

Understanding SmartTag Structure in Workday

Researching Cost Center and Fund

For new SmartTag requests

In Workday, we have funds and cost centers similar to how we had funds and org codes in Banner. Cost centers are centered around departments; they are essentially subsets of a department. The Workday replacement for index (SmartTag) is similar to Banner as well.

As you may already be aware, Cost Center hierarchy is the key to the new structure in Workday. It is important for you to understand the hierarchy so that you can manage your department's funds and activities. At the top level, the hundreds of cost centers roll up into the collection of ALL FAU Cost Centers. At the bottom level are the actual cost centers. The levels in between make up the hierarchy, where access, reporting, etc. are controlled.

Level 5 Cost Center Hierarchy is the lowest-level grouping of cost centers in Workday. It is the level at which we are assigning roles for viewing budget to actual reporting and it is intended to organize Cost Centers into Departments. The next level up, Level 4, organizes cost centers by college (for the academic side of FAU). Again, this allows for reporting and role assignments to be done on a hierarchy level for a group of related cost centers.

SmartTag represents a short-cut. Workday's structure allows us to have multiple smarttags within each cost center. This helps simplify the tracking of your funds.

For example, within one cost center *Department of Educational Leadership*; you could have several SmartTags:

1. Department of Educational Leadership (**E&G funded**)
2. CF-Department of Educational Leadership (**Carryforward funds**)
3. Department of Educational Leadership (**Foundation funded**)
4. Educational Leadership Sales (**Auxiliary funded**)

They share a cost center (for tracking activity - revenues/expenditures/personnel) and share a cost center manager, but have different funding sources. Also because organizationally it makes sense that the business purpose of all TAGs are similar to are related to that cost center

As another example, the Department of Educational Leadership cost center could have two E&G-funded SmartTags, one for Boca and one for Jupiter, or both SmartTags can be under the same campus and same program code.

Do I need a New Cost Center?

If you can't track the activity for the new SmartTag under an existing cost center, or if it makes no sense that the business purpose of this new TAG will be similar to or is related to that cost center; then a new cost center will be needed.

If you need a new Cost Center, please follow the instructions below to find Level*5 location that is requested on the ticket.

How to find the location for the New Cost Center?

Cost Centers are set up under the lowest hierarchy, which is level 5. You will need to examine related cost centers to determine the appropriate location for your new Cost Center (and the SmartTag that will be tied to it).

Run **FAU SmartTag Finder Report**, enter your appropriate hierarchy level (e.g. College of Education *4) in the Cost Center Hierarchies prompt line.

FAU_SmartTag Finder

Cost Center Manager on SmartTag

Inactive

☐

Cost Center

Fund

Grant

Business Unit

Fund Hierarchies

Cost Center Hierarchies

✕ College of Education

*4

Level *5 is the level that is needed in order to setup the new Cost Center.

The CC Level *5 is essential information for your new SmartTag request in the OIT ticket system. Following the above steps will help you determine the best structure and hierarchy for your new SmartTag. Remember, access, approvals, and reporting depend on you providing the appropriate *5 hierarchy for the cost center. Reclassifying and moving actual activity after-the-fact is time consuming and tedious, we encourage you to exercise due care in the set-up steps.

