



# Financials Features Review

Workday 2025R1

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# Your hosts



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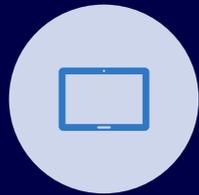
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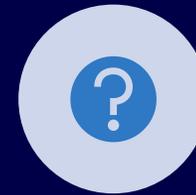
# Housekeeping items



*All lines will be muted for today's webinar*



*Please submit any questions via the Q&A feature throughout the presentation*



*We will leave time at the end of the presentation for an additional Q&A*



*There will be a brief survey sent out at the end of this webinar*



*We will be following up with a FAQ Sheet with the Q&A from the session*

# Release preparation

## Check Release Center

- Review Automatically Available items
- Subscribe to important Release Notes in Community
- Review retirement Release Notes

## Change management plan

- Changes to the user experience or process updates
- Retiring functionality
- When to uptake Setup Required functionality

## Prepare the tenant

- Run audit reports and resolve issues:
  - In Production **before** Sandbox Preview is updated with the release
  - In Sandbox Preview **after** it is updated with the release

## Execute test plans

- Test integrations first
- System data validation
- Critical business processes
- Critical custom reports

Visit Workday's Feature Release Planning Guide (US) here: <https://community-content.workday.com/en-us/reference/learn/get-started/get-started-with-workday/feature-release-planning.html>

# Your team of experts



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# Release features

## Adaptive Planning

- Version-Specific Overrides for Linked Accounts
- Introducing Shared Scenarios
- Adaptive Planning Notifications
- Perspective Folders in Dashboards
- Perspective Favorites in Dashboards
- Add Reports on Dashboards

## Financial Accounting

- Close and Consolidation Hub (2024R2)
- Display Custom Reports on Close and Consolidation Hub

# Release features

## Customer Accounts

- Separate Payments for Customer Refunds in Settlement Runs
- Local Commodity Codes on Invoice Lines
- Service Catalog in Services CPQ

## Spend Management

- Ensure OCR Supplier Invoices Have Required Fields
- Supplier Accounts Hub Enhancements
- Hide or Show Optional Fields on Supplier Invoices
- Ability to Restrict Access to Ad Hoc Inventory Put Aways
- Wave Picking
- Mass Cancel Framework for Inventory Documents
- Manufacturer & Manufacturer Part Number as Primary Attributes for Purchase Items
- Display All Names for Requisitions Awaiting Action by Multiple Users in the Requisitions Worklet
- Lot and Serial for Consignment Requisitions and Purchase Orders

# Financial Accounting

# Presented by



Kelly Reynolds

Manager Consulting Services

## Close and Consolidation Hub (2024R2)

In case you missed it, Workday released the Close and Consolidation feature in the 2024R2 release that enables you to complete and view close and consolidation tasks and reports from a centralized location.

### Reasons to consider this feature

- Centralizes close and consolidation tasks and reports so that you no longer need to remember task and report names.
- Reduces the number of clicks required to find relevant tasks and reports.
- Provides you with visibility over your close and consolidation process.
- Enables you to address any pending actions quickly and easily.

### What do I need to do

- Configure the New Manage: Close and Consolidation Hub domain
- Configure access to the following domains to view all tasks, reports and new cards on overview page;
  - Public Reporting Items
  - Process: Consolidation Data Capture
  - Setup: Ledger and Book
- Configure and Customize based on user requirements

[Close and Consolidation Hub](#)

## Close and Consolidation Hub (2024R2), cont.

In case you missed it, Workday released the Close and Consolidation feature in the 2024R2 release that enables you to complete and view close and consolidation tasks and reports from a centralized location.

### What happens if I do nothing

- You won't be able to access the Close and Consolidations Hub. This means you won't be able to view close and consolidation insights, tasks, or reports from a centralized location.

### Additional considerations

- It is recommended to use the Maintain Hubs task to configure and customize the Close and Consolidation Hub based on the requirements of the users.
- Any changes that are made impact all users.
- The reports and dashboards provided in the hub should be replaced with relevant reports to the users.
- Hub configuration is enabled for OX 2.0 migration.

