



2024R2 Update


# Workday Feature Release Highlights

Armanino's Top Picks of New Features





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## Armanino + Workday

### ABOUT ARMANINO

From strategy and implementation to post-production support, we cater to our clients' needs at every stage of their Workday journey. As a Workday Services partner, we offer extensive industry and finance expertise to guide your plans from conception to deployment and continuous optimization. Together, we can select and implement the scalable Workday solution that aligns with your unique requirements.

As recipients of various Workday top partner awards, including previous Partner of the Year and Partner of the Region: Americas awards, we deeply understand the challenges faced by CFO organizations on a daily basis. These challenges include financial planning, analysis, data consolidation, analytics, reporting, internal controls, data security, and more.

### ABOUT THIS NEWSLETTER

The 2024R2 release of Workday introduces numerous new features. Given that Armanino conducts its operations on the Workday Platform, we possess a comprehensive understanding of the features we anticipate will make the most significant impact on our clients.

Armanino is dedicated to ensuring that Workday clients and end-users receive the support and resources necessary to fully leverage the platform.

In the following pages you'll find our favorite features and functions from the latest release for your review. If you have any questions or would like to explore expanding your Workday platform to better suit your needs or future growth, please don't hesitate to contact us at [experts@armanino.com](mailto:experts@armanino.com).






# Workday's Safe Harbor Statement

This presentation may contain forward-looking statements for which there are risks, uncertainties, and assumptions. If the risks materialize or assumptions prove incorrect, Workday's business results and directions could differ materially from results implied by the forward-looking statements. Forward-looking statements include any statements regarding strategies or plans for future operations; any statements concerning new features, enhancements or upgrades to our existing applications or plans for future applications; and any statements of belief. Further information on risks that could affect Workday's results is included in our filings with the Securities and Exchange Commission which are available on the Workday investor relations webpage: [www.workday.com/company/investor\\_relations.php](http://www.workday.com/company/investor_relations.php)

Workday assumes no obligation for and does not intend to update any forward-looking statements. Any unreleased services, features, functionality or enhancements referenced in any Workday document, roadmap, blog, our website, press release or public statement that are not currently available are subject to change at Workday's discretion and may not be delivered as planned or at all.

Customers who purchase Workday, Inc. services should make their purchase decisions upon services, features, and functions that are currently available.





# **Workday Human Capital Release Notes**



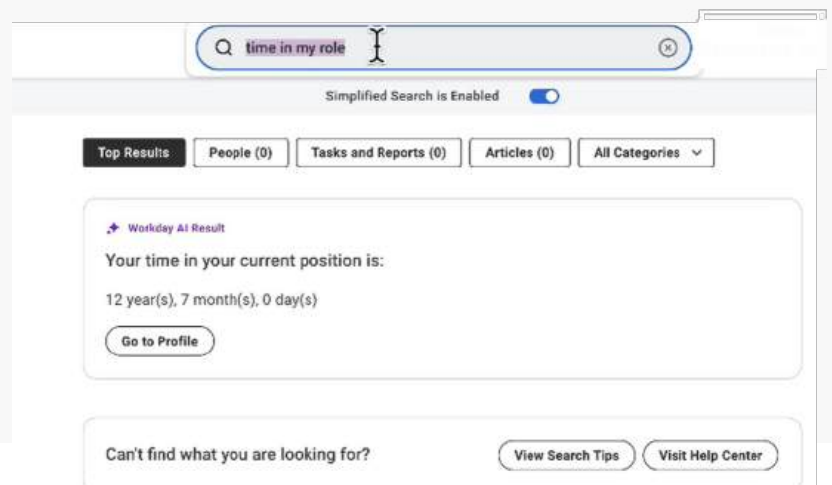
## HCM: Workday Assistant Moving to Search and AI enhanced Search

Workday assistant capabilities moving to into Search, and search for tasks and reports more quickly be integration AI into the search user experience.

- Enables you to access the same quick actions from within Search results that you can in Workday Assistant, saving you time.
- Improve Search results by integrating Assistant's natural language processing, making it easier to find what you need.
- Prevent the floating Assistant button from blocking important information on screen.
- Provide a single place to find things in Workday, unifying the user experience.

### Notes:

- ✓ Automatically available





## Benefits: Worker Wellbeing Profile and Program Cards

Workday expands the Worker Wellbeing so that you can tag benefit program cards with interests that you have configured. Workers can select the interests from their Wellness Interest Profile to view customized content.

- Worker wellbeing options from opt-in to automatically available (with setup required).
- Enable benefit administrators to add wellness attributes to benefit program cards from the Maintain Benefits Program task.
- New report available: Benefits Wellbeing Interest Aggregated Data.

### Notes:

- ✓ Features requires setup.

### Use Cases:

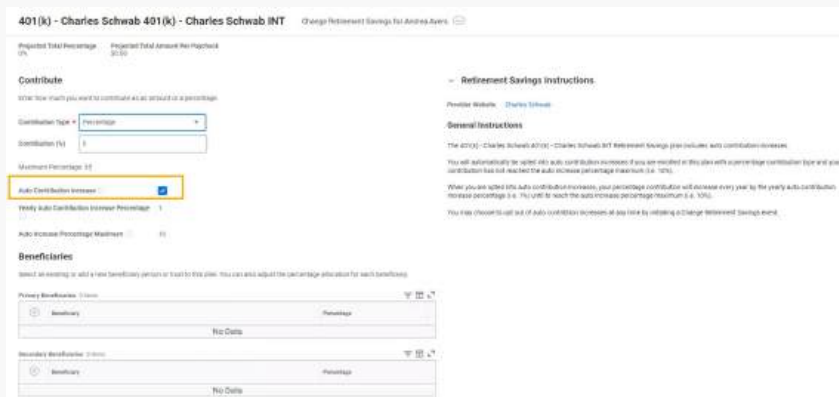
- ✓ Drive insight about which benefit program cards that you've tagged have the most engagement and improve the quality of your employee programs.
- ✓ Improve your Total Rewards Package by prioritizing employee well being.