← FAU_SmartTag Finder

Inactive No Cost Center Hierarchies College of Education *4

241 items

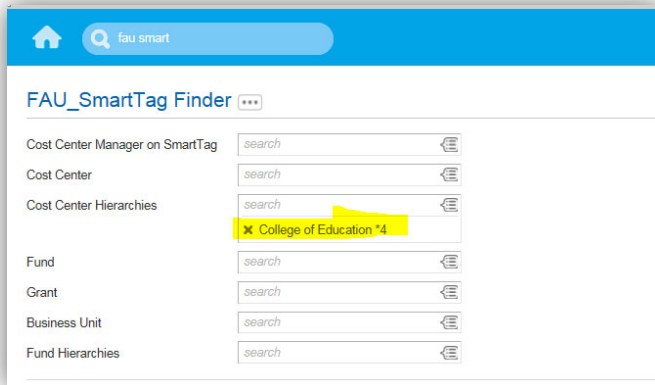
SmartTag	Cost Center	Grant	Program Object	Business Unit	Fund	Cost Center - Level 3	Cost Center - Level 4	Cost Center Level 5	Cost Center Manager	Funding Source (Fund level 2)	Inactive	Departmental Finance Approver (over \$5k)	Grant Manager	Research Accountant
TAG003069 Exercise Science & Health	CC0234 Department of Exercise Science & Health		PG5201 Campus Events & Organized Student Services	BU001 Boca	FAU_F0149 Exercise Science & Health Promtn/ED	Colleges *3	College of Education *4	Department of Exercise Science & Health Promotion *5	Andrew Robeson (200018197)	Agency - FAU *2				
TAG003639 AMI - Funding Pass Through	CC1452 Education - Pass Through Funding		PG6100 General Administration	BU001 Boca	FAU_F0274 AMI - Funding Pass Through	Colleges *3	College of Education *4	Education - Funding Pass Through *5	Andrew Robeson (200018197)	Agency - Student Clubs *2				
TAG003640 MPFI - Funding Pass Through	CC1452 Education - Pass Through Funding		PG6100 General Administration	BU001 Boca	FAU_F0275 MPFI - Funding Pass Through	Colleges *3	College of Education *4	Education - Funding Pass Through *5	Andrew Robeson (200018197)	Agency - Student Clubs *2				
TAG001593 COE - Dean's Account PDT	CC0656 COE - Dean's Account PDT		PG7800 Continuing Education	BU001 Boca	FAU_F0051 Faculty Development & Travel	Colleges *3	College of Education *4	COE - Dean's Office *5	Andrew Robeson (200018197)	Academic Auxiliaries *2				
TAG001739 Curriculum Cult & Educational Inquiry - Faculty Development	CC0230 Curriculum Culture & Educational Inquiry		PG7800 Continuing Education	BU001 Boca	FAU_F0051 Faculty Development & Travel	Colleges *3	College of Education *4	Curriculum, Culture & Educational Inquiry *5	Andrew Robeson (200018197)	Academic Auxiliaries *2				

How to find the location for your SmartTag's Fund:

In addition to the appropriate Cost Center for your new SmartTag, you will need to select the appropriate fund. This is simple for funds such as GTAIDS (FAU_F0000) and Carryforward (FAU_F0019). However, this has been a little more challenging for some of the other fund types, especially Auxiliaries.

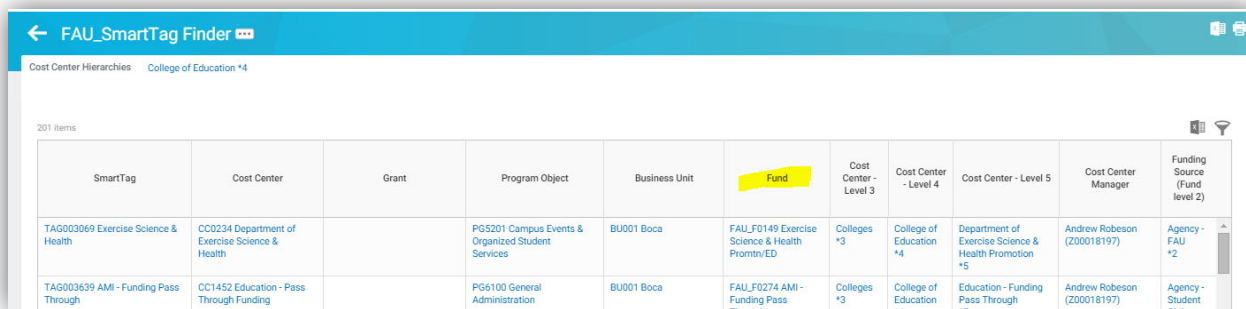
If you know you have existing smarttags that are set up within the same fund that you want to use for your new smarttag, you might find the simplest approach to be looking at your existing smarttags. Run the **FAU SmartTag Finder report**. Enter your College (College of Education *4) or your department (Honors-Social Sciences *5) in the Cost Center Hierarchies prompt line as appropriate. This will show you ALL of the SmartTags under all Cost Centers under that

hierarchy level. You can then scan, or filter, by fund or by cost center, to review your current smarttags and choose one to copy that should use the same fund as your new smarttag.



The image shows the 'FAU_SmartTag Finder' interface. It has a search bar at the top with 'fau smart' entered. Below the search bar, there are several search filters: 'Cost Center Manager on SmartTag', 'Cost Center', 'Cost Center Hierarchies', 'Fund', 'Grant', 'Business Unit', and 'Fund Hierarchies'. Each filter has a search input field and a dropdown arrow. The 'Cost Center Hierarchies' filter is expanded, showing a list of options, with 'College of Education *4' highlighted in yellow.