# Close and Consolidation Hub (2024R2) demo

## Overview

Close and Consolidation |←

Overview

Data

Close Tasks

Period Close

Overview

Consolidation Data  
Received: 0 / 2 (Line Errors: 0)

Ledger Period Status  
Open: 1 / 2

Close in Progress - Activity Group Status

No results for the criteria configured for this report.

1

No results for the criteria configured for this report.

## Data

Close and Consolidation |←

Overview

Data

Consolidation Data C... ✓

Consolidation Data Capture Hub

Intercompany Reconc...

## Close Tasks

Close and Consolidation |←

Overview

Data

Close Tasks

Intercompany Reconc...

Journal ✓

Allocations

Revaluation

Equity Pickup

Noncontrolling Interest

Account Certification ...

# Close and Consolidation Hub (2024R2) demo, cont.

## Period Close

### Close and Consolidation |←

- Overview
- Data
- Close Tasks
- Period Close**
- Update Ledger Status ✓
- Schedule Ledger Upd...
- Ledger Period Close ...
- Ledger Period Journa...

## Financial Reports

### Close and Consolidation |←

- Overview
- Data
- Close Tasks
- Period Close
- Financial Reports**
- Consol Trial Balance** ✓
- Income Statement
- Balance Sheet - Cons...
- Balance Sheet - Not C...
- Trial Balance - Compo...
- Balance Sheet Retain...

## Balancing Reports

### Close and Consolidation |←

- Overview
- Data
- Close Tasks
- Period Close
- Financial Reports
- Balancing Reports**
- Intercompany Out of ...** ✓
- Intercompany Payabl...
- Cash to Bank Reconci...
- Payables to Supplier ...

# Close and Consolidation Hub (2024R2) demo, cont.

## Reports

### Close and Consolidation |←

- Overview
- Data
- Close Tasks
- Period Close
- Financial Reports
- Balancing Reports

- Reports**
- Find Journals

- Find Journal Lines
- Account Certification De...
- Balance Sheet Certificat...
- Currency Translation Ad...
- Currency Translation Ad...
- Foreign Currency Revalu...

## Dashboards

### Close and Consolidation |←

- Overview
- Data
- Close Tasks
- Period Close
- Financial Reports
- Balancing Reports
- Reports

- Dashboards**
- Account Certification

- Financial Management ...
- Cash Management

## Rules and Configuration

### Close and Consolidation |←

- Overview
- Data
- Close Tasks
- Period Close
- Financial Reports
- Balancing Reports
- Reports
- Dashboards

- Rules and Configuration**

### Rules and Configuration

- > Consolidations
- > Translations Rules and Currency Rates
- > Consolidation Data Mapping
- > Allocations
- > Transaction Matching
- > Account Certification and Reconciliation

# Display Custom Reports on Close and Consolidation Hub

Customize the cards on the Overview tab of the Close and Consolidation hub to display custom matrix reports of your choice

## Reasons to consider this feature

- You can quickly view the information most relevant to your needs when you access the Close and Consolidation hub.
- Instead of removing one of the Workday delivered reports by default if not applicable to your business, you can now override with a matrix report of your choice

## What do I need to do

- Access the new Edit Card by Admin task by clicking the Edit button that is displayed for each card on the Configure Hub by Admin task.
- You can access by going to: Maintain Hubs task, select Action > Configure Overview for the Close and Consolidation hub.
- On the Edit Card by Admin Task, you can configure:
  - A custom matrix report to replace the default report on the card
  - Informational text to display on the card for title and/or subtitle
  - An overview menu to link to other resources, such as websites or reports.

[Display Custom Reports on the Close and Consolidation Hub](#)

# Display Custom Reports on Close and Consolidation Hub, cont.

Customize the cards on the Overview tab of the Close and Consolidation hub to display custom matrix reports of your choice

## What happens if I do nothing

- The Close and Consolidation hub will continue to function as before with the default cards

## Additional considerations

- Setup of any matrix reports you want to display on cards in the Close and Consolidation hub to enable the report to be shown:
  - Mapping the report prompts to the prompts on the hub filters
  - Selecting the required sharing option and output type
  - Any other configuration needed for the report itself.