## Benefits: Auto Contribution Increase for Retirement Savings Plans – Secure Act 2.0

Workday helps US customers to comply with Secure Act 2.0 for automatic contribution increases to employee retirement savings plans.

- You can now enable workers to increase retirement savings contributions for workers that opt in to automatic contribution increases.
- This is only available for percentage contributions.



### Notes:

- ✓ Features requires setup and testing.
- ✓ Change Management should also be considered for employees.

### Use Cases:

- ✓ Helps US customers comply with the Secure 2.0 act.



## Benefits: Benefits Messaging

Workday delivers a new Send Benefits Messages task and an enhanced Send Open Enrollment Reminders task. These tasks leverage notification designer, and enable you to send workers emails, SMS, and push notifications related to their benefits and open enrollment.

The screenshot displays the Workday notification designer interface. On the left, there are two main sections: 'SMS' and 'Email'. The 'SMS' section includes a text area for the message and a note about time-of-day restrictions. The 'Email' section includes fields for 'From' (supern@megafico.com), 'From Display Name', 'Reply To', and 'Subject'. On the right, there is a 'Workers' list with names like Abigail Adams, Angel White, Brigit O'Shaughnessy, Betty Boop, and Betty Brown. Below the list are sections for 'Recipient Count', 'Notification Category' (Benefits Notifications+TG), 'Contact Method' (Email, Mobile Push Notification, SMS), 'Email Branding', and 'Message Template'.

### Notes:

- ✓ Features requires setup.

### Use Cases:

- ✓ Improves experience of creating notifications for admins and increases employee responsiveness.



## HCM: Job Description Generation on Job Requisitions

Workday delivers Job Description Generation on Job Requisitions, enabling you to quickly create job descriptions using generative artificial intelligence.

Workday uses these data points to generate job descriptions:

- Job Posting Title
- Company Name
- Skills

### Notes:

- ✓ Features requires setup.

### Business Benefits:

- ✓ Create efficiencies by quickly generating high quality job descriptions.



## People Experience: Help

Workday allows you to create more robust and engaging content for your audience with enhanced text formatting. Additionally, increased search capabilities due to integrating AI make it easier for users to find the information they need.

- **Additional Text Formatting** – new formatting options like undo, redo, text size, font color etc. Added to help article functions to make it more user friendly.
- **Enhanced Search** – new simplified search toggle will provide more relevant information and will display a Workday assistant summary powered by AI on the search results page.
- **Notification consolidation** - Consolidating and adding new Case Management notification types makes it easier for you to organize your notifications for case owners, case solvers and case collaborators.

### Notes:

- ✓ Features are automatically available.
- ✓ Testing not required, however users may notice changes.

### Use Cases:

- ✓ Enhance OCM and notification experience.

**Workday Human Capital Management**





## People Experience: Help Center in Workday Mobile

With this release, you can now access Help articles in the Help Center when using the Workday mobile application.

- Accessing Help articles and updating The View Case task user interface promotes case deflection by making it easier for employees to find answers to their questions from their mobile devices.
- We add a new Find Answers section to the Help Center on the Workday Mobile application, enabling you to browse and view Help articles from your mobile device.
- View Case task and Help Center user interface on the Workday mobile application to match the user interface on desktop.

### Notes:

- ✓ Features are automatically available
- ✓ Testing not required, however users may notice changes

### Use Cases:

- ✓ Power of Mobile to increase your employee's Workday experience.



## Learning: Enforce Lesson Sequence in a Course

Workday allows you to enforce a lesson order within a course, ensuring that learners complete the required lessons in the designated sequence. This is a checkbox that will force the user to finish the previous content before moving forward in their course.

This will create a stronger foundation of knowledge and deeper understanding before they can complete an assessment or evaluate the content.

### Notes:

- ✓ Checkbox is automatically available to opt in to.

### Use Cases:

- ✓ More structured foundation for learning courses.



## Learning: Virtual Classroom Integration with Zoom

Workday integrates with Zoom to enable you to automatically create Zoom meeting links when scheduling virtual classroom lessons in course offerings.

A new Organizer field enables you to select an organizer for a virtual classroom lesson. The organizer's mailbox associated with the Zoom account will be used to schedule a Zoom meeting, and the organizer will be the host for the virtual classroom lesson.

### Notes:

- ✓ Setup Required

### Use Cases:

- ✓ Greater flexibility for the learning admin in scheduling virtual classroom lessons.



## Payroll: Payroll Results Enhancements

Workday adds new buttons on the payroll results screen that provides access to a new, simplified task to add payroll input and add payroll input task. This layout is more intuitive and will help you complete the task more quickly.

- **Add Payroll Input**
  - Access the new button directly on a worker's payroll result instead of using related actions.
  - Add payroll inputs to results in any status.
- **Add Payroll Input Task**
  - This task displays a simplified version of the Add Payroll Input task, which contains only the most commonly used and necessary fields.

### Notes:

- ✓ Features are automatically available
- ✓ Users will experience a change in the UI, may require updates to Job Aids.

### Use Cases:

- ✓ Quick payroll fixes

## Payroll: Arrears Balances for Employee Self Service

Workday enables workers to view their current arrears balance totals and details through both employee self-service and the Benefits and Pay Hub.

- **New Arrears tab on Worker profile**
- **New Outstanding Arrears Balances table**

The screenshot shows the Workday employee self-service interface. On the left is a navigation sidebar for Lane Smith, Senior Manager, Marketing Communications. The main content area is titled 'Arrears' and displays 'Outstanding Arrears Balances: 3 items'. A table lists the following items:

Deduction	Current Arrears Balance (As of Payment Date)
Dental Insurance A	240.00
Medical Insurance A	1,000.00
<b>Total</b>	<b>1,240.00</b>

### Notes:

- ✓ Setup required to enable feature.
- ✓ Users will experience a change in the UI, may require updates to Job Aids and testing.

### Use Cases:

- ✓ Gives employees better insight into their pay.





## Time Tracking: Enter Time by Period

Workday enables workers and managers to use the period calendar as their primary time entry method. Additionally, includes scheduling data on the calendar and display information such as holiday events and period indicators.

- Primary calendar is renamed from **Classic with Period** to **Classic**.
- Primary calendar option of **Period** is added
- Include Scheduling Data check box is added as well.
- Period calendar view will now include: holidays, incomplete time blocks, and pay date indicators.

### Notes:

- ✓ Setup required to enable feature.
- ✓ Users will experience a change in the UI, may require updates to Job Aids and testing.

### Use Cases:

- ✓ Workers and managers no longer need to switch to the classic calendar view to handle time offs or to view holiday.



## HCM: Display Business Process Step Due Date in User's Time Zone

Workday displays the due date for completing a business process step in the user's local time zone. When you view the business process history you can easily determine if appropriate action was taken on a step and if the step is completed on time.

### Example:

- Betty is based in San Francisco, California and she initiates a business process on 07/14/2024. On the business process definition, a To Do step has a due date of 1 Day which means the due date is 07/15/2024. The To Do step is assigned to Yumiko, and she is located in Tokyo, Japan. Based on the UTC offset, Japan is in UTC+9. On the View Event page, we display the Due Date as 07/16/2024 to Yumiko. If Betty views the event, Workday displays 07/15/2024 as the due date for the To Do step.

### Notes:

- ✓ Feature is automatically available.
- ✓ Improved Business Process Audit Reports.



## Talent Optimization: Feedback Received User Experience in Manager Insights Hub

Enhances the manager feedback received experience in Manager Insights Hub. Workday provides a new user interface to view requested feedback and anytime given feedback by enabling the card format. Workday improves the look and navigation of feedback received.

We increase readability and navigation for managers reviewing feedback received events for their direct reports.

### Notes:

- ✓ This feature is automatically available.
- ✓ Allows employees to more seamlessly enter and exit their performance reviews before submitting.



## Talent Optimization: Career Hub Explore and Career Path Builder Skills and Skill Interests Matching

Workday improves the skills and skill interests matching results in Career Hub Explore and the Career Path Builder. These improvements encourage greater interaction with Career Hub, and enable your workers to identify and pursue relevant career opportunities.

Updates include:

- Featured Next Move and Explore Other Moves sections in Career Hub Explore.
- Career Path Builder, when users select the Skills or Skill Interests source options.
- Suggested skills in the side panel are sorted with job profile explicit skills first followed by machine learning suggested skills.

### Notes:

- ✓ Features are automatically available.
- ✓ Updates to Job Aids may be necessary.



## Talent Optimization: Flex Teams User Experience

With this release, we modify the Flex Teams report and the flex team member feedback user experiences.

These improvements are expected to make the host or team lead experience more seamless, making it quicker to staff their flex teams.

Updates include:

- Displaying the flex teams as cards.
- Highlighting specific calls to action for flex team hosts
- Surfacing insights on cards for workers who have expressed interest.

### Notes:

- ✓ Features are automatically available.
- ✓ Updates to Job Aids may be necessary.



## Talent Optimization: Goals User Experience Redesign for Mobile

Workday enhances the Goals User Experience Redesign feature by enabling the card framework for mobile. These changes only apply if you've opted in to the Goals User Experience Redesign Changes feature on the Maintain Feature Opt-Ins task.

You can now access the card framework included in the Goals Redesign User Interface feature from your mobile device.

### Notes:

- ✓ Features are automatically available.
- ✓ Updates to Job Aids may be necessary.



## Advanced Compensation: Data Entry Check in Compensation Review

Workday increases the accuracy and reliability of manually entered numeric compensation review data using machine learning collected from historical data to validate the data you enter into editable, numeric fields.

Updates include:

- Utilize the Edit Tenant Setup – HCM task.
- Allows you to use Data Entry Check for select fields.

### Notes:

- ✓ Feature is automatically available to utilize.



## Recruiting: Automatic Stage Routing for Multiple Steps

Workday enables you to toggle automatic stage routing on multiple steps of the sub-processes of the Job Application business process. This allows Recruiters to automatically process more candidates through multiple stages.

BPs where this is available:

- Assess Candidate, Background Check, Employment Agreement, Interview, Offer, Reference Check, Review Candidate, Screen

### Notes:

- ✓ Ability to utilize this feature is automatically available.
- ✓ Saves recruiters time and moves candidates more quickly through the recruitment process.

### Use Cases:

- ✓ Decrease time to hire for candidates by using this feature efficiency.





## Recruiting: Undo Move for Multiple Candidates

With this update, we enable you to undo moving multiple candidates forward, returning them to the previous stage of the job application process.

This reduces manual effort in correcting accidental moves for multiple candidate applications.

We deliver a new Mass Undo Move Job Application task (secured to the Undo Move Candidate domain) that you can use to return multiple candidates to their previous stage and step of the Job Application business process.

You can access this task using with the new Undo Move action in the candidate list grid.

### Notes:

- ✓ Feature is automatically available.



## Recruiting: Copy Job Application to Another Job Requisition

Workday now enables you to copy job applications to and from evergreen requisitions, expanding the functionality to support both types of job requisitions and improving your ability manage candidate applications. We also enable you to copy job applications from a candidate profile or job application using the related actions menu, making the process more efficient.

Updates include:

- We update the Copy to Another Job Requisition task to enable you to copy a job application to and from an evergreen requisition.
- We also now display the Copy to Another Job Requisition action from the Candidate Job Applications grid for an evergreen requisition.
- You can now copy a job application to another job requisition directly from a candidate's profile or a job application by selecting Job Application > Copy Job Application from the related actions menu.

### Notes:

- ✓ Feature is automatically available.



## Talent Optimization: Suggested Skills for Workers

Workday improves its methodology for generating skill suggestions to workers by leveraging explicit skill data to supplement existing machine learning-generated skill suggestions.

This can:

- Increase the quantity and quality of skills on worker profiles, facilitating better career insight and mobility.
- Reduce friction and increase user confidence with Skills Cloud.
- After workers add all the explicit skills from these sources, Skills Cloud resumes its normal methodology of using machine learning to suggest additional implicit skills. Skills Cloud always displays 10 skill suggestions.

### Notes:

- ✓ Features are automatically available.
- ✓ Updates to Job Aids may be necessary.



# **Workday Financial Management Release Notes**



## Advanced Close and Consolidation

### **Close and Consolidation Hub:**

- We deliver a new Close and Consolidation Hub that enables you to complete and view close and consolidation tasks and reports from a centralized location. The hub also provides an overview of your close and consolidation data.

### **Manual Intercompany Matching:**

- Workday enables you to manually match intercompany journal lines so that you can identify the unmatched differences when reviewing the intercompany reconciliation report.
- You can now match and unmatch intercompany journal lines across 2 or more companies based on the intercompany elimination rules, enabling you to focus on the unmatched differences when reconciling intercompany journal lines.
- Intercompany Matching differs from the existing Transaction Matching feature which matches journal lines within the same company and ledger account.

## Advanced Close and Consolidation

### **Noncontrolling Interest for All Owned Companies:**

- You can now configure Workday to calculate noncontrolling interest (NCI) for all companies owned by a consolidating parent company, instead of just the companies within the selected hierarchy. You can also now report on NCI in OfficeConnect and Workday Adaptive Planning.
- You can:
  - Save time and effort at period end as well as year end by running NCI only once for your top-level hierarchy, rather than running NCI for each individual hierarchy.
  - Report on NCI journal lines in any reporting tool.
  - Rerun and cancel NCI more easily, since Workday now determines NCI results individually rather than in groups.

## Analytical Framework

### Calculation Expression Builder for Composite Cells:

- Workday enables you to configure formulas and nested functions in your composite reports by delivering the Expression builder for calculation cells. When you edit or create a calculation cell, you can click Show Functions to view the definition, syntax, and examples for these math functions:
  - Difference
  - Divide
  - Multiply
  - Percent Increase
  - Percent Remaining
  - Sum
- You can nest up to 5 functions



## Banking and Settlement

### **Dynamic Supplier Payment Credit Adjustments:**

- Workday enhances dynamic supplier payment date functionality to enable you to automatically apply supplier invoice credit adjustments to invoice payments during settlement. You can now net pending credit memos against supplier invoices irrespective of their due dates.



## Budgets

### **Revenue Driven Budgets - Floors and Ceilings:**

- We now enable you to define a floor as the amount of revenues to be recorded before the budget spending authority begins increasing. You can also define a ceiling amount as the maximum amount the budget spending authority can increase to from the recorded revenue source.
- This streamlines revenue driven budgetary control requirements when there are floors and ceilings that need to be considered for budget spending authority, reducing the need for manual intervention, which can be prone to errors.



## Common Financial Management

### **Alternate Ledger Currency (ALC) Journal Custom Validations:**

- Workday now supports your custom validations on ALC journals.
  - Note: If you have custom validations on ledger or total ledger debits and credits, you must:
    - Modify the existing validations to cover both alternate and primary ledger currency.
    - Create respective alternate ledger currency related custom validations.



## Customer Accounts

### **Clear Open Accounts Receivable with Customer Payments:**

- Workday now enables you to record customer payments with a payment amount of 0, so that you can quickly match multiple invoices, adjustments, and payments in a single transaction.

### **Customer Contact Types:**

- With this release, you can now configure and add contact types to your customer contacts.

### **Customer Invoice Supply Location Options:**

- To increase compliance with local tax regulations, you can now opt into displaying these new prompts on customer invoices and invoice adjustments:
  - Bill-From Address
  - Ship-From Address

### **Edit Unapplied and On-Account Payments:**

- Workday enables you to update the invoice currency for unapplied and on-account customer payments. You can also update the remit-from customer for unapplied customer payments.
- This eliminates the need to cancel and reissue customer payments, saving you time in payment processing.



## Customer Accounts

### **Remit-To Address Settings on Customer Refunds:**

- Workday now enables you to select the payee remit-to address when creating customer refunds.
- Note: To use this enhancement, you must opt in to the Customer Refunds Optimization feature on the Maintain Feature Opt-Ins report.



## Customer Contracts

### **Project Phases and Tasks for Fixed Fee and Value-Based Customer Contract Line Types:**

- You can add project phases and tasks on fixed fee project and value-based project customer contract lines, enabling you to enter amounts at a more granular level, bill, and recognize revenue for multiple stages of a project, eliminating the need to create multiple projects. This capability already exists for project time and expense contract lines, and is now extended to fixed fee project and value-based project lines.
- In this release, the phase and task granularity is only available when you configure Workday to use hours to calculate the revenue for the percentage of completion.
- Workday provides greater control and efficiencies for project billing by allowing contract lines with different revenue treatments to be mapped at a more granular level.



## Customer Contracts

### **Transfer Project Transactions:**

- With this release we deliver a new Transfer Project Transactions task that enables you to transfer transactions from one project, phase, or task to another, and split transactions.
- You can access the task in 2 ways:
  - Directly access the Transfer Project Transactions task.
  - Access the Transfer Project Transactions task from the Manage Project Billing Transactions task's summary page.
- This capability is helpful if you:
  - Book transactions to a project, but want to move them to another project, phase, or task, or to another task within the same project.
  - Have transactions that are no longer applicable to the contract line type they were booked to, for example fixed fee project contract lines, and want to move them to the correct contract line type.
  - Initially book transactions to a nonbillable or internal project, and want to transfer them to a billable project once contract details are completed.

## Financial Accounting

### **Cash Basis Accounting:**

- Workday enables you to configure and generate cash basis accounting for supplier and customer invoices.
- Workday provides an additional basis of accounting and streamlines how you generate cash basis and modified accrual basis financial statements.

### **Intercompany Balancing Rule for Balancing Worktag:**

- Workday streamlines intercompany accounting generation when cost center is configured as a primary or optional balancing worktag and companies have cost center restrictions. This feature enables you to configure and determine the cost center balancing worktag to use on intercompany journal entries for each company, while continuing to respect cost center restrictions configured for companies

### **Support for Noncontrolling Interest Eliminations:**

- Workday factors in noncontrolling interest (NCI) when performing consolidated reporting for partial ownership companies. Elimination calculations now automatically include NCI eliminations.

## Financial Accounting

### **Tax ID Defaulting for Address Level Tax ID:**

- We update tax ID defaulting on the Create Customer Invoice and Create Supplier Invoice tasks to assign tax IDs to customer invoices, supplier invoices, customer invoice adjustments and supplier invoice adjustments. Assignment is based on the shipping address on the invoice, or the primary address if there is no shipping address. The new defaulting logic prioritizes transaction tax IDs at address level, then country level. Otherwise, we use existing defaulting logic.

### **Third-Party Integration for Withholding Tax:**

- We now enable you to configure third-party tax service integrations using the accounting and reporting framework for withholding tax. This enables you to apply withholding tax to third parties.
- This new functionality helps you to more easily comply with tax regulations.





## Grants Management

### **Bill Sponsors Outside Award Line Dates:**

- With this release, we enable you to review cost reimbursable expenditures that fall outside the dates on award lines and make them billable.
- This feature eliminates the need for workarounds to invoice sponsors for billable expenditures that fall outside award line dates, saving you time and improving auditability.



## Inventory

### **Increased Flexibility for Lot and Serial Controlled Items:**

- We now enable you to configure lot and serial control at the item inventory site level instead of strictly at the purchase item overview level.
- We provide more flexibility for your organization to track lot and serial numbers between locations and at specific points in your supply chain.

### **Inventory Transaction Time zones:**

- You can now change how Workday calculates transaction accounting dates based on the local time of the transaction, instead of Pacific Standard Time.
- We prevent discrepancies in booking transactions to appropriate accounting periods, and mismatches in your financial reporting.



## Procurement

### **Setup: Item Substitutes with Different Base Unit of Measure:**

- With this release we enable you to configure substitute items with a different base unit of measure than the primary purchase item.
- We provide more flexibility for substitute item packaging that may differ from primary item packaging, and enable you to use more items as substitutes.



## Supplier Accounts

### **Commodity Codes on Non-PO Supplier Invoices:**

- Workday enables you to add commodity codes and associate these codes with your non-PO supplier invoices, supplier invoice adjustments, and recurring supplier invoices. This provides you with the ability to set up and track spend information based on the commodity code structure for products and services. It also ensures data integrity, improves search for items based on standard commodity code structures, and simplifies and improves accuracy of spend reporting by product taxonomy.
- Workday matches the commodity code on customer invoices and customer invoice adjustments to the commodity code on supplier invoices and supplier invoice adjustments for direct intercompany transactions.

### **Company Currency Fields For Editing and Reviewing Procurement Documents:**

- Workday now displays total amounts in the company's base currency on procurement documents for change orders, purchase orders, and requisitions.



## Supplier Accounts

### **Hold Reasons for Supplier Invoices and Invoice Adjustments:**

- We enable you to specify a configurable reason code when you place a supplier invoice or supplier invoice adjustment on hold from payment.
- Hold reasons enable you to report on the reasons you're withholding invoices and invoice adjustments from supplier payments.

### **Ship-From and Bill-From Addresses on Supplier Invoices and Supplier Invoice Adjustments:**

- We add ship-from and bill-from addresses to the header and invoice lines of supplier invoices and supplier invoice adjustments. This enables you to send ship-from and bill-from addresses to third party tax software and helps you to calculate tax accurately.
- This feature enables you to send bill-from and ship-from addresses to a third-party system for tax calculations and makes the process of invoice creation more efficient.



## Supplier Accounts

### **Supplier Accounts - Miscellaneous Enhancements:**

- We now display the machine learning status of these worktags for supplier invoice requests, in addition to supplier invoices, in the Machine Learning Recommendation column of the Maintain Worktag Usage task:
  - Cost Center
  - Location
  - Region
- This enables you to see whether machine learning is enabled on these worktags for supplier invoice requests and supplier invoices.



# **Workday Adaptive Planning Release Notes**



## Adaptive Planning User Experience

### Changes to User Interface

- Workday Adaptive continues its alignment with Workday to provide a more consistent user experience
- The following pages can be updated with a responsive design by updating Visual Preferences in Administration
  - Reports Overview
  - Scenario Manager Overview





## Machine Learning Predictive Forecaster

**Powered by machine learning (ML), the Predictive Forecaster leverages historical data to populate specified forecast versions with ML predicted data**

- A choice between eight algorithms can be selected to perform the prediction
  - The Auto-Fit algorithm is a machine learning algorithm developed by Workday that automatically picks from the available algorithms based on your specific historic data and trends
- The forecaster is batch based and will display the associated statuses

### **Benefits of using the Predictive Forecaster**

- Seeds plan versions with ML-generated data which serves as a starting point for budget managers
- The forecaster uses science and math-based approach to forecasting, which can minimize the time-consuming manual process

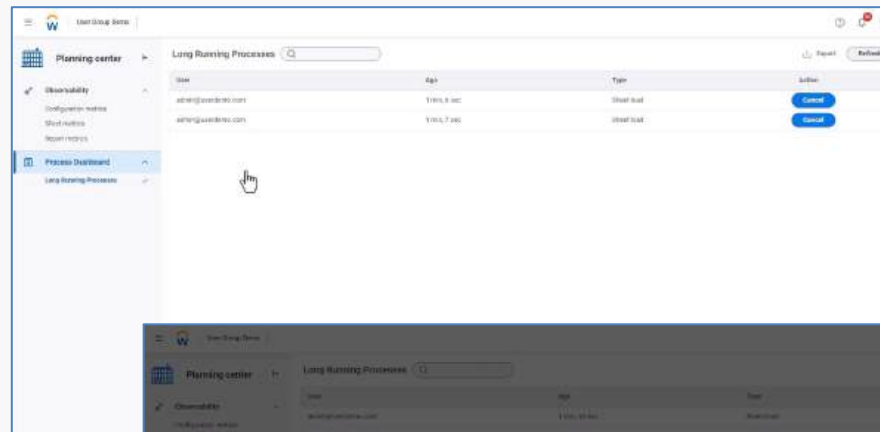
## Long-Running Processes in the Planning Center

### In Planning Center, Workday provides a new section called the Process Dashboard

- Provides a list of processes that are running over 30 seconds
- Processes can be cancelled

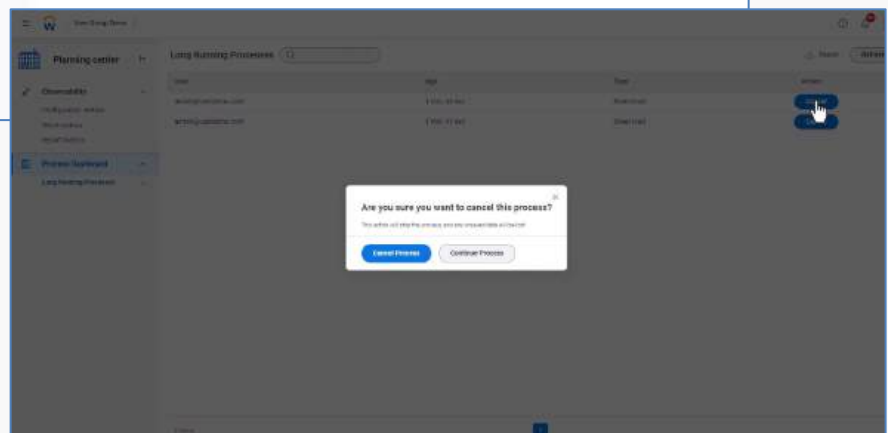
### Long-Running Processes that can be monitored

- Sheet Loads
- APIs
- Admin updates
- Excel exports
- Imports



### Display

- Processes running over 30 seconds
- The user who initiated the process



## Archived Versions for Data Freeze

### Benefits

- This new feature enables you to make changes to actuals, structures, and linked accounts without losing the integrity of leaf-level data in historical versions

### Changes

- Modeling hierarchies (accounts and levels) without affecting the leaf data
- Restate actuals data without affecting actuals overlay or plan data
- Reconfigure linked accounts without affecting the data in archived versions

### Calculate Formula Values Effect

- To convert to Archived version, 'Calculate Formula Values' must be unselected first, causing the version to recalculate

Access Control

Locked version

Archive version

Administrators Locked Except Notes ▾

Users Locked Except Notes ▾

Editable sheet access Locked Except Notes ▾

Group <Select> ▾

Access level <Select> ▾



## Codes for Calendars and Modeled Sheet Display Columns

### **Add editable codes for calendars**

- Adds consistency along with code changes in the 2024 R1 release
- Identify calendars and display columns uniquely
- Changes also reflected in the API

## Attributes

### **Create Associations with Attributes**

- Users and User Groups can be associated to level and dimension attributes.
  - Associations can be updated without modifying access rules

### **Support Attributes in Association Loaders**

- Mapping attribute names in column mapping tab of association loaders
  - Eases the inclusion of attributes in association loaders

## HTML Report Enhancements

### Model Reports Scheduling

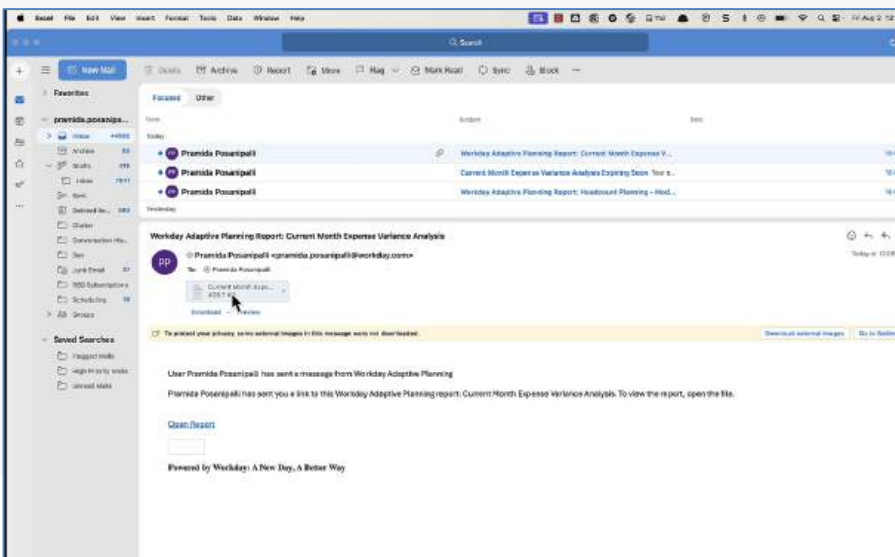
- Model reports can be scheduled as live reports or snapshots like the matrix reports scheduling released in R1

### Rename Matrix Report Property

- Renamed Optimize report for faster load time label to Optimize report execution
- Renamed Advanced header to Optimization

### Send Scheduled Reports as Attachments

- Enables end users to schedule matrix and model reports as Excel attachments in email notification

A screenshot of the 'Create Schedule' dialog box. The 'Schedule Name' field is 'Schedule - Current Month Expense Variance Analysis'. The 'Frequency' is set to 'Daily'. The 'Time' is '12:00' and 'AM'. The 'Time Zone' is '(GMT-08:00) US/Pacific'. The 'End Date' field is empty. The 'Action' section has three radio buttons: 'Create Snapshot', 'Send Live Report Notification', and 'Send Report as Attachment', with the last one selected. There are 'Next' and 'Cancel' buttons at the bottom.



## Write Back from OfficeConnect to Adaptive Planning

### **Workday enables you to submit data edits from valid leaf-level intersections in OfficeConnect reports to Adaptive Planning**

- Allows the update of planning data without leaving Excel
- Utilize Excel capabilities

### **The following edits are supported in writeback mode:**

- Accounts: Cube, Custom, GL, Assumptions
- Levels: Leaf levels only
- Versions: Plan versions and scenarios
- Dimensions: For cube accounts all dimensions must be present
- Attributes: Dimension attributes and corresponding dimensions must be present



# Write Back from OfficeConnect to Adaptive Planning

AutoSave [OFF] OC Writeback Demo Examples

File Home Insert Draw Page Layout Formulas Data Review View Automate Help OfficeConnect

Log Out Update Refresh Workbook User Labels Label Selection Clear Task Pane Filters Hide Zeros Linked Expand Collapse Keep Remove Explore Elements Properties Settings Book Design Show Only Only Cell

B11 20000

Reporting: Pla... DEMO\_SCOTTC

	Jan 2022	Feb 2022	Mar 2022	Q1 2022
1000 Assets	\$ 8,342,815.57	\$ 8,537,745.85	\$ 8,709,926.05	\$ 8,709,926.05
2000 Liabilities and 3000 Equities	\$ 8,342,815.57	\$ 8,537,745.85	\$ 8,709,926.05	\$ 8,709,926.05
3900 Net Income	\$ 179,050.07	\$ 199,003.24	\$ 172,901.05	\$ 550,954.36
4000 Revenue	\$ 485,088.58	\$ 524,012.62	\$ 539,318.44	\$ 1,548,419.64
5100 Non-Operating Income	\$ -	\$ -	\$ -	\$ -
5500 Cost of Goods Sold	\$ 236,342.41	\$ 255,375.78	\$ 260,027.94	\$ 751,746.13
6000 Expenses and 7000 Allocations	\$ 69,696.11	\$ 69,633.61	\$ 106,389.45	\$ 245,719.16
6110 Salary & Wages	\$ 20,300.00	\$ 20,000.00	\$ 48,950.75	\$ 88,950.75
6120 Commission	\$ 19,611.67	\$ 19,611.67	\$ 21,525.00	\$ 60,748.33
6130 Bonus	\$ 960.00	\$ 960.00	\$ 960.00	\$ 2,880.00
6210 Health Benefits	\$ 1,623.00	\$ 1,623.00	\$ 1,623.00	\$ 4,869.00
6220 Retirement	\$ 2,024.57	\$ 2,024.57	\$ 2,024.57	\$ 6,073.70
6230 Payroll Taxes	\$ 5,716.27	\$ 4,703.55	\$ 4,101.41	\$ 14,521.22
6240 Recruiting	\$ -	\$ -	\$ -	\$ -
6310 Training	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 3,000.00
6311 New Hire Training	\$ -	\$ -	\$ -	\$ -
6321 From Prepaid	\$ 841.67	\$ 841.67	\$ 991.67	\$ 2,675.00
6322 Other Equipment Rental	\$ 1,300.00	\$ 4,900.00	\$ -	\$ 6,200.00
6340 Telephone	\$ 264.00	\$ 264.00	\$ 264.00	\$ 792.00
6350 Legal & Professional	\$ 1,050.00	\$ 1,050.00	\$ 1,050.00	\$ 3,150.00
6360 Office Supplies	\$ 2,125.00	\$ 2,125.00	\$ 2,125.00	\$ 6,375.00
6381 Existing Assets	\$ 2,348.00	\$ 2,348.00	\$ 2,348.00	\$ 7,044.00
6382 New Assets	\$ -	\$ -	\$ -	\$ -
6410 Airfare	\$ 1,300.00	\$ -	\$ -	\$ 1,300.00
6420 Hotel	\$ 750.00	\$ -	\$ 750.00	\$ 1,500.00
6430 Meals	\$ 255.00	\$ -	\$ 255.00	\$ 510.00
6440 Mileage/Parking	\$ 150.00	\$ -	\$ 150.00	\$ 300.00
6450 Other T&E	\$ 180.68	\$ -	\$ 10,000.00	\$ 10,180.68
6999 Other Expense	\$ 100.00	\$ 100.00	\$ 100.00	\$ 300.00
IT Allocation In	\$ 1,888.88	\$ 1,881.55	\$ 1,878.52	\$ 5,648.94
Office Rent Allocation In	\$ 809.60	\$ 809.60	\$ 809.60	\$ 2,428.80
Training Allocation In	\$ -	\$ -	\$ -	\$ -
HR Allocation In	\$ 666.20	\$ 666.20	\$ 666.20	\$ 1,998.60
EXEC Allocation In	\$ 2,966.18	\$ 2,985.89	\$ 2,946.52	\$ 8,898.59
FINS Allocation In	\$ -	\$ -	\$ -	\$ -

Sheet last refreshed 6/2/ Not Current

AutoSave [OFF] OC Writeback Demo Examples

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Log Out Update Refresh Workbook User Labels Label Selection Clear Task Pane Filters Hide Zeros Linked Expand Collapse Keep Remove Explore Elements Properties Settings Book Design Show Only Only Cell

B12 19611.6666666667

Reporting: Pla... DEMO\_SCOTTC

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6110 Salary & Wages	\$ 150,000.00	\$ 16,000.00	\$ 20,000.00	\$ 88,950.75
6120 Commission	\$ 19,611.67	\$ 19,611.67	\$ 21,525.00	\$ 60,748.33

Workday Adaptive Planning





## Data Integration

### Integration Planning Data Source Scalability

- Streaming of exportData API can now export 2.0M rows up from the prior limit of 0.5M records
  - Faster performance
  - Ability to export more data
- Excluded from the enhancement
  - System account, Model Sheet Assumption Account, Cube Account with Custom Time Stratum
  - All modeling features, except: weighted average translation, text rollups, spread and value lookups

### Manage JDBC Sources in Data Agents

- An existing JDBC source can be associated to a new data agent without requiring support

### Replace Mode by Level for Model Sheet Import in Planning Data Loaders

- Data can be replaced by level when importing into modeled sheets
  - Improves user experience and making it easier to target exactly the modeled sheet data that needs to be replaced



## Armanino's Workday Experts

For more information on the recent release of Workday please connect with our team. Whether it's support, expanded use of the platform, integrating with other applications or training, our team can advise.

Email our experts at [experts@armanino.com](mailto:experts@armanino.com).



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# **APPENDIX**



## HCM: Change Job New User Experience

Workday continues to enhance the change job experience for other business process workflow steps. Workday supports a consistently streamlined experience by providing the simplified user interface throughout different steps of the Change Job business process.

This update provides:

- Updates to the user experience, including editable review steps.
- New page layouts that clearly and intuitively display changed information, supporting reviewers and approvers in the change job process.
- Includes updates for Mobile as well.

### Notes:

- ✓ Features are automatically available to opt into.
- ✓ Requires testing, if these features are utilized by your organization



## HCM: Consolidated Hire Business Process

This consolidated experience helps to streamline the hiring process and increase efficiency by reducing manual effort. It also now enables you to add payment elections for a worker during the hiring process, which helps to reduce administrative workload and the likelihood of payment delays.

Subprocess that are now allowed:

- Assign Employee Collective Agreement
- Assign Pay Group
- Change Organization Assignments for Worker
- Edit Government IDs
- Edit Service Dates Payment Election Enrollment Event
- Service Date Changes

### Notes:

- ✓ Feature is automatically available to configure.
- ✓ Requires testing, if these features are utilized by your organization



## Time Off and Leave Reporting Updates

Workday has updated standard reports in the Time Off and Leave functional area to provide more information to the end user and more report fields.

- **Leave Percentage in Leave Results Report** – new Leave Percentage column displayed in Leave Results reports.
- **Employee ID in Carryover Reports** – new Employee ID column to Carryover Reports
- **Absence Reporting on Time Off Entry and Time Off Event Business Objects** – new report fields: Absence Threshold Status Indicator for pending time off,

### Notes:

- ✓ Features are automatically available
- ✓ Increase in reporting ability and efficiency for standard reports
- ✓ May require testing, if these standard reports are utilized by your organization



## Payroll: Worker Tax Filing Data

Workday continues to enhance the Get Quarterly Worker Tax Filing Data web service.

These enhancements help you comply with government requirements and vendor specifications.

Effective 2025-01-01, we update the Get Quarterly Worker Tax Filing Data web service, enabling you to report hours worked in Oregon for the Oregon Workers Benefit Fund tax.

### Notes:

- ✓ Features are automatically available



## People Experience: Journeys

Workday adds a Maintain Journey Category Types task that enables you to map your existing Unassigned categories to Workday-delivered category types.

We also add a Category Types modal that enables you to browse through a carousel displaying all the category types such as Onboarding, Job Transition, Leave of Absence, Offboarding.

This workflow enables you to associate all unassigned categories to a category type delivered by Workday.

### Notes:

- ✓ Feature is automatically available.

### Use Cases:

- ✓ Increases reporting capabilities.





## Talent Optimization: Autosave for Guided Experience Employee Reviews

Workday delivers autosave for Guided Experience Employee Reviews for desktop users. Workday also replaces the Save for Later button for Guided Experience reviews, and automatically saves your work every 90 seconds.

### Notes:

- ✓ This feature is automatically available.
- ✓ Allows employees to more seamlessly enter and exit their performance reviews before submitting.



## Benefits: Benefit Elections User Experience Redesign

The Benefit enrollment landing page and current elections summary is being transitioned to the card framework workers' view of their benefit elections.

Worker's view of their current benefit elections from the grid to the card format in these locations:

- Benefit Election tab in the Benefits and Pay Hub
- Benefits tab in the worker's Profile.
- Current Benefit Elections page

### Notes:

- ✓ Feature is automatically available.
- ✓ Updates to Job Aids may be necessary.



## Recruiting: External Career Site Enhancements

Workday updates the External Career Site framework to deliver usability and accessibility enhancements for the apply flow.

Updates include:

- Accessibility for job applications
- The experience of using assistive technologies for all pages of the application.
- Default country on my information page is now more intuitive.

### Notes:

- ✓ Features are automatically available.



## Recruiting: Candidate Home Enhancements

Workday updates the Candidate Home framework to deliver usability and accessibility enhancements for external candidates.

Updates include:

- Job Alert tasks will display in side panel, Delete Job Alert task is now a pop up modal.
- Side panel enabled for My Application tasks.
- Tasks redesigned to display as popup modals: complete questionnaire, take candidate assessment, update Candidate US Veteran status.

### Notes:

- ✓ Features are automatically available.
- ✓ Updates to Job Aids may be necessary.



## Core Payroll: Custom Validation for On-Demand Payments

Configure custom validations for on-demand payments. Provides you with better support and flexibility to configure and maintain custom validation rules for on-demand payments.

Updates include:

- Utilize the Maintain Custom Validation task.
- The Off-Cycle Payment category has been renamed to On Demand Payment

### Notes:

- ✓ Feature is automatically available to utilize.

### Use Cases:

- ✓ Create rules like Payment date has to be equal or greater than the current date



## Advanced Compensation: Statement Visible Column

Workday 2024R2 adds the new Statement Visible column to the below reports.

You can now see at a glance which statements are visible to your workers.

- Compensation Review Statement History.
- View Compensation Review Statements

### Notes:

- ✓ Feature is automatically available.
- ✓ May impact training material.



## Reporting: Data Labels for Matrix Charts in Discovery Boards

Users can now view data labels on Matrix charts in discovery boards.

This feature reduces the need for users to export data to view data labels saving user time and helping users consume the viz insights.

Updates include:

- Users can choose to display data labels on Matrix charts by selecting the 'Display Data Labels' check box from the Options tab in the Configurations panel.
- This enables viewers to consume and compare exact values when working on a discovery board. Users can display data labels on all measures or selected measures.

### Notes:

- ✓ Feature is automatically available to opt in.

**Workday Human Capital Management**

