



2024R1 Update

# Workday Feature Release Highlights

Armanino's Top Picks of New Features





## 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 2024R1 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@armaninollp.com](mailto:experts@armaninollp.com).



## Personal Data - Active Consent Preferences for Workers

Workday has introduced functionality for organizations transparently inform workers of how they intend to process and report on their personal data. Organizations can either require that the worker consent to or acknowledge the organization's custom message that informs them of the intended usage.

- **Active Consent** – grants the ability for employees to opt in or opt out of allowing the data to be used to defined usages.
- **Acknowledgement** – requires opt in through the acknowledgement but keeps them informed prior to entering their data.

### Acknowledgement

- ✓ Worker cannot opt-out of data entry
- ✓ Creates transparency with employees while enforcing entry of required data
- ✓ Not supported by calc engine to exclude in reports or from integrations

### Both

- ✓ Customer defines all text presented to the worker, including labels
- ✓ Allow different consent options by country
- ✓ Utilize the same list of personal data fields to require consent or acknowledgement



## Worker Messaging

### Summary:

All Workday customers can now easily communicate messages active workers through an easy task to message workers via Email, SMS, and Push Notifications.

### How it Works:

After enabling the correct security policies, permitted users can send newly created, or pre-built message templates to workers via the task “Message Workers”

### Why to Use it:

- Prompt required employee action in a timely manner through reminders for important things such submit timesheets, complete benefit enrollments, and more.
- Create efficiencies with your organization’s internal communication strategy with custom recyclable message templates
- Reduce potential for data compliance issues and save money by not having to use third party message vendors!



## Candidate Messaging

### **Summary:**

This update also allows for SMS Messaging with candidates throughout the entire recruiting process.

### **How it Works:**

Grant recruiters the correct domain permissions, once enabled, recruiters will have a candidate action option to communicate messages to candidates throughout

### **Why to use it:**

Reduce delays in the job application lifecycle  
Enhance the candidate experience to give them a warm first impression of your organization  
Create a “one stop shop” for your recruiters for their communication methods and organize their candidate engagement history.



## Payroll Insights using Machine Learning

### Feature Overview:

- Workday Payroll (US Only) feature that presents payroll result insights with extensive filtering capabilities.
- Machine Learning functionality designed to identify pay cycle abnormalities to reduce time and effort performing payroll exception audits.
- Extensive filtering capabilities can present a comprehensive view with the option to narrow results to individual pay components
- Payroll Administrators create tags results to provide feedback which Workday incorporates into machine learning over time to continuously improve insights and adjust pattern recognition as organizations evolve.

## Benefits Billing Reporting

Workday can now track a “benefits billing status” for individual workers who cannot to cover their benefit deductions.

### Use Case #1

#### Employee Protection

- Protects employees from hardship by having entire paychecks erased by large retroactive deductions and arrears

### Use Case #2

#### Reduces Direct Billing Burdens

- Organizations can amend their leave policies by relying on Workday’s functionality to track benefits billing of unpaid LOA periods

### Use Case #3

#### Hourly Worker Flexibility

- Allows for flexible repayment options to workers paid hourly so they can take PTO and sick time as needed.

## Change Job – Machine Learning and Template Simplification

### Machine Learning Suggestions

- Improves data accuracy and creates efficiencies in the Employee Lifecycle by providing suggestions in key fields for administrators right under the field.
- Fields with suggestions include:
  - Change Job Reason
  - Job Profile
  - Cost Center
  - Location
- Simply opt in to the Innovation Services Agreement for the Machine Learning Recommendations for Change Job and wait two weeks for the machine learning functionality to absorb enough data to support the suggestions

### Simplified Templates

- Consolidates the view and eliminate un-needed data fields presented when initiating a job change.
- Simply access the Maintain Change Job Templates task to:
  - Select the new checkbox to enable the new user interface
  - Update the Sections to Display to include only what is necessary for that type of change
- The new template will display only the specified sections on the initiation page, instead of several sequenced pages, providing a seamless and efficient process for managers and HR teams.





## System Governance Improvements

### **Used Based Security Assignment Process:**

Track and control user-based security assignments by enabling and configuring this process to mirror controls used for role-based security assignments.

### **Job Profile Controls:**

Govern your job catalog through a new business process that allows for reviews and approvals when new job profiles are created or modified.

### **Mass Update Report Tags**

Automatically available task allows report administrators to mass assign or unassign reports tags on multiple reports or report groups to support maintenance efforts specific data governance and compliance.