# Display Custom Reports on Close and Consolidation Hub demo

How the cards are displayed currently, would prefer to use another report instead of Consolidation Data as this entity only has one company

The screenshot displays the 'Close and Consolidation' hub interface. On the left is a navigation menu with the following items: Overview (selected), Data, Close Tasks, Period Close, Financial Reports, Balancing Reports, Reports, Dashboards, and Rules and Configuration. The main content area is titled 'Overview' and contains three report cards. The first card, 'Consolidation Data', is highlighted with a red border and shows 'Received: 0 / 2 (Line Errors: 0)' and a 'No results' message. The second card, 'Ledger Period Status', shows 'Open: 1 / 2' and a donut chart with 1 segment. The third card, 'Close in Progress - Activity Group Status', shows 'No results'.

Close and Consolidation |←

Filter 2

Overview

**Consolidation Data**  
Received: 0 / 2 (Line Errors: 0)

No results for the criteria configured for this report.

**Ledger Period Status**  
Open: 1 / 2

1

Open

**Close in Progress - Activity Group Status**

No results for the criteria configured for this report.

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Display Custom Reports on Close and Consolidation Hub demo, cont.

The custom matrix report is now visible on the Overview section of the Close and Consolidation Hub

**Close and Consolidation** |←

- Overview
- Data ▾
- Close Tasks ▾
- Period Close ▾
- Financial Reports ▾
- Balancing Reports ▾
- Reports ▾
- Dashboards ▾
- Rules and Configuration

[Filter](#) 2

### Overview

#### Average Expense Cycle Times

Received: 0 / 2 (Line Errors: 0)

■ Average of Approval Time (Days)  
■ Average of Payment Time (Days)

#### Ledger Period Status

Open: 1 / 2

1

■ Open

#### Close in Progress - Activity Group Status

No results for the criteria configured for this report.

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Display Custom Reports on Close and Consolidation Hub demo, cont.

Go to the Maintain Hubs task, select actions on the Close and Consolidation and select "Configure Overview"

## Maintain Hubs

23 items

Hub	Action
Academics	Action ▼
Benefits and Pay	Action ▼
Buyer Hub	Action ▼
Campus Engagement Hub	Action ▼
Candidate Engagement	Action ▼
Close and Consolidation	Action ▼
Drive Admin Hub	Configure Overview Customize Hub Navigation Configure Suggested Links
Expenses Hub	

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Display Custom Reports on Close and Consolidation Hub demo, cont.

Identify the default report that you would like to override and select "Edit"

Content

- Default Sections and Cards
- Customize Sections and Cards

Configured Sections and Cards 1 item

+	Order	Section	Title	Cards Contained in the Section				
					Order	Card	Title	
+ -	▼ ▼	× Close and Consolidation Hub - Card Section	Overview	+				
				+ -	▼ ▼	× Consolidation Data	Consolidation Data	<b>Edit</b>
				+ -	▲ ▼	× Ledger Period Status	Ledger Period Status	Edit
				+ -	▲ ▲	× Close in Progress - Activity Group Status	Close in Progress - Activity Group Status	Edit

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Display Custom Reports on Close and Consolidation Hub demo, cont.

Select the check box to edit the Title (and/or subtitle or help text) and then select the custom matrix report

**Edit Card by Admin**

Card Name Consolidation Data

Informational Text Overflow Menu Custom Report

**Title**  
Default Title Title  
Customize Title

**Subtitle**  
Default Subtitle Sub-Title  
Customize Subtitle

**Help Text**  
Customize Help Text

Average Expense Cycle Times

**Edit Card by Admin**

Card Name Consolidation Data

Informational Text Overflow Menu Custom Report

Select a custom report to override for data visualizations card.

**Default Report** Close and Consolidation Hub - Consolidation Data Status

**Custom Report**  Average Expense Cycle Times

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Display Custom Reports on Close and Consolidation Hub demo, cont.

