



# DOCFINITY FOR FINANCE

June 8, 2026



# BEFORE WE BEGIN

- Remember we are all learning and things are changing
  - Questions
    - Not every questions can be answered during this session
    - Questions can be sent anonymously
  - Information accurate as of 6.8.26
- Updated resources are identified
- Recordings will be posted



# HISTORICAL WORKSHOPS

- Workshop tab on the UW – Shared Services, Resource hub
  - <https://www.wisconsin.edu/shared-services/resource-hub/>



# AGENDA

- DocFinity vs EAP/Tableau
- Security
- Searching and viewing historical documents
- Document Details
- Indexing/reindexing documents
- Uploading
- Phase 2
- Next Steps



# DOCFINITY VS EAP/TABLEAU

- DocFinity houses documents
  - Most recent copy from SFS
  - Limited metadata was brought in but not guaranteed
  - No audit table information
- EAP/Tableau houses the data
  - Continues to be built out



# DOCFINITY GROUP SECURITY

- Not tied to Workday security roles
- Granted at a university level, unless enterprise is specifically requested
  - UW Madison and UW Milwaukee can request at division level
- What security do I have?
  - email [GetHelpUW@support.wisconsin.edu](mailto:GetHelpUW@support.wisconsin.edu)
- Request security?
  - email [GetHelpUW@support.wisconsin.edu](mailto:GetHelpUW@support.wisconsin.edu)
  - Request form in the future



# SECURITY ACCESS

- **Viewing** – view only
- **Upload** – view, upload and index
- User – view, upload, index and limited editing
- Admin – view, upload, index, edit, markup and redact (can't delete docs)
- Maintenance – document deletion



QUESTIONS?





# SEARCHING AND VIEWING HISTORICAL DOCUMENTS

- Historical documents
- Many different document types
- Ongoing work to identify and create new document types
- **Searching and Viewing a Document in DocFinity** KB contains a list of documents and related searches



# LEGACY ACCOUNTING JOURNAL ATTACHMENTS

DocFinity WORKSPACES PANELS BUSINESS PROCESSES

Search

Search | ?

Fields marked with an \* are required.

Search : Legacy SFS Accounting Journal Adjustments

Company: Select...

Department ID:

Journal ID:

Status: Select...

Fiscal Year: Select...

\* Username: christie.sleaford

Search Reset to Defaults



# LEGACY DUNNING LETTER

DocFinity WORKSPACES PANELS BUSINESS PROCESSES

Search

Search ?

Fields marked with an \* are required.

Search : Legacy SFS Customer Dunning Letters

Company: Select...

Department ID:

Project ID:

Customer: Select...

Invoice Number:

PO Number:

Dunning ID:

Account ID:

Total Amount:

Invoice Date: MM-DD-YYYY

Letter Date: MM-DD-YYYY

Due Date: MM-DD-YYYY

Print Date: MM-DD-YYYY

\* Username: christie.sleaford

Search Reset to Defaults



# LEGACY PROJECT ATTACHMENTS

**DocFinity** WORKSPACES PANELS BUSINESS PROCESSES

**Search** [Close] [Share] [Refresh]

Search [?] [Menu]

Fields marked with an \* are required.

Search : Legacy SFS Project Attachments ▼

Company: Select... ▼

Department ID:

Project ID:

\* Username: christie.sleaford ▼

**Search** Reset to Defaults



# WISPER ATTACHMENTS

DocFinity WORKSPACES PANELS BUSINESS PROCESSES

Search

Search | ?

Fields marked with an \* are required.

Search : WISPER Document Search

\* Company Ref ID: Select...

WISPER Record ID:

Document Type: Select...

WISPER Award ID:

Award Type: Select...

Contact PI:

Official Proposal Title:

Short Title:

Sponsor (Name):

Sponsor Program Number:

Sponsor Reference Number:

Legacy Department ID:

Department Name:

Search Reset to Defaults



# LEGACY ACCOUNTING ADJUSTMENT ATTACHMENT

DocFinity WORKSPACES PANELS BUSINESS PROCESSES

Search

Search ?