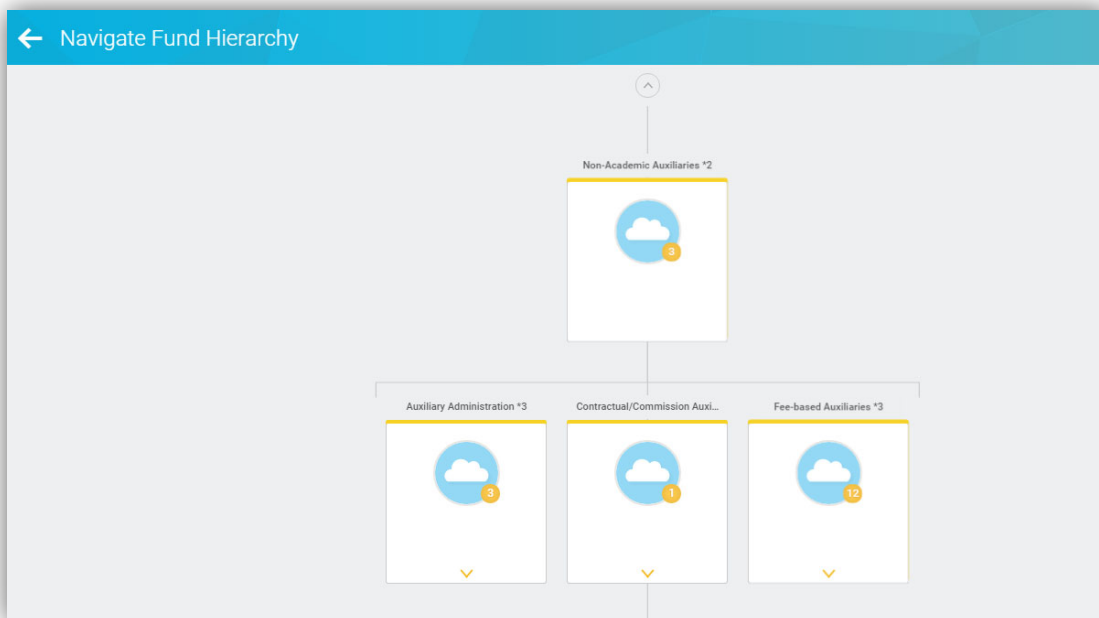
Determine the Fund (code FAU_FXXXX) you want to use for your new SmartTag by using this report.



The image shows a report titled 'FAU_SmartTag Finder' with a sub-header 'Cost Center Hierarchies College of Education *4'. It displays a table with 201 items. The table has columns for SmartTag, Cost Center, Grant, Program Object, Business Unit, Fund, Cost Center - Level 3, Cost Center - Level 4, Cost Center - Level 5, Cost Center Manager, and Funding Source (Fund level 2). The 'Fund' column is highlighted in yellow.

SmartTag	Cost Center	Grant	Program Object	Business Unit	Fund	Cost Center - Level 3	Cost Center - Level 4	Cost Center - Level 5	Cost Center Manager	Funding Source (Fund level 2)
TAG003069 Exercise Science & Health	CC0234 Department of Exercise Science & Health		PG5201 Campus Events & Organized Student Services	BU001 Boca	FAU_F0149 Exercise Science & Health Promtnv/ED	Colleges *3	College of Education *4	Department of Exercise Science & Health Promotion *5	Andrew Robeson (200018197)	Agency - FAU *2
TAG003639 AMI - Funding Pass Through	CC1452 Education - Pass Through Funding		PG6100 General Administration	BU001 Boca	FAU_F0274 AMI - Funding Pass Through	Colleges *3	College of Education *4	Education - Funding Pass Through *5	Andrew Robeson (200018197)	Agency - Student Clubs

If you prefer a more visual approach to the fund hierarchy structure, try the Navigate Fund Hierarchy option.



Just remember

FAU SMART TAG FINDER Report: This report will show you all SmartTags within a Cost Center hierarchy, or you can see all SmartTags using a particular cost center.

Complete Workday Budget Request with care:

As you were reminded above, it is important that your new smarttag be set up properly from inception. Please take time to research each of the worktag elements (Cost Center, Fund, Program, and Business Unit) so that you provide accurate settings for your new smarttags and cost centers.

Also note that it is important to provide the appropriate authority/individual's name for your Cost Centers so that CCManager can be configured properly for approvals, etc.