The custom matrix report is now visible on the Overview section of the Close and Consolidation Hub

**Close and Consolidation** |←

- Overview
- Data
- Close Tasks
- Period Close
- Financial Reports
- Balancing Reports
- Reports
- Dashboards
- Rules and Configuration

**Overview**

**Average Expense Cycle Times**  
Received: 0 / 2 (Line Errors: 0)

Department	Average of Approval Time (Days)	Average of Payment Time (Days)
71500 Field Sales - LATAM	~3	~10
36400 Consulting Services...	~3	~8
36300 Consulting Services...	~3	~11
40000 Office of CHRO	~3	~14
41500 HR Operations	~3	~11
41200 Payroll	~3	~9
41100 Benefits	~3	~7
61220 Network & Telecom	~3	~7
71400 Field Sales - Asia/P...	~3	~6
61120 IT Helpdesk	~3	~7
71100 Inside Sales	~3	~7
71300 Field Sales - EMEA	~3	~11
33000 Global Support Cen...	~3	~9
61110 Workstation Support	~3	~7
32300 R&D - Product Deve...	~3	~7
51200 Finance Mgmt - FP&A	~3	~12
53000 Legal	~3	~5
70100 Sales Management	~3	~8
41300 Recruiting	~3	~9
51100 Finance Mgmt - Cor...	~3	~4
70000 Sales Executive Mg...	~3	~6
33400 Global Support - LA...	~3	~10

**Ledger Period Status**  
Open: 1 / 2

**Close in Progress - Activity Group Status**

No results for the criteria configured for this report.

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Display Custom Reports on Close and Consolidation Hub demo, cont.

You also have the ability to create a custom announcement with custom image

Close and Consolidation Hub Overview  
Close and Consolidation

### Announcement

1 item

	Order	Rule	Expiration Date	Message From / Message Title	Show Current Photo / Upload Custom Image	Message	Video	Ar
<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Message From <input type="text"/>	<input type="radio"/> Show Current Photo <input checked="" type="radio"/> Upload Custom Image <input type="text" value="logo.png"/>	<input style="border: 2px solid red;" type="text" value="Happy Close Everyone!"/>	<input type="text"/> Title <input type="text"/> Description <input type="text"/> Preview Image <input type="text"/> Video URL <input type="text"/>	

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Display Custom Reports on Close and Consolidation Hub demo, cont.

Company logo with custom message for the users accessing the hub during Month-End Close

Close and Consolidation |←

Filter 2

- Overview
- Data
- Close Tasks
- Period Close
- Financial Reports
- Balancing Reports
- Reports
- Dashboards
- Rules and Configuration

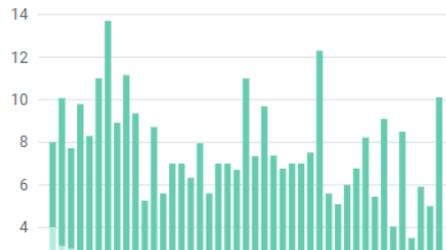


**Happy Close**  
Happy Close Everyone!  
[Read More](#)

Overview

### Average Expense Cycle Times

Received: 0 / 2 (Line Errors: 0)



### Ledger Period Status

Open: 1 / 2



### Close in Progress - Activity Group Status



Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# How we can help you get ready

## Close and Consolidate Hub

- Review existing configuration
  - Review financial accounting and close activities in scope/currently configured
  - Review custom reports and enable for use in the hub
- Configuration Support
  - Domain security policy & security assignment updates
  - Enabling hub functionality
  - Configure only close activities that are relevant or in use for your business (hide the items not in scope)
- Knowledge Transfer for Maintenance of the Hub
  - Override/changes to reports reflected
  - Enabling new financial accounting areas that were previously out of scope
  - Updating of welcome message, photos and reports reflected on overview (landing page)

Contact your Cognizant Engagement Manager or submit a Service Cloud case today.