Fields marked with an \* are required.

Search : Legacy SFS Accounting Adjustment Attachments

Company: Select...

Department ID:

Adjustment ID:

Status: Select...

Fiscal Year: Select...

\* Username: christie.sleaford

Search Reset to Defaults



# LEGACY SFS EXPENSE REPORTS

DocFinity WORKSPACES PANELS BUSINESS PROCESSES

Search

Search ?

Fields marked with an \* are required.

Search : Legacy SFS Expense Reports

Company: Select...

Expense Report ID:

Expense Report Date:

Display Options: Select...

\* Username: christie.sleaford

Search Reset to Defaults

Search

Search  

Fields marked with an \* are required.

Search :

\* Company Ref ID:

Cost Center:

Supplier Name:

Supplier ID:

Purchase Order:

Purchase Order Date:  



QUESTIONS?





# DOCUMENT DETAILS

- Metadata that was pulled with the historical documents from SFS
- Audit history
- Versioning
- Notes

DETAILS

Category **Finance**

Document Type **Accounting Adjustment Attachment**

Doc Title **General Ledger**

Company Ref ID **UWPLT**

Adjustment Date **07-17-2019**

Adjustment ID **JVPR131**

Ledger Account

Total Ledger Credits

Total Ledger Debits

Total Amount **\$0.00**

Status **Posted to Ledger(s)**

Fiscal Year **2019**

Period **998**

Description **"131 CASH SWEEP TO 383112"**

Accounting Date **07-01-2019**

Legacy Department ID **383110**

Legacy Ledger Group **ACTUALS**

Legacy Source **INT**

Legacy SFS Unique File ID **002917332019-07-17-11.39.29.726Cash\_Sweep\_FY19.pdf**

Document ID **00000001km6g7fwgy4ame0fv7jw167cd**

File Name **002917332019-07-17-11.39.29.726Cash\_Sweep\_FY19.pdf**

- DOCUMENT HISTORY
- VERSIONS
- FOLDERS





Information - 002917332019-07-17-11.39.29.726Cash\_Sweep\_FY19.pdf

Refresh | Export | View | Revert | Create Pointer | Re-index

Document Details | Notes

DETAILS

DOCUMENT HISTORY

Total Entries: 5

Action	Date ↓	User
View	06-02-2026 8:22 AM	christie.sleaford
View	06-02-2026 8:16 AM	tami.eberle
View	05-11-2026 9:17 AM	whitcome
View	05-11-2026 8:55 AM	whitcome
View	05-11-2026 8:42 AM	whitcome

VERSIONS

FOLDERS

None available

Information - 002917332019-07-17-11.39.29.726Cash\_Sweep\_FY19.pdf

Refresh | Export | View | Revert | Create Pointer | Re-index

Document Details | Notes

DETAILS

DOCUMENT HISTORY

VERSIONS

#	Action	Date ↓	User
0.0	Initial	03-20-2026 3:50 PM	bmulhollem

FOLDERS



Information - 002917332019-07-17-11.39.29.726Cash\_Sweep\_FY19.pdf

Refresh | Export | View | Revert | Create Pointer | Re-index | ?

Document Details **Notes**

[+ Add Note](#)

▼ User ▼ Content ▼ Type

None available

Total Results: 0



QUESTIONS?





