single source of truth through standardized core data models
  - Goal is to have all downstream systems sourcing from the same data model(s)
- Align with enterprise reporting strategy
- Implement Workday data governance and data access recertification

# **The Empowering UF Enterprise Data Warehouse: Current Work, i.e., What's Happening Now?**

- Designing, developing and testing foundational data models aligned to prioritized Workday modules [Timeline on next slide]
- Identifying and enabling EDW reporting for key FI and HCM data sets
- Readying EDW infrastructure for data ingestion, and project-phase testing activities
- Empowering team members gathering and submitting User Stories to address business reporting and data needs.

# Empowering UF Enterprise Data Warehouse Data Model Build Timeline (as of Jan 23, 2026)

- ◆ Design and Development Complete
- ◆ Design or Development In Progress
- ◆ Design or Development Not Yet Started



# Upcoming Forum Topics

Jim Harrison, Lead, Secondary Systems

## February: Customer Accounts

- Additional data objects beyond FDM, customer accounts example
- Enterprise Interface Builder (EIB) template upload demo for Accounts Receivable

## Additional Forum Topics

- Tips for coordinating with third party vendors
- Additional data objects beyond FDM: send your list
- Supervisory Organizations
- Data Access Request Forms & Process
- Test Phase Timeline and Critical Dates

Email questions to Jim Harrison:

[empowering@ufl.edu](mailto:empowering@ufl.edu)

# Additional Resources

Jim Harrison, Lead, Secondary Systems

## [empowering.ufl.edu](#)

- *Timeline > Transition plan (List of enterprise systems)*
- *Education Center*
- *Outreach > Secondary Systems*

## [data.ufl.edu](#)

- To join the UF data community, visit [data.ufl.edu](#), click **ONELAKE**, then *Onboarding* for instructions
- Monthly Data@UF meeting series
  - Intended for technical users
  - 4<sup>th</sup> Friday of the month
- Data feeds will need Data Trustee approval even if previously approved
  - Submit ticket on [data access request](#) web page ([it.ufl.edu/services/408](#))

**Email questions to Jim Harrison:**

[empowering@ufl.edu](mailto:empowering@ufl.edu)

# Questions and Discussion

We want to hear from you!



**Email Us**  
*empowering@ufl.edu*



**Visit Our Website**  
*empowering.ufl.edu*

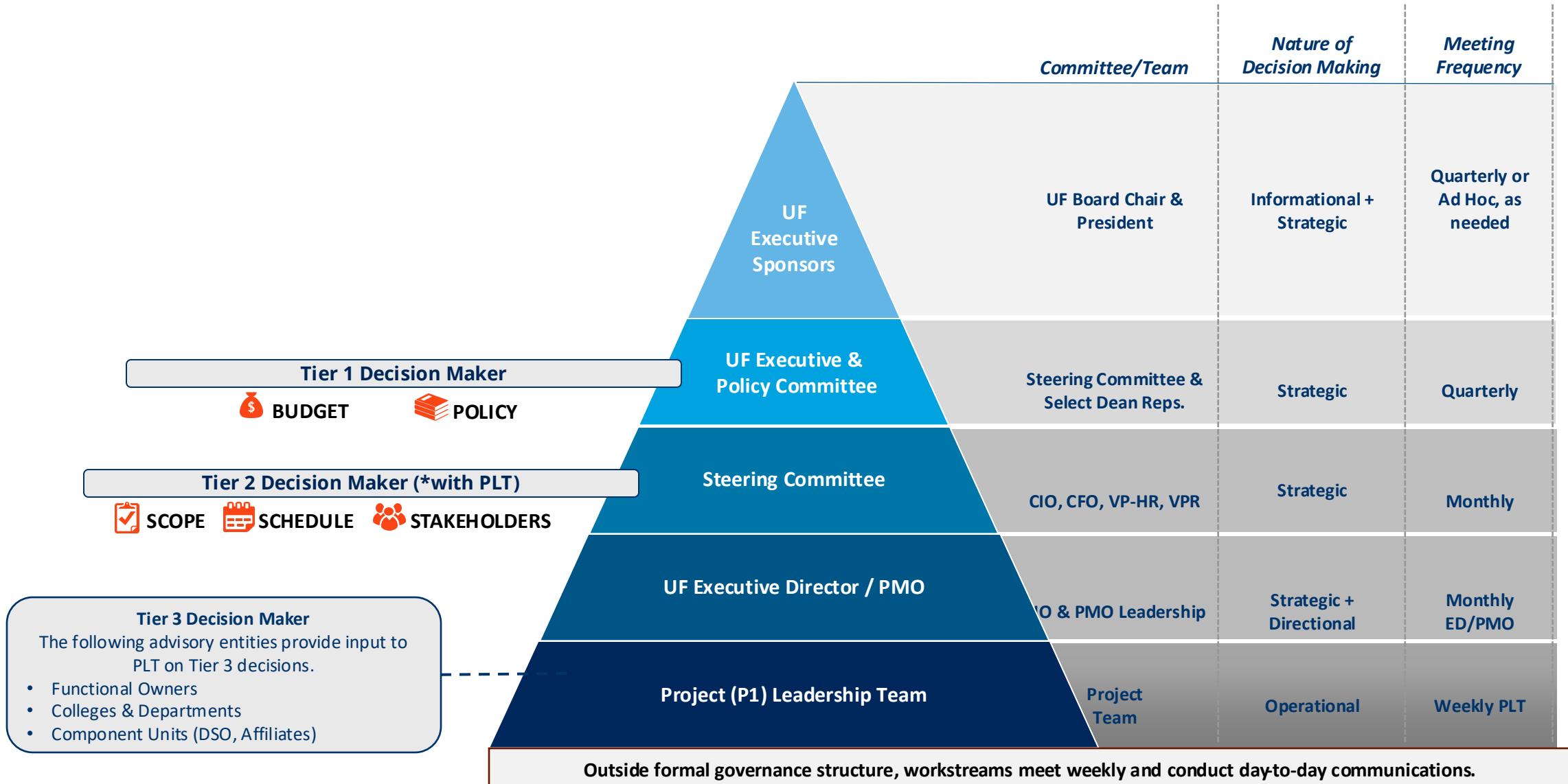


**Share Your Feedback**  
*Suggestions and questions*

**EMPOWERING**   
Future forward, people powered

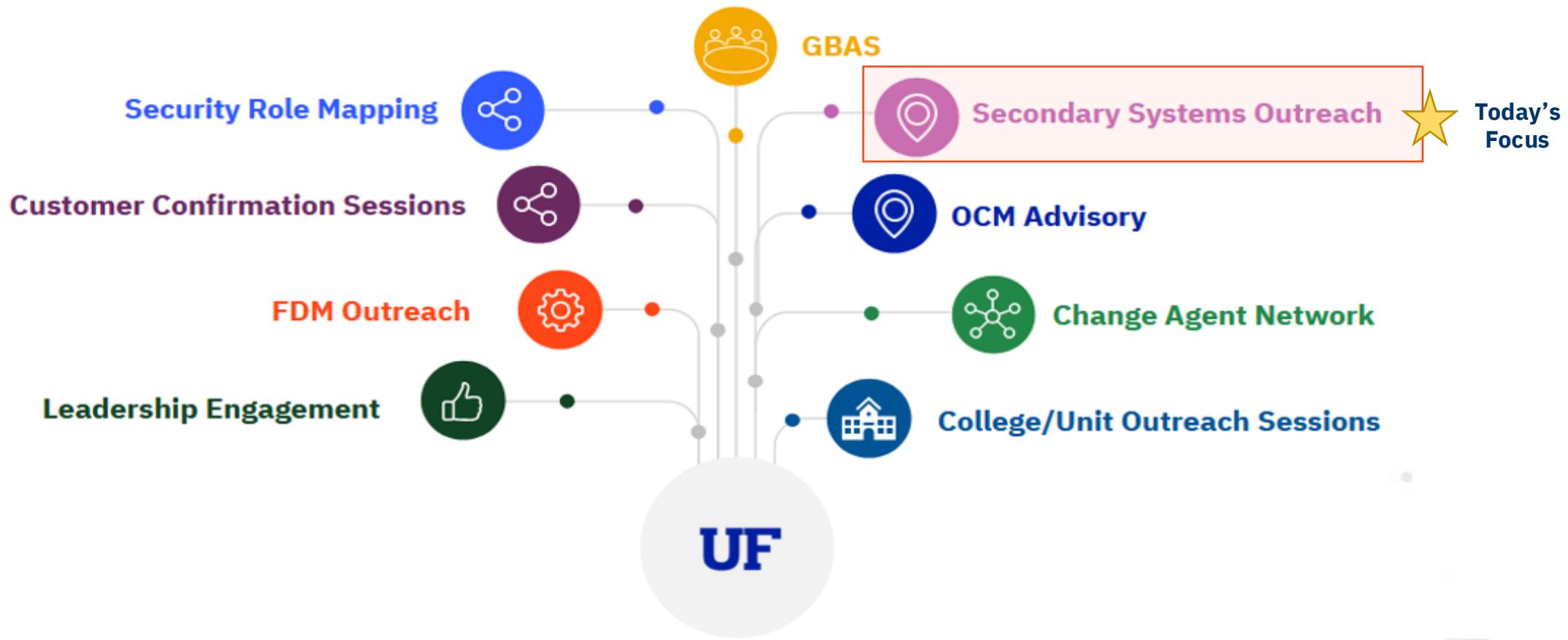
# Appendix

# Empowering UF Decision-Making Governance



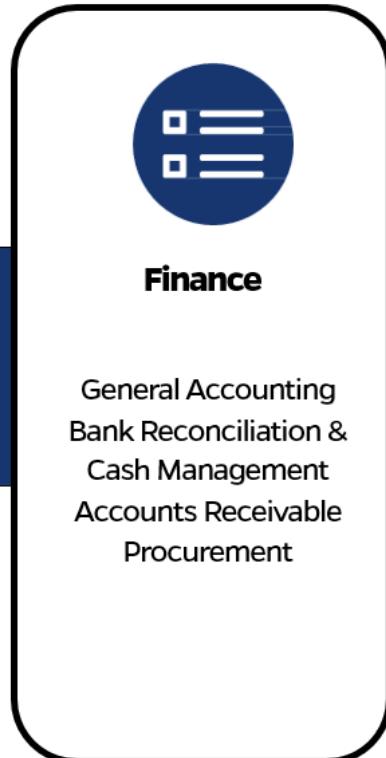
# Empowering UF Engagement Activities

We are engaging stakeholders at all levels through multiple forums, sharing initiative updates and gathering feedback to help shape new ways of working.



# Enterprise Resource Planning Scope

UF's Enterprise Resource Planning (ERP) system provides **critical support to operate** the university. The functionalities listed below are expected to move to Workday in the summer of 2027. The goal is to **streamline the processes and functionality**.



# OneUF Vision and Implementation Scope

## Phase 1: FIN + Post-Award Grants & HCM + Payroll Implementation

University of Florida
16 Colleges
150+ Centers
40+ Institutes
40+ Administrative and Academic Support Units
Institute of Food and Agricultural Sciences (IFAS)



DSO/Affiliates using the UF ERP
Cattle Enhancement Board, Inc. (CATTL)
Citrus Research and Development Foundation, Inc. (FCRDF)
UF Development Corporation (UFLDC)
UF Historic St Augustine, Inc. (STAUG)
Florida Foundation Seed Producers, Inc. (FFSPI)
UF Research Foundation, Inc. (UFRFI)
The UF Leadership & Education Foundation, Inc (UFLEF)
UF Investment Corporation (UFICO)
UF Foundation, Inc. (UFFND) & UF Alumni Association, Inc.
4H Club Foundation, Inc.
UF Self-Insurance Program + Healthcare Education Insur. Co.



DSO/Affiliates not using UF or Shands ERP
The University Athletic Association, Inc.
Gator Boosters, Inc.
Faculty Associates, Inc. (Dentistry)
Florida Clinical Practice Association, Inc.
Florida Veterinary Medicine Faculty Association, Inc.
UF College of Pharmacy Faculty Practice Association, Inc.
Faculty Clinic, Inc.
Florida Health Professions Associations, Inc.
UF College of Nursing Faculty Practice

## Phase 2

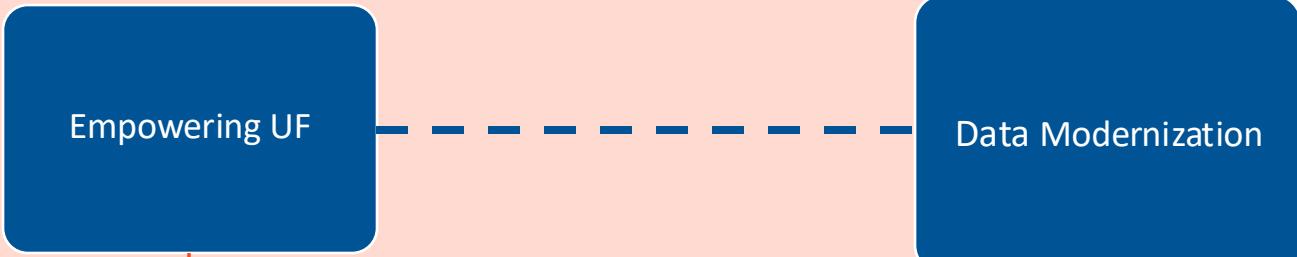
DSO/Affiliates using Shands ERP for FIN
GatorCare Health Management Corporation
UF Jacksonville Physicians, Inc.
Shands Jacksonville HealthCare, Inc.
Shands Teaching Hospital and Clinics, Inc.
TBD

# Empowering UF Portfolio

## Portfolio

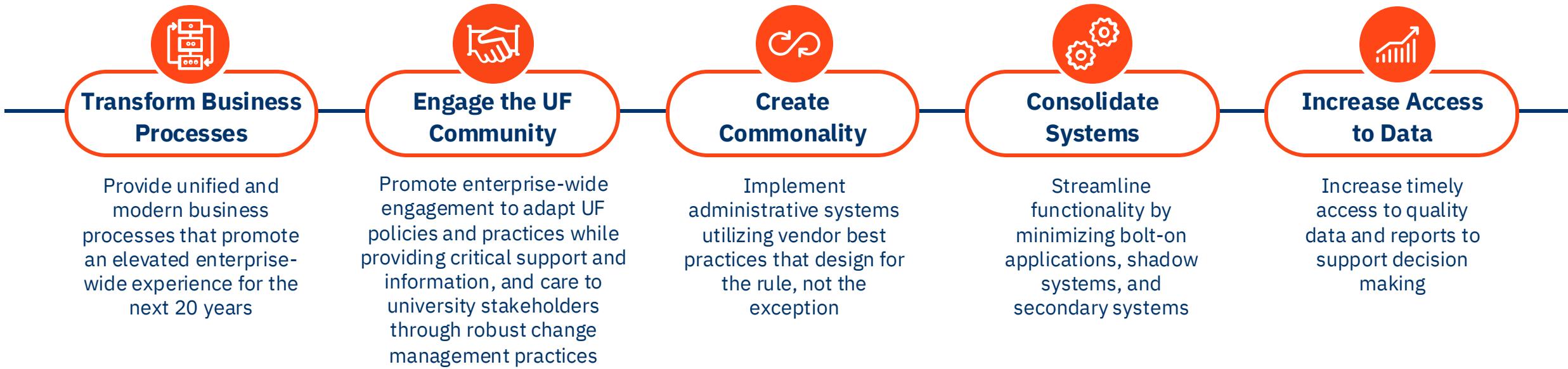
## Programs

## Projects



**NOTE:** Streamlining Academic Systems, or **SAM**, UF's initiative to modernize and integrate UF's academic systems is outside of this initiative.

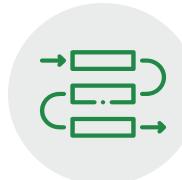
# Empowering UF Guiding Principles



## Project Critical Success Factors Include:



**Change Management**



**Business Process Engineering**



**Reporting & Data**

# Decision-Making North Stars

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