# Additional features in this release

That are good to know

Feature	Summary	What do I need to do?
<b>New Tasks to assign Match Status for Intercompany Journal Lines</b> <i>Setup required</i>	Marks intercompany journal lines as available or unavailable for matching to support manual intercompany matching and reconciliation reporting.	Configure your security to enable use of the Mass Update Intercompany Journal Lines Match Status and Update Intercompany Journal Lines Match Status tasks
<b>Enhancements to Allocation Pools features</b> <i>Setup required</i>	Enhancements to Allocation Pools feature and delivery of new Allocation Plans. These plans support a financial process that allocates shared costs or revenue across various dimensions based on a top-down, customer-configured structure.	Before you begin using this feature, consider drafting a tiered allocation plan with allocation pools based on your organizational needs. Workday recommends creating allocation pools in order of lowest tier to highest tier.
<b>Worktag Change Lease Amendments</b> <i>Setup required</i>	New Worktag Change lease amendment type to change worktags on contract lines for operating lease contracts.	Access the new task, add a row for the Worktag Change amendment type, and select the checkbox.
<b>View Journal Lines</b>	New Journal Line drill down and related actions on View Journal Lines for operational and accounting entries.	Check your security permissions to ensure you have proper permissions to access the functionality.

<https://doc.workday.com/release-notes/en-us/fincls/8485196.html>  
<https://doc.workday.com/release-notes/en-us/fincls/8684932.html>  
<https://doc.workday.com/release-notes/en-us/fincoretrxn/8438119.html>

# Performance and Reporting enhancements

## Performance enhancements

- Noncontrolling interest beginning balance amount fix
- Intercompany Out of Balance Report improved performance when running for more than 1 million items
- Run Revaluation business process for resilience/usability
- Additional countries added for Address Tax IDs

## Reporting enhancements

- Average Daily Balance new reporting items to use in custom reporting
- New report data source (RDS) to enable to view attachments previously loaded for company ownership detail
- Currency Conversion Rates report data source (RDS) will be retired

# Financial Accounting features at-a-glance

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## Display Custom Reports on Close and Consolidation Hub

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JIRA	FINCLS-49332
Setup effort	Setup required
Change impact	Improves user experience in the Hub, allowing the cards to be customized to display custom matrix reports of your choice

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## Close and Consolidation Hub (2024R2)

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JIRA	FINCLS-43873
Setup effort	Setup required
Change impact	Enables users to complete and view close and consolidation tasks and reports from a centralized location

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# Customer Accounts

# Presented by



Karianny Figueroa

CVS Principal Consultant

# Separate Payments for Customer Refunds in Settlement Runs

Workday enables you to process separate payments for customer refunds in a settlement run

## Reasons to consider this feature

- This provides a more consistent user experience and improves finance efficiency by streamlining manual tasks and eliminating the need for workarounds

## What do I need to do

- On the Maintain Feature Opt-Ins report, opt in to the Customer Refunds Optimization feature
- Enable settings to separate payments for customer refunds on a customer or sponsor profile
- Create a copy of the Find Customers standard report to find customers with Always Separate Refund Payments enabled
- Create a copy of the Find Sponsors standard report to find sponsors with Always Separate Refund Payments enabled
- Create customer refunds with the same settlement company, payee, payee remit-to address, payment type, currency, and bank account
- Settle the customer refunds

<https://doc.workday.com/release-notes/en-us/fincust/8501451.html>

# Separate Payments for Customer Refunds in Settlement Runs, cont.

Workday enables you to process separate payments for customer refunds in a settlement run

## What happens if I do nothing

- If you choose not to opt in to the customer refunds optimization feature, you can't uptake this enhancement
- If you don't select to separate the customer refunds, Workday continues to group refund documents with the same settlement company, payee, payee remit-to address, payment type, currency, and bank account into 1 refund payment

## Additional considerations

- There is a new **Separate Payments** section on the Payment Details page of the Customer and Sponsor profile pages that contains two new fields:
  - **Customer Invoices:** this field replaces the Always Separate Payments field and is used for the same purpose.
  - **Customer Refunds:** this is a new field to separate customer refund payments during a settlement run.
- This new **Separate Payments** section is only visible when **Customer Refunds 2.0** has been enabled.
- If you enter text in the **Memo** field on the **Create Customer Invoice** task, the memo text will continue to appear in the remittance of a single refund payment.

<https://doc.workday.com/release-notes/en-us/fincust/8501451.html>

# Separate Payments for Customer Refunds in Settlement Runs demo

## Opting-In to Customer Refunds Optimization

### Maintain Feature Opt-Ins



This report displays features that are available for early opt-in. Enable an opt-in feature by selecting the Opt In to Feature button. Inactivate an enabled opt-in feature by selecting the Opt Out of Feature button. If the report isn't displaying opt-in features, none are currently available.