# INDEXING/REINDEXING DOCUMENTS

- Indexing is a required step in the upload process
  - More on this once we start uploading documents
- Reindexing is a way to correct errors in the original indexing
  - This is legacy data so use caution when reindexing
  - If reindexing is done DocFinity will be out of sync with prior source system (SFS, WISER, EAP, etc)
- Only delete a document if it should not be in the system at all



**Results**

View View Information View Notes View Pointers Create Pointer Add to Folder Remove Document Start a Process Re-index Email  
Copy Document Links Print Download Replace Edit Cancel edit Export Delete Place on Legal Hold Release from Legal Hold  
Save document Copy Rows Export Results to Spreadsheet Refresh View thumbnails View Details View text

Expense Report Search  Purchase/Change Order/Acknowledgement/Return and Attachments Search

<input type="checkbox"/>	Doc Title	Document ...	Cost Center	Company R...	Purchase O...	Purchase O...	Purchase O...	Status
<input type="checkbox"/>	Document Title Placeh...	Purchase Or...	cc001725	UWSYS	03-11-2026	po123	Standard	Approved
<input type="checkbox"/>	Document Title Placeh...	Purchase Or...	987	UWSYS	03-02-2026	PO456	Standard	Closed
<input type="checkbox"/>	Document Title Placeh...	Purchase Or...	123	UWSYS	03-02-2026	po123	Standard	Approved
<input type="checkbox"/>	Document Title Placeh...	Purchase Or...	654123	UWSYS	03-02-2026	987654	Standard	Approved
<input type="checkbox"/>	Document Title Placeh...	Purchase Or...	123	UWSYS	03-18-2026	123	Standard	Approved
<input type="checkbox"/>	Document Title Placeh...	Purchase Or...	123	UWSYS	03-18-2026	123	ShopUW Ca...	Approved
<input type="checkbox"/>	Document Title Placeh...	Purchase Or...	123 123	UWSYS	03-18-2026	123	Standard	Approved
<input type="checkbox"/>	Document Title Placeh...	Purchase Or...	Facilities	UWSYS	02-18-2026	PO-00119069	ShopUW Ca...	Issued
<input checked="" type="checkbox"/>	Document Title Placeh...	Purchase Or...	TestPO325	UWSYS	03-25-2026	TestPO	Inventory R...	Approved
<input type="checkbox"/>	Supply Chain	Purchase Or...		UWSYS		0000000755		

1 2 100 items/page 1 - 100 of many



### Re-index

Edit and then save metadata values for this document. Fields marked with an \* are required.

\* Category: Finance

\* Document Type: Purchase Order

\* Doc Title: Document Title Placeholder

\* Company Ref ID: UWSYS

\* Cost Center: TestPO325

+ Add Remove

\* Purchase Order Date: 03-25-2026

\* Purchase Order: TestPO

+ Add Remove

\* Purchase Order Type: Inventory Replenishment

\* Status: Approved

\* Total Amount: \$325.00

\* Supplier ID: TestPO

+ Add Remove

\* Supplier Name: TestPO

+ Add Remove

\* Fiscal Year: 2026

Buyer:

+ Add Remove

Completed On: MM-DD-YYYY

Description:

\* Cost Center (Security Filter): TestPO325

Legacy Department ID:

Legacy Account:



QUESTIONS?





# UPLOADING

- Users with security can start to upload documents
  - Still working on document types
  - Research workgroup has expanded and started to work through document types
- **Managing Documents in DocFinity** KB contains more information on the steps



## PHASE 2

- Workday documents to DocFinity
  - Being reviewed as part of phase 2
- Workday integrations



# NEXT STEPS

- Go into DocFinity and start to look around and get comfortable
  - Review documents in SFS and WISER and confirm that you can find them in DocFinity
- Export profile
- We are evaluating need for more formal training
- Send feedback, questions or interest in joining the workgroups
  - [GetHelpUW@support.wisconsin.edu](mailto:GetHelpUW@support.wisconsin.edu)



QUESTIONS?





# RESOURCES

KB 160301 – [Searching and Viewing a Document in DocFinity](#)

KB 161432 – [Exporting Document to Export Profiles in DocFinity](#)

KB 160180 - [Exporting Data Only Documents in DocFinity to a Spreadsheet](#)

KB 160239 – [Managing a Document in DocFinity](#)



THANK YOU