

EMPOWERING

UF

Future forward, people powered



UF Enterprise Resource Planning Overview

UF's Enterprise Resource Planning (ERP) system provides **critical support to operate** the university. A **readiness assessment** has been conducted to understand how UF's business processes and administrative systems may be **modernized to better serve** the institution.



Finance

General Accounting
Bank Reconciliation &
Cash Management
Accounts Receivable
Procurement



Payroll

Earnings & Deductions
Processing
Accounting
Reporting



Human Capital Management

Talent & Performance
Compensation
Benefits
Recruiting
Learning
Time Tracking



Grants Administration

Post-Award
Administration
Monitoring
Data Collection &
Reporting
Closeout



Data & Reporting

Chart of Accounts
Data Governance
Report Delivery
Reporting & Analysis

ERP Project: Our Vision

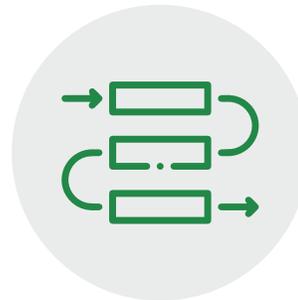
Modern, intelligent, unified business processes and systems that empower the UF community

OneUF

Critical Success Factors



**Change
Management**

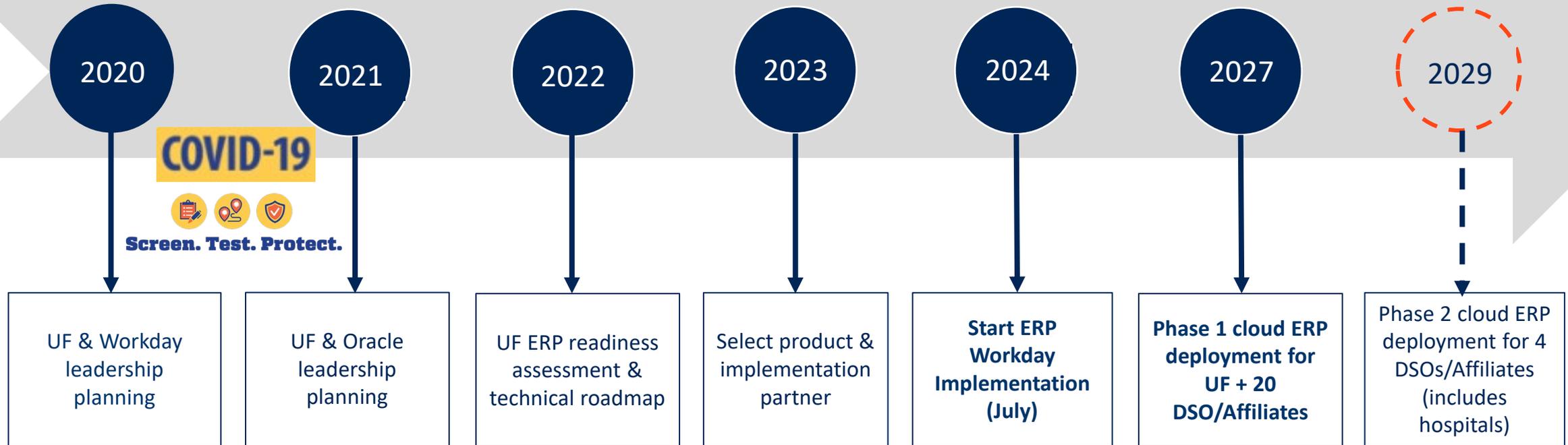


**Business Process
Engineering**



**Reporting
& Data**

Path to Enable the OneUF Vision



The Student Information System (SIS) is not in scope for the Phase 1 or Phase 2 implementation. Modernization to SIS will eventually be required. Additional improvements to the IT Landscape will continue to be explored throughout this effort.

OneUF Vision and Implementation Scope

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

Phase 2

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 for FIN
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.



DSO/Affiliates not using UF or Shands ERP for FIN
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.
UF Self-Insurance Program + Healthcare Education Insur. Co.
Faculty Clinic, Inc.
Florida Health Professions Associations, Inc.
UF College of Nursing Faculty Practice

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.

Peer Benchmark: Public Institutions

Cloud ERP in progress
 Cloud ERP complete

Institution	Finance	Human Resources	Student
Indiana University, Bloomington	Kuali	Kuali	PeopleSoft
Penn State University	SAP	Workday (2017)	PeopleSoft
Texas A&M University	Homegrown legacy	Workday (2018)	Banner
University California, Berkeley	PeopleSoft	Mainframe	PeopleSoft
University California, Los Angeles	Oracle Cloud (2024)	Mainframe	Mainframe
University of Illinois, Champaign-Urbana	Banner	Banner	Banner
University of Michigan, Ann Arbor	PeopleSoft	PeopleSoft	PeopleSoft
University of North Carolina, Chapel Hill	PeopleSoft	PeopleSoft	PeopleSoft
University of Texas, Austin	Homegrown legacy	Workday (2018)	Mainframe
University of Virginia	Workday (2022)	Workday (2019)	PeopleSoft
University of Wisconsin, Madison	Workday (2025)	Workday (2025)	PeopleSoft
The Ohio State University	Workday (2021)	Workday (2021)	PeopleSoft

Organizations Using Workday

Global Clients

Higher Education



Florida Customers

Image and data source: Workday

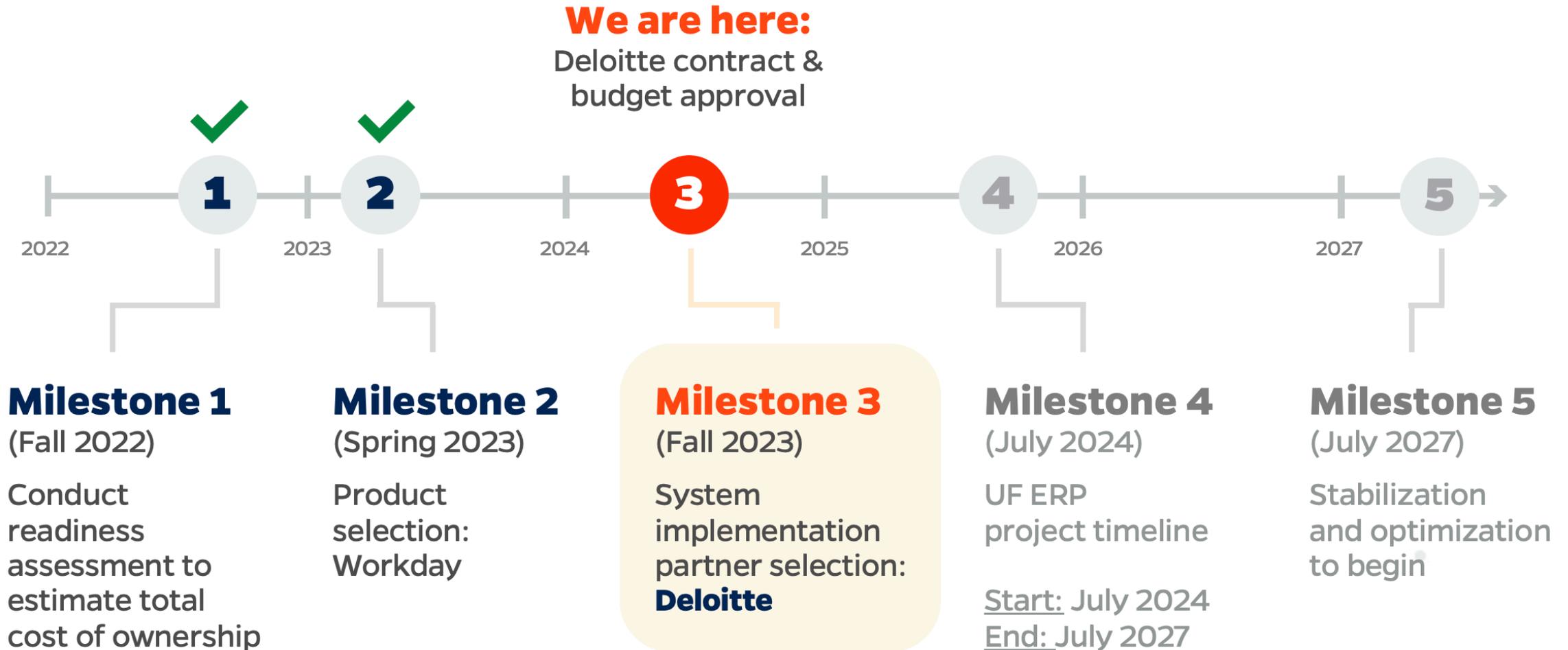
Agility, Adaptability & Insight

Evolving AI-powered technology for improved:

- Integration, analytics & reporting
- Talent acquisition
- Self-service & mobility
- Manager insights
- Accuracy of critical processes
- Safeguards against cybersecurity threats



Empowering UF Timeline



UF Board of Trustees Approved
March 7, 2024

ERP Project Implementation Timeline

Phase 1	2024												2025												2026												2027											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Human Capital Mgt & Payroll	WE ARE HERE						Post-selection Readiness						Plan						Architect						Configure & Prototype						Test						Deploy		Support (Hyper care)									
Finance & Post-Award Grants Mgt							Post-selection Readiness						Plan						Architect						Configure & Prototype						Test						Deploy		Support (Hyper care)									

Already underway:

- **Identity and Access Modernization:** Summer 2024
New security role system to align with Workday
- **Faculty Excellence & Advancement:** Late spring 2025
Faculty evaluation, promotion and tenure system; enhanced collaboration
- **Workday Adaptive Planning:** Summer 2026
Optimizing platform's features for improved visibility, reporting

Your feedback is critical.

UF ERP Project Scope

One UF: Includes UF + affiliates + direct support organizations*

EMPOWERING UF

UF Workday Implementation
Executive Team & Governance Structure



* Potential Phase 2 including Shands ERP system