Features Available for Opt-In 1 of 30 items



Feature Name	Feature Description	Feature Status	Irreversible	Feature Setting
Customer Refunds Optimization	This enables the new customer refund enhancements. Refund payment documents are created from the settlement runs and separated from the refund documents. After you opt-in to this feature, you can't opt-out.	ON	Yes	

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Separate Payments for Customer Refunds in Settlement Runs demo, cont.

Separate Payments for Customer refunds now an available option to enable for Customer and Sponsors

The screenshot shows a software interface with a top navigation bar containing: Overview, Addresses and Contacts, Contracts, Invoices and Payments, Financial Snapshot, Assigned Roles, Custom Reports, Change History, and Process History. Below this is a secondary navigation bar with: Summary, Credit & Collections, Payment Details (highlighted), Banking Information, Tax Information, Notes, Attachments, and Additional Data. An 'Edit' button is located on the left. The main content area is divided into three sections: 'Defaults', 'Accepted Currencies', and 'Separate Payments'. The 'Defaults' section lists: Payment Terms (Net 30), Default Payment Type (Check), Default Reference Type (empty), Default Currency (USD), and Remit-From Customer (empty). The 'Accepted Currencies' section has two radio buttons: 'Accept All Currencies' (selected) and 'Accept These Currencies'. The 'Separate Payments' section has two rows: 'Customer Invoices' with 'No' and 'Customer Refunds' with 'Yes'. The 'Customer Refunds' row is enclosed in a red rectangular box.

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Separate Payments for Customer Refunds in Settlement Runs demo

“Always Separate Refund Payments” reportable field now available for both customer and sponsor

The screenshot shows a web application interface for finding customers. At the top, there is a search bar with the text 'Find Customers with Facet Search - Copy' and a search button. Below the search bar, there is a section for 'Current Search' with 'Save' and 'Clear All' buttons. A facet search for 'Customer Category' is shown with three options: Business Services (24), Financial Services (19), and Consumer Products (16). The main part of the interface is a table titled 'Find Customers with Facet Search'. A red box highlights the first column of the table, which is labeled 'Always Separate Refund Payments'. A red arrow points from a text box above the table to this column. The table has the following columns: Customer, Customer ID, Customer Name, Customer Status, Customer Approval Status, Customer Category, Customer Group, Default Payment Type, Default Payment Terms, and Parent. Two rows of data are visible in the table.

Always Separate Refund Payments	Customer	Customer ID	Customer Name	Customer Status	Customer Approval Status	Customer Category	Customer Group	Default Payment Type	Default Payment Terms	Parent
Yes	[Redacted]	C-0018	[Redacted]	Active	Approved	Financial Services	Customers A - L	Check	Net 30	
	[Redacted]	C-0001	[Redacted]	Active	Approved	Financial Services	Customers A - L	Check	Net 30	

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Separate Payments for Customer Refunds in Settlement Runs demo

## Separate Refund Payments in a Settlement Run

**Selected Item Information**

Selected Refund Count 8  
 Selected Refund Sum (USD) 3,911.64

Customer Refunds 8 items | 8 selected

The payees below in this settlement run have 2 refunds each.  
 Customer 1 has been configured to separate refunds.

Company	Customer Refund	Payee	Refund Date	Payment Type	Refund Amount	Currency
	Customer Refund: CR-0550	Customer 1	01/08/2025	Check	212.50	USD
	Customer Refund: CR-0549	Customer 1	01/10/2025	Check	106.25	USD
	Customer Refund: CR-0552	Customer 2	01/06/2025	Check	435.50	USD
	Customer Refund: CR-0551	Customer 2	01/05/2025	Check	326.63	USD

Payment Groups **Customer Refund Payments** Process History Background Processes

Customer Refund Payments 6 items

Customer 1 has 2 separate refund payments, while Customer 2 has their refunds grouped into a singular payment.

Payment	Company	Payee	Payment Date	Payment Type	Transