POSSIBLE (RE)DEFINED

Ask the Experts: Workday 2025 Release 1

March 20, 2025

Certified

B

Corporation

WELCOME

Today's Presenters

Beth Taggart
Solution Architect,
Workday HCM

Taylor Jackson
Solution Architect,
Workday Financials

Gabe Macis
Solution Architect,
Workday Adaptive Planning

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ARMANINO

Firm Overview

Our Promise

Armanino delivers **impactful, bold solutions** that **increase clarity and spark success** for today and tomorrow.

When it comes to your success, we know addressing today's challenges is just as important as planning for the future. Our teams bring deep industry experience to help organizations reach peak performance today, and to help you prepare for the future.

Snapshot

2700+ Employees

Team Members in **45 States**

18th Largest CPA & Consulting Firm

Locations

CALIFORNIA
San Ramon
San Jose
San Francisco
Los Angeles (2)
Irvine
El Segundo
Woodland Hills
San Luis Obispo

COLORADO
Denver

CANADA
Vancouver

IDAHO
Boise

TENNESSEE
Nashville

INDIA
Ahmedabad

ILLINOIS
Chicago

TEXAS
Austin
Dallas

PENNSYLVANIA
Philadelphia
Scranton

NEW YORK
New York City
Garden City

MISSOURI
St. Louis   St.
Charles

WASHINGTON
Bellevue

LOCATIONS
- Office
- Employee (by State/Country)
- Client

Armanino Services Overview

CONSULTING

CFO Advisory
- Financial Management
  - Financial Reporting
  - Audit Preparation
  - Interim Finance Management
  - Post transaction integration
  - Financial Analysis
  - Forecasting & Budgeting
  - IPO Readiness
  - Technical Accounting
- Valuations
- Equity Management
- Transaction Advisory Services
- Fraud and Forensics

Business Outsourcing Services
- Transactional Processing
- Financial Reporting
- Month-end Close
- Interim Financial Management
- Corporate Finance & Restructuring
- HR & Executive Search

Software Solutions
- Implementation Services
- Customization & Integration
- Support & Training
- Solutions
  - Enterprise Resource Planning (ERP)
  - Customer Relationship Management (CRM)
  - Budgeting, Planning & Forecasting
  - Equity Management Solutions
  - Financial Close
  - Data Analytics & BI

Management Advisory
- Assessments & Roadmaps
- Business Process Improvement
- Software Selection & Utilization
- Business & Technology Roadmap
- Business Transformation
- Benchmarking
- Program Management

TRUST

Audit
- Financial Statement Audits
- Financial Statement Reviews
- Agreed-Upon Procedures
- Compilations
- Revenue Recognition Planning
- Benefit Plan Audits
- SEC Audits
- Construction Project Cost Advisory

Risk Assurance & Advisory
- Business Continuity Planning & Management
- Cybersecurity & Privacy Services
- Contract Compliance Audits
- HITRUST Certification Services
- Enterprise Risk Management
- Internal Audit
- ISO 27001
- SOC Audit & SOC Compliance
- SOX Compliance
- Third-Party Assurance & Vendor Risk Management

TAX
- Tax Provision
- International Tax
- Transfer Pricing
- State & Local Tax
- Sales & Use Tax
- Stock Option Accounting (123R) &
- Complex Tax Data Analysis
- R&D Credit Studies
- Net Operating Loss Limitation Analysis (Section 382)
- M&A Consulting & Due Diligence
- Pre-IPO Tax Consulting
- SEC Tax Compliance & Strategy

WEALTH ADVISORY
- Individual Tax Planning
- Succession Planning
- Trust & Estate Planning
- International Tax Consulting
- Collaborative Divorce
- Family Office Services
- Private Wealth

FAMILY OFFICE

Business Management
- Assist in Purchase or Lease of Homes, Autos and Other Personal Property
- Arrange Mortgage Financing & Refinancing
- Liaison with Attorneys Regarding Business & Contract Matters
- Liaison with Agents & Personal Managers on Business Matters

Royalty & IP Services
- Copyright & Intellectual Property Valuations
- Music Catalog Valuations
- Royalty and Licensing Examinations
- Merchandising Examinations
- Publishing Administration

Armanino's Workday Practice

Workday Services Partner

- ✓ Full Financials, HCM, & Adaptive Partner
- ✓ 140+ Workday Implementations
- ✓ Full-Platform Experience
- ✓ Managed Services & Post Go-Live Support

The Armanino Solution

- ✓ 6K+ Clients
- ✓ Technical, Functional, and Industry Expertise
- ✓ Deep Product Experience
- ✓ Industry Leading Methods & Tools

Nationally Recognized

- ✓ Top 20 Consulting Firm
- ✓ 40+ Certified Consultants
- ✓ 100% Onshore
- ✓ Certified Workday Project Managers
- ✓ Certified Workday Integration Developers

HCM

HCM: Compensation/Payroll

Minimum Wage in Compensation
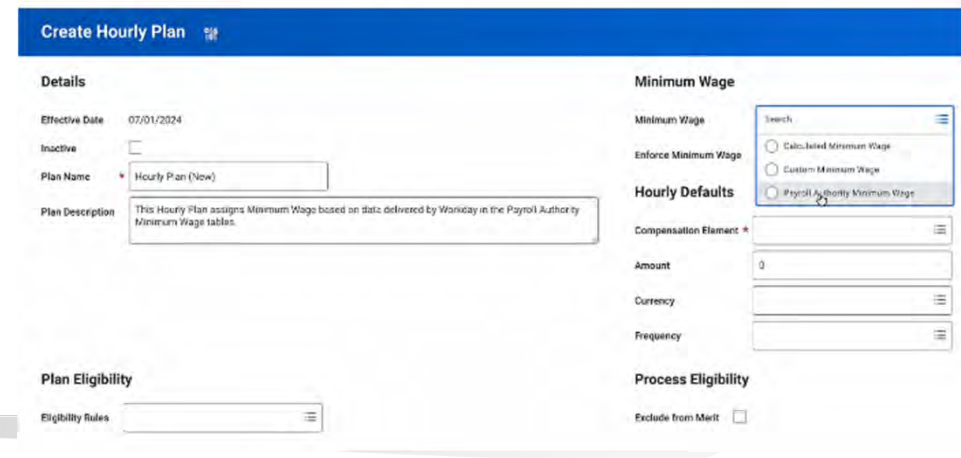
Description: Configure hourly plans or mass update existing hourly plan assignments using:

- A flat rate
- Minimum wage rates, maintained by Workday Payroll
- A calculation

Business Benefit: Become compliant with minimum wage rates and reduce administrative processes and complicated workarounds.

Setup Effort: High Effort, High Impact

Considerations: There is a mass operations management task that will allow yu to mass update hourly plan assignments. If doing so, thoroughly test the impact this will have on your hourly population.

HCM: Core HR/Onboarding

Workday Docs and Document Generation for Onboarding Business Process

Description: Document generation is now supported on the onboarding business process!

Business Benefit: There is more flexibility now on the Onboarding business process to allow ease in formatting and review / signature.

Setup Effort: Low effort

Use Case: As part of onboarding, generate documents that are tailored to your new hires vs static policy documents.

HCM: Core HR/Onboarding

New Workday Onboarding Experience

Description: Send personalized and engaging messages to new hires at defined stages of their onboarding experience! You can now assign your new hires an **Onboarding Plan** that contains all the information they need throughout their onboarding experience. Additionally, there is now a **Onboarding Planner** hub for administrators.

Business Benefit: This new functionality allows you to send targeted preboarding content to candidates as soon as they receive an offer or employment agreement, bridging the gap until they receive access to Workday.

Setup Effort: High effort, high impact

Considerations: Change Management and thorough testing of this feature should be done to plan for a seamless transition.

HCM: Core HR
Job Description Generation on Job Profile

Description: Quickly create Job Descriptions with generative AI.

Business Benefit: Job Description Generation on Job Profile leverages generative AI to enable users to quickly create consistent, high-quality job descriptions. This improves the data integrity of your job profiles by saving time and reducing manual effort. It provides uniformity, easy customization, and scalability to meet users' organizational needs.

Setup Effort: Review your subscription to understand if the feature will be automatically available or not. Low effort.

Considerations: Wait 24 hours for the Generate with AI button to appear on your Job Descriptions.
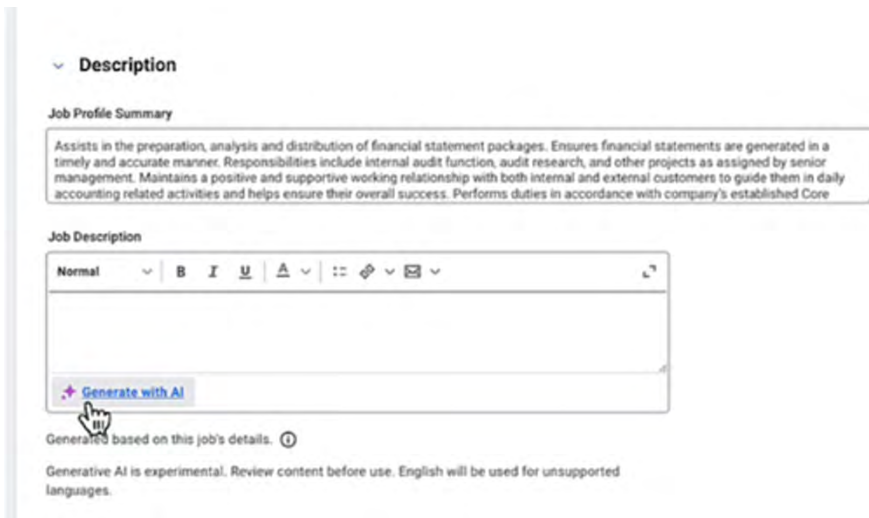
HCM: Payroll

External Payroll Documents Worker Review

Description: Enable workers to review, acknowledge, and sign external payroll documents electronically. Enables you to send to single workers for document worker or in mass.

Business Benefit: Increases efficiency and may help you to meet legal and compliance requirements.

Setup Effort: low effort

Considerations: only for Adobe, docusign, and Workday e-signature

HCM: Time Tracking

Flexible Check-in and Check-out

Description: configure custom thresholds around check-in and check-out times within which your workers can adjust their time entries.

Business Benefit: This enables workers to record their hours with precision, even when there are delays between arriving at work and checking in or between checking out and leaving. You will now have the data you need to pay employees for all their worked time so that you can meet compliance requirements. This feature also saves time for managers and administrators who no longer have to make adjustments.

Setup Effort: Low effort

Considerations: This feature only applies to the check-in and check-out time entry methods.

- If Flexible Check-In and Check-Out is enabled, then you can't enable:

  - Shift-Based Check-In

  - Geofences By Scheduled Shift Location

Engagement Builder

Description: Workday now delivers Engagement Builder, a redesigned version of Campaigns that enables greater control and visibility into your campaigns and audience interactions.

Business Benefit: Create and manage audiences and engagements from a centralized workspace with improved search and filtering.

▪ Experience faster processing times, especially for high-volume engagements, and greater observability into engagement performance.

▪ Run engagements using Integration System User accounts, which can prevent interruptions to your engagements.

▪ Schedule engagements automatically rather than manually.

Setup Effort: Medium effort

Considerations: ability to deactivate audiences is on the roadmap

HCM: Talent Optimization

Mass Populate Worker Profile and Skills

Description: enable you to mass populate worker profiles with skills. This task enables you to choose the skills you want to populate based on these possible sources:

- Explicit skills for workers' primary job profiles.

- Suggested skills based on workers' primary job profiles.

Business Benefit: This feature enables your organization to proactively load skills on to worker profiles instead of relying on the individual workers to do it. More skills on more worker profiles means your organization can optimize the use of the features in Skills Cloud.

The notifications sent to workers upon execution of the task will also increase workers awareness and engagement with their skills data improving accuracy.

Setup Effort: Medium Effort

HCM: Payroll

Payslip Timing

Description: You can now control the time of day payslips and direct deposit notifications are visible.

Business Benefit: This is useful when making payments to terminated workers.

Setup Effort: Low effort

Considerations: The time set is based in the worker's time zone.

Create Payroll Action Reason

Type	*	× On Demand Payment
Reason	*	Test
Payslip Visibility Time Override		× 12:00 AM

FINS

FINS: PSA

Transfer Project Time Blocks within Closed Time Entry Periods

Description: We now enable you to transfer time blocks within closed time entry periods without triggering time calculations or retroactive payroll calculations to run.

Business Benefit: This feature enables you to:

- Move time blocks to a different project in a closed period, supporting updates in billing without impacting payroll.

- Maintain work in progress for long periods, and then transfer associated time blocks to other projects.

- Recoup billable hours.

Setup Effort: Tenant-wide Allow Transfers Within Closed Time Entry Periods check box on the Project Transfer Options tab on the Set Up Project Billing Configuration task.

Considerations: We deliver a new Project Transferred in Closed Period report field, which enables you to identify the time blocks that were transferred in a closed time entry period. If there are retroactive payroll triggering events prior to the project transfer time block event, the project transfer occurs and recalculates payroll.

FINS: Banking

Additional Settlement Run – Advanced Filters

Description: Workday expands the advanced settlement filtering for payment categories by enabling you to now select open intercompany transactions as well as on-cycle and off-cycle payroll payments in settlement runs using reporting capabilities.

Business Benefit: This enhancement provides you with more granular control over payable documents that you're settling, greater flexibility in filtering open items, and extended use for your custom report fields.

Setup Effort: Copy a standard report to create a custom report then update the custom report filter conditions using delivered and calculated fields to return the open items that you want to select for settlement.

Create your settlement run filter

You can run the custom report that's used in the settlement run report filter independently to preview the filtered results in a settlement run.

Considerations: When you create a custom report, you'll need to share it with all authorized users. This enables users to see the related actions on the settlement run report filter.

FINS: Procurement

ML Automatically Links Supplier Invoice Lines to Associated Purchase Order Lines

Description: Machine Learning now automatically links supplier invoice lines to their associated purchase order lines when you create a supplier invoice.

Business Benefit: Enabling Machine Learning for purchase order line linking improves supplier invoice processing efficiency by eliminating the need for you to link supplier invoice lines to their associated purchase order lines manually when you create a supplier invoice.

Setup Effort: On the Supplier Accounts OCR Tenant Options task, we add a new Machine Learning PO Line Linking option that enables the new machine learning PO Line matching model in your tenant.

You must also leave Machine Learning PO matching enabled (that is, don't click the Disable check box) if you are using PO Line Level Matching.

Considerations: When you uptake this feature, it might take up to 2 weeks for machine learning to begin returning matched line recommendations.

Project Phases & Tasks for Fixed Fee Customer Contract Lines, for Cost-Based % Complete

Description: Workday enables you to add 1 or more project phases and project tasks to fixed fee project contract lines when creating and maintaining customer contracts, for cost-based percent complete revenue recognition. Provides phase and task granularity for percent complete configurations using these Estimated Cost Factor options: Baseline, Forecast, & Manual Input

Business Benefit: 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.

Setup Effort: Automatically Available

Considerations: This capability already exists for:

- Project time and expense contract lines.

- Value-based project contract lines.

- Fixed fee project contract lines when percent complete is calculated by hours.

Services CPQ

Description: Workday delivers Services CPQ, a Configure, Price, Quote solution designed for services quoting, as a new addition to the Professional Services Automation (PSA) product suite.

Business Benefit: Services CPQ allows you to manage your entire opportunity to cash flow within Workday

- Quoting speed and accuracy by enabling your sales team to create fast and accurate quotes for the services you sell.

- Unification across CPQ and PSA by using quote data to automate the creation of projects and customer contracts, reducing complex and error prone manual data entry.

- Resource demand insights by increasing visibility into the opportunity pipeline and quotes in Workday.

- Document automation by dynamically generating client-facing documents like SOWs.

- Governance by standardizing the quoting process across your business, including reviews and approvals.

- Reporting visibility by surfacing key insights, such as margin and profitability, to maximize operational efficiency of your services business.

Setup Effort: Subscribe to Services CPQ in Workday and ensure access to Projects and Project Billing functionality.

Adaptive Planning

Introducing Shared Scenarios

- **Sharing Scenarios**
  - + **Personal Scenarios can be shared with other collaborators**
  - + **Enabled in the Workflow**
  - + **Benefits**
    - Improve collaboration, providing more visibility and input from stakeholders
    - Improves accuracy in your budgets and plans and save time
    - Automatic notifications increase efficiency of communications and workflow

Add Reports on Dashboards

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- Benefits
  - Dashboards can embed HTML Reports

- Changes
  - Report can have a maximum of 1 million cells to a dashboard
  - When viewing reports:
    - Download and add report or line notes
    - Drill down by available dimensions
    - Drag and resize report
    - Copy and paste reports within and across dashboards
    - Use grid mode to expand reports and view the full toolbar
    - Enable report parameters to sync with the dashboard perspective context filters
  - Load a maximum of 4 reports at a time 2 on each row
  - Add and load a report first before adding a second report
  - Sync a maximum of 10 report parameter types

Report Bursting Through Schedule Attachments

- Benefits
  - Recipients can review report results in the convenience of the email notification without having to navigate to the application

- Changes
  + Schedule matrix and model reports as Excel attachments in email notifications
  + Schedule and distribute to multiple users using recipient's data access for up to 250 users
  + Distribute reports based on specific parameters or dimensions

Report Parameter Behavior
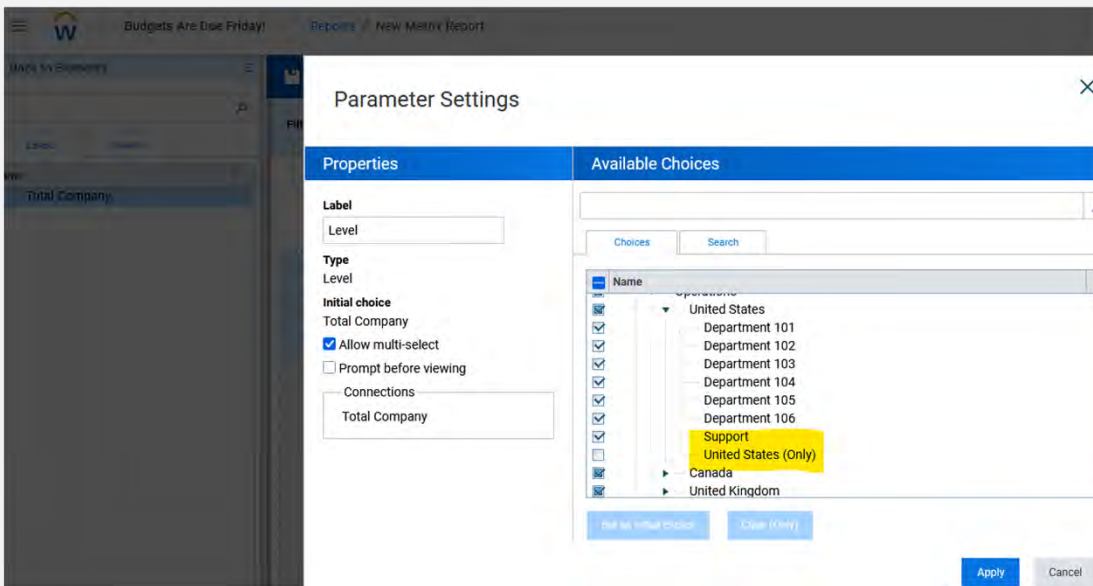
- Benefits
  - Create report parameters consistently
  - Automatically include new values as available

- Changes
  - If all values except (only) and (uncategorized) are selected, any new values are automatically added as choices
  - This functionality applies to both as a report filter or report row
  - Existing reports do not apply, they will require updating the available parameter choice and save

Chart and Dashboard Improvements
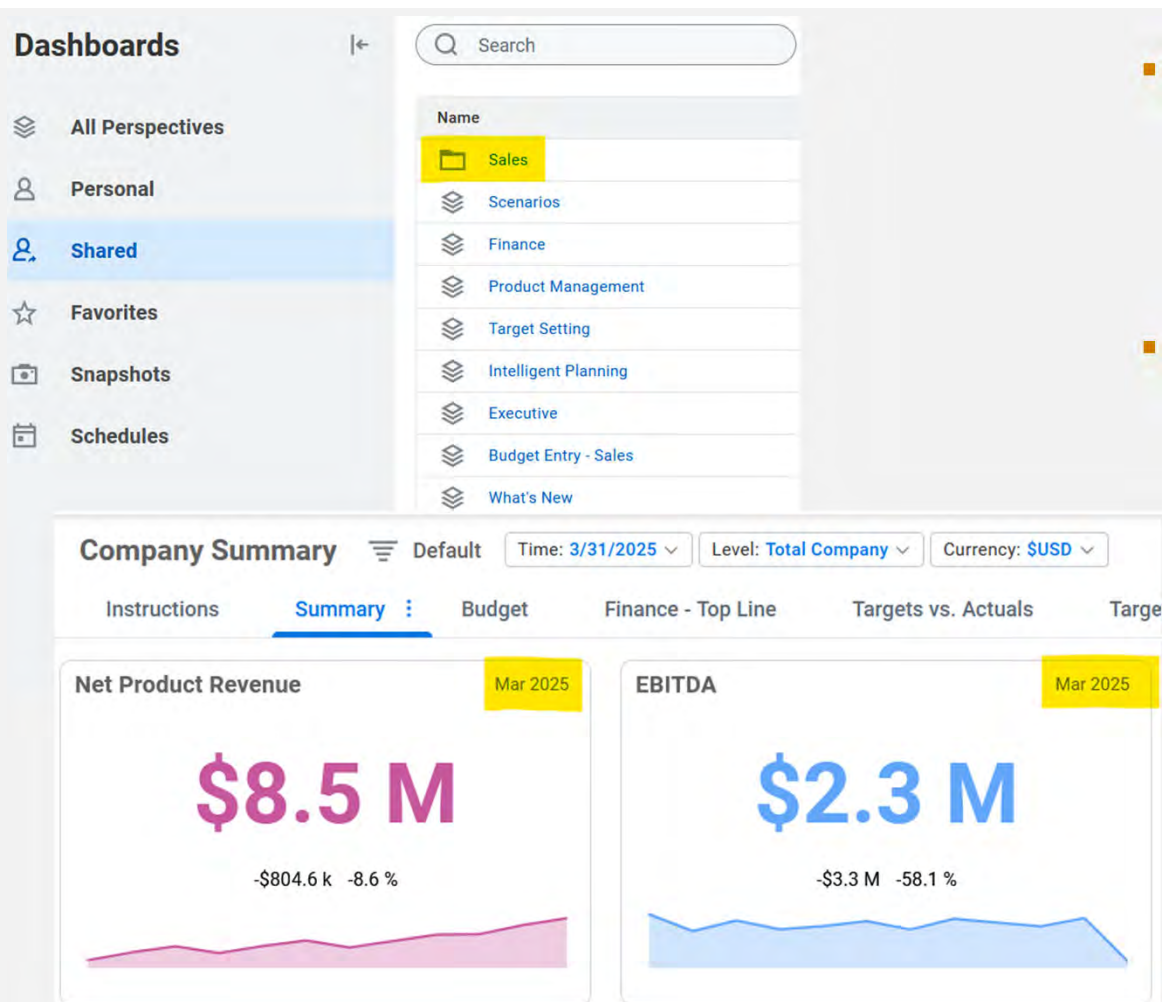
- Benefits
  - Chart improvements make it easier to focus on the data and find all available chart actions
  - Folders for perspectives adds more ways to organize your perspectives

- Changes
  - Time Periods can be shown or hidden on a chart
  - Position Time period next to chart name
  - Folders can now be added to organized perspectives

Modeled Sheet Data Validations

- **Benefits**
  - Greater control over user-entered data in modeled sheets

- **Changes**
  - The maximum number of rules has been increased from 10 to 15 active rules
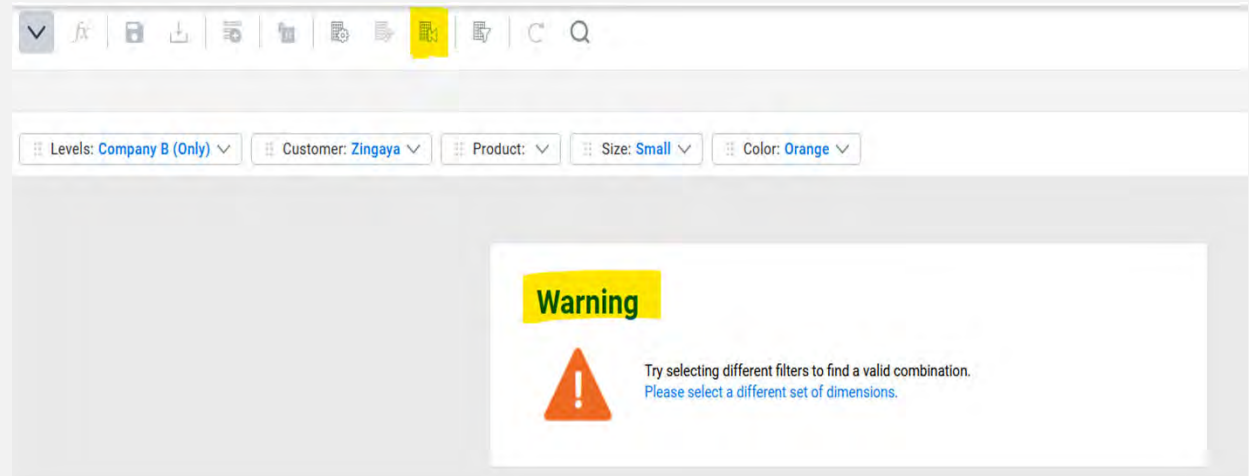
Reset to Default View on Sheets

- **Benefits**
  - Easier to troubleshoot when you are can't load your sheet

- **Changes**
  - 'Reset to Default View' will be available if your sheet can't be loaded due to invalid filters and display option settings
  - An error message will clarify if you can reset to the default view or contact your administrator

LightGBM Algorithm Supports Lever Sheets For Predictive Forecaster

- Benefits
  - + The LightGBM algorithm is used primarily for demand forecasting. This new feature enables regressor data to be added along with reference data to influence the machine learning forecasts.

- Changes
  - + Lever Sheet drop-down option is available when the LightGBM algorithm is selected.
  - + Up to 3 modeled sheets can be used for levers

Forecast Explanations for Predictive Forecaster

- New Feature
  - Requires the feature to be enabled
  - Provide a chart and explanatory text to understand the factors that contributed to the forecasted data

- Benefits
  - Helps in demystify machine learning predictions

- Changes
  - New option, Forecast Explanation
    - Provided in the Confidence Metrics tab of the Forecast History

Design Integrations and Data Agent Enhancements

- Benefits
  - Simplifies the integration process, making it easy to directly load data from Snowflake into Adaptive
  - Continued compatibility and support for Kettle scripts and plugins for Data Agents

- Changes
  - Snowflake displays as an option when you navigate to Integration >> Design Integrations >> Create New Data Source
  - Upgraded Data Agent running on Java 11 and Pentaho Kettle PDI 9.3
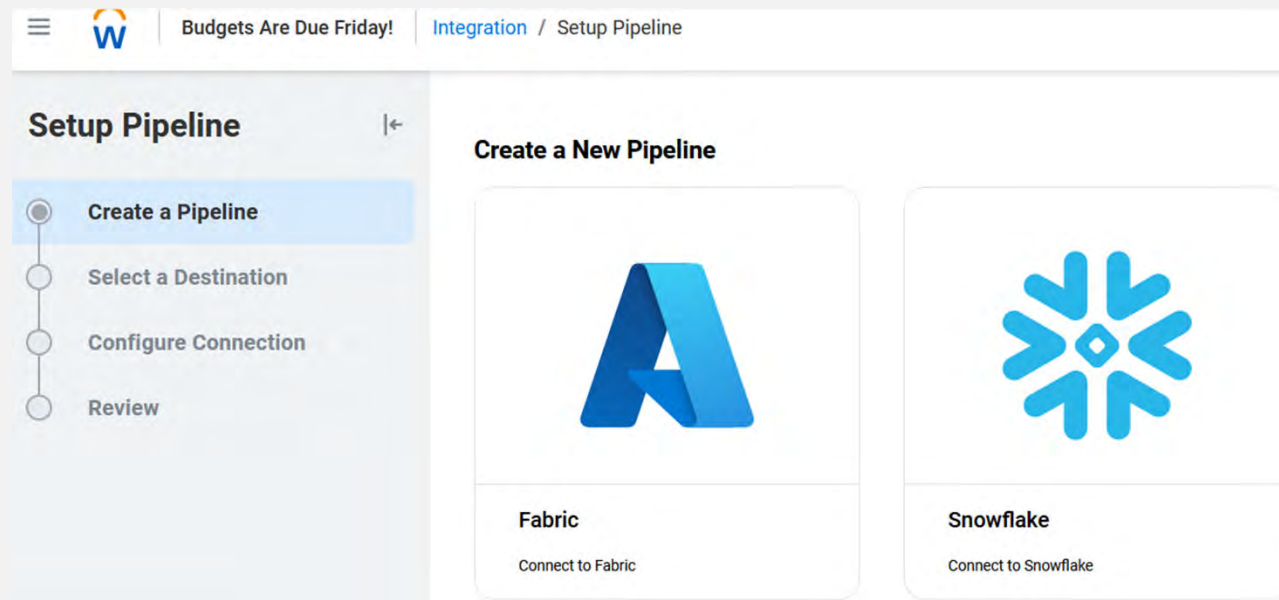
Q&A

Thank you for attending

Additional Questions?

Reach out to us at

Experts@armaninoLLP.com

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OUR PROMISE TO YOU

Reimagine Your Potential

Unconventional
Approach

We're a vested, entrepreneurial partner who sees your organization through a 360 lens and finds opportunity at every stage

Comfort in
Change

Our experts provide guidance and support while quickly facilitating transformation that gives you a competitive advantage.

Focused on
You

Our integrated teams and solutions deliver tailored insights to bring you more value and clarity throughout your journey.

A new and better way for today and tomorrow

Equipping you with the insights and tools needed to redefine what's possible

COMPLIANCE & REGULATORY

ASSURANCE & ADVISORY

STRATEGY & PLANNING

STAFFING & DEVELOPMENT

TECHNOLOGY SYSTEMS

ACCOUNTING & BACKOFFICE

- **Tax Planning**
- **Trust & Estate**
- **SOX**
- **Contract**

- **Cybersecurity**
- **SOC**
- **Restructuring**
- **Revenue Recognition**

- **Corporate Strategy**
- **Strategic Advisory**
- **Benchmarking**
- **Business Transformation**

- **Payroll**
- **Health Benefits**
- **Executive Search**
- **Interim Placement**

- **ERP**
- **CRM**
- **Business Intelligence**
- **Managed Services**

- **Bookkeeping**
- **Budgeting/Forecasting**
- **Account Receivable**
- **Accounts Payable**

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Possible *(Re)Defined*™

Delivering impactful, bold solutions that increase clarity
and spark success for today and tomorrow.

Armanino Operates in an Alternative Practice Structure:

"Armanino" is the brand name under which Armanino LLP, Armanino CPA LLP, and Armanino Advisory LLC, independently owned entities, provide professional services in an alternative practice structure in accordance with law, regulations, and professional standards. Armanino LLP and Armanino CPA LLP are licensed independent CPA firms that provide attest services, and Armanino Advisory LLC and its subsidiary entities provide tax, advisory, and business consulting services. Armanino Advisory LLC and its subsidiary entities are not licensed CPA firms.