## Adaptive Planning User Experience

- **Link to location to account and level searches**
  - Search results returns links that enables users to see the placement of account or level in the hierarchy
- **Welcome Page**
  - New section, Top Apps that give you quick access to Sheets, Reports, Dashboards
- **New Look for Model Management and Administration**
  - This new look aligns with Workday's user interface and accessibility standard

## Scope Calculation Sheets

- Performance Improvements of Sheets
  - Enable the scope of the calculations to calculate fewer cells
    - Specify time scope for actuals and plan
    - Scope ranges can have dynamic ranges
    - New indicators in sheets view display ranges outside of the scope range

Cube Sheet Properties

Details Settings Initial View **Scope**

Limit the scope of all calculated accounts in the sheet.

**Actuals Values**

Set the scope of the calculations forward (+) or backward (-) relative to the 'Completed Values Through' period.

Start calculating

0 Start of Version

Stop calculating

0 End of Version

**Plan Values**

Set the scope of the calculations forward (+) or backward (-) relative to the 'Start of Plan' period.

Start calculating

0 Left Scroll Limit

Stop calculating

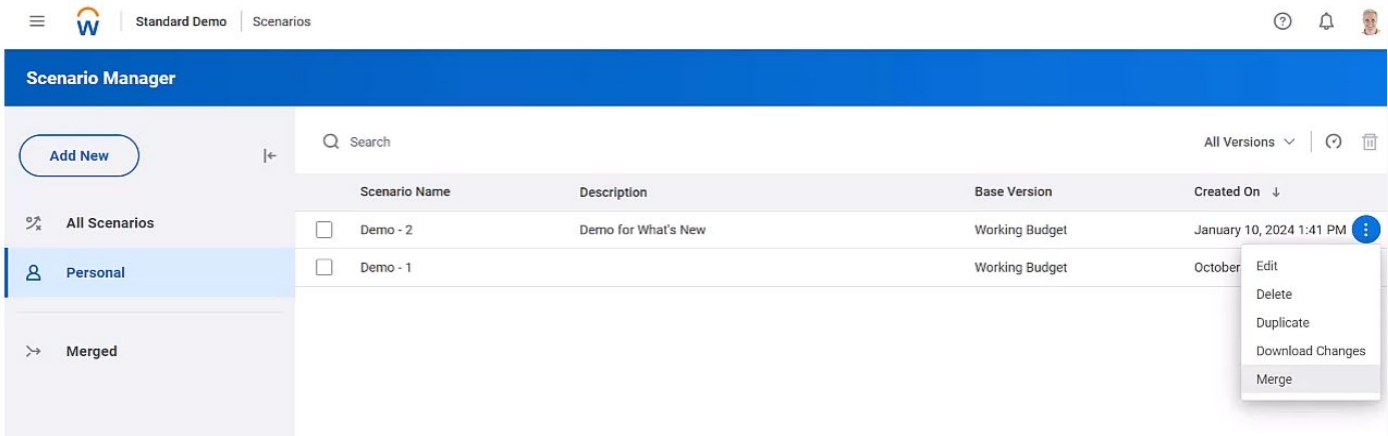
0 End of Version

OK Cancel

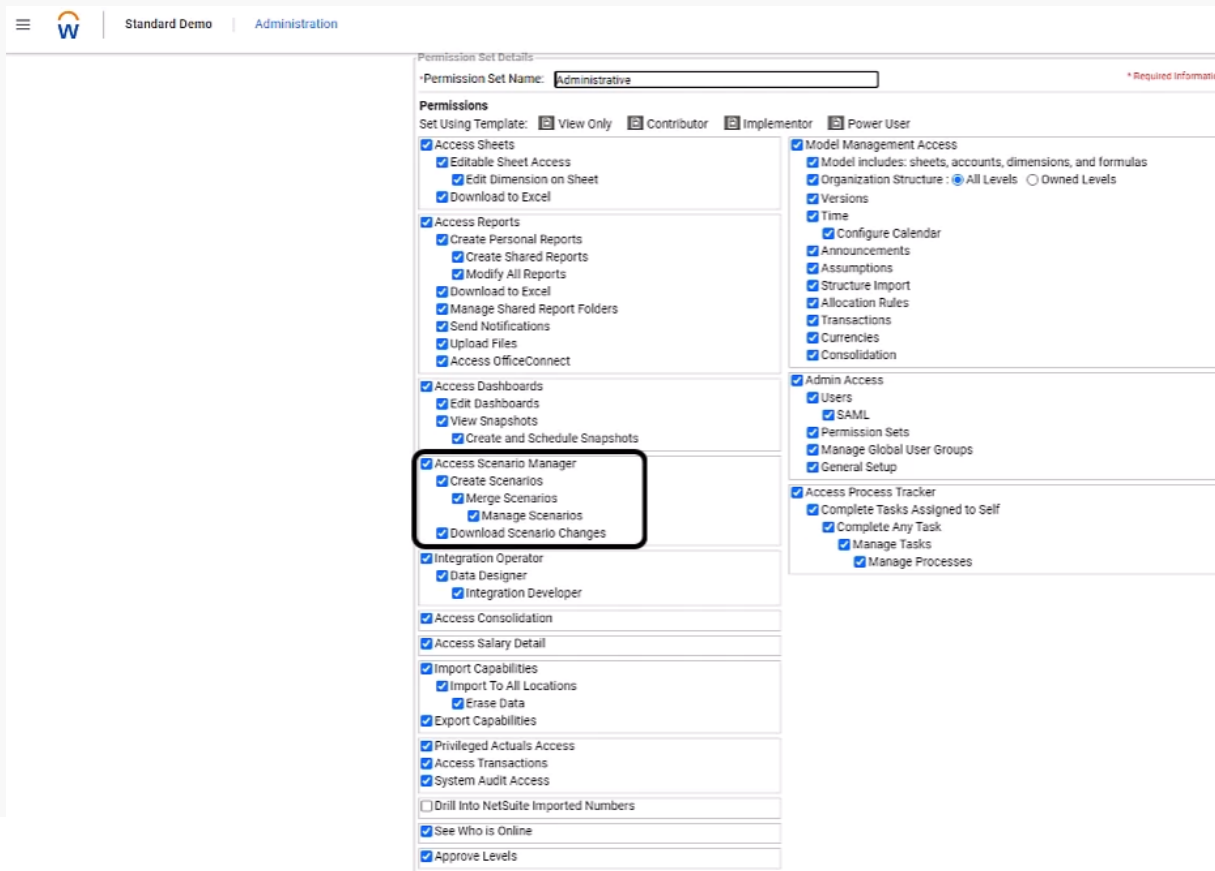
## Personal What-If Scenarios

- Scenarios enable users to test data changes without affecting your data in your plan version.
- Reports and dashboards support scenarios for comparison and analysis
- Scenarios can be merged to plan versions with a few clicks
- The following actions can be performed on Scenarios
  - Edit, Delete, Duplicate, Merge, Download Changes
- New Scenario permissions
  - Access, Create, Merge
- New Menu Option called Scenarios
  - Can create upto 15 scenarios
  - Base scenarios enabled for any plan version
- Visual Indicators in Scenarios
  - Green background for changes
  - Strikethrough text for deleted rows

# Personal What-If Scenarios



The screenshot shows the 'Scenario Manager' interface. On the left, there are navigation tabs: 'All Scenarios', 'Personal' (selected), and 'Merged'. The main area contains a table with columns: 'Scenario Name', 'Description', 'Base Version', and 'Created On'. Two scenarios are listed: 'Demo - 2' and 'Demo - 1'. A context menu is open over the 'Demo - 1' row, showing options: 'Edit', 'Delete', 'Duplicate', 'Download Changes', and 'Merge'.



The screenshot shows the 'Permission Set Details' for the 'Administrative' permission set. The 'Permissions' section is expanded, showing a list of permissions with checkboxes. The 'Access Scenario Manager' section is highlighted with a red box, containing the following permissions:

- Access Scenario Manager
- Create Scenarios
- Merge Scenarios
- Manage Scenarios
- Download Scenario Changes

## Modeled Sheet Data Validations

- Display only rows with data validation errors  
check box
  - New feature option that allows you to filter violate validation rules
- Clone, Download, and Update Modeled Sheets
  - Validation rules are now included when existing modeled sheets are cloned
  - Download and upload modeled sheets include validation rules
- Scenarios in APIs
  - ExportData allows you to enable scenario responses



## Report Scheduling

- Schedule Report Snapshots
  - Shared matrix snapshot reports can be scheduled with optional notifications
  - Notifications include links to the snapshot reports
- Schedule Live Report Notifications
  - Shared matrix live reports can be scheduled as well with optional notifications
  - Notifications include links to live reports
- Report Scheduling Permissions
  - New permissions for report scheduling
    - Create Report Schedules
    - Manage All Report Schedules



## Reports Performance

- Weighted Average Rollup
  - Matrix reports are optimized to support weighted average rollup account fields for improved performance and scalability.



## OfficeConnect – Miscellaneous Enhancements

- Refresh for Multiple Worksheets
  - New display for messages list that can be docked anywhere on the screen
  - Docking position and size is retained for future refreshes
- Primary Ledger Currency
  - Company currency renamed to primary ledger currency in workbook properties
  - The renaming is now consistent with the introduction of alternate ledger currency
- Performance for Expanding Multiple Elements
  - Performance improvement for expanding a row or column where multiple elements are applied
  - Improvement only occurs when Exclude rows with no data option is selected
- Logout from OfficeConnect for Word or Powerpoint
  - When users click log out in Word or Powerpoint, you are automatically signed out of both applications
- Configure Regional Settings
  - Regional settings are now enabled at the sign in page

## OfficeConnect – Enhancements for Financial Management

- View By Dimension for OfficeConnect
  - Users can now view data in a new worksheet as a new report
    - Rows and columns can be selected for the new report
    - Hierarchy levels can be selected as well to expand data

The screenshot displays the OfficeConnect interface within an Excel spreadsheet. The 'View By' dialog box is open, showing options for 'Row element', 'Expand row to level', and 'Column'. The background spreadsheet shows a balance sheet with columns for 'Fiscal Year 2013' and 'Fiscal Year 2014'. The data is as follows:

	Fiscal Year 2013	Fiscal Year 2014
Assets	\$ 29,040,834.92	\$ 40,837,084.82
Current Assets		40,837,084.82
Liabilities		(32,897,295.00)
Current Liabilities		(10,754,796.67)
Equity		(14,430,349.00)
Capital Stock		3,009,521.48
Retained Earnings		666,030.85
CTA		

## OfficeConnect – Enhancements for Financial Management

- Alternate Ledger Currency Support in OfficeConnect
  - This allows report users the following:
    - Report on alternate and primary ledger currencies
    - Drill into differing sets of journal entries for both currencies

The screenshot displays the Microsoft Excel interface with the OfficeConnect ribbon. A 'Workbook Properties' dialog box is open, showing the 'Format' tab. The 'Date settings' section includes a 'Report date' field set to 'Friday, January 12, 2024'. The 'Currency settings' section has two radio buttons: 'Primary ledger currency' (selected) and 'Corporate currency'. The background shows a financial report with columns for 'Ledger Currencies' and 'Primary Ledger Currencies'.

	2013 - Q4	
	Primary Ledger Currencies	USD
5,580,876.39	\$	5,580,876.39
2,386,799.78	\$	2,386,799.78
1,766,290.57	\$	1,766,290.57
1,015,627.38	\$	1,015,627.38
412,158.66	\$	412,158.66
-	\$	-



## Chart Improvements in Dashboards

- Functionality and Appearance Improvements
  - Resize chart legends
  - Resize and move chart data labels
  - Toggle off individual data series
- Formatting Improvements
  - Change font color
  - Highlight text
  - Strikethrough text
  - Clear formatting
  - Font size choices
  - Linked text formatted with an underline
- New Chart
  - Fan charts have been added to the dashboards to visualize variances

## Code Fields for Metadata

- Sheet Codes for Cube and Modeled Sheets
  - Code Prefix renamed to Code
  - Code can be edited for both Modeled and Cube sheets
  - Toggle off individual data series
- Account Group Codes
  - New Code field for account groups for the following hierarchies:
    - Assumptions
    - Cube accounts
    - Custom accounts
    - Metric accounts
    - Modeled accounts
- Container Codes for Dimensions and Attributes
  - Code fields added for dimension and attribute containers
  - Codes are now required to be used in formulas
- Sheet APIs affected by the new code field changes
  - `exportAccounts`, `importModeledSheet`, `exportSheets`, `exportDimensions`, `updateDimensions`

## Adaptive Planning APIs

- Manage External user Groups in Adaptive Planning
  - Admins can enable editing of external user groups in Adaptive Planning in General Setup
  - Only External datasource user groups can be edited after importing groups thru importGroups API
- API to Export User Groups and Group Members
  - Users can now export both user groups and group members thru the API
- CreateUser, updateUser, exportUser APIs
  - The following attributes have been added to the user apis:
    - Homepage
    - Perspective
    - Dashboard
- API for Deleting users
  - Users can be deleted from Adaptive Planning thru the API



## New Currency Added

- Caribbean Guilder
  - Currency Code XCG, Caribbean Guilder has been added to Currencies



## 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@armaninollp.com](mailto:experts@armaninollp.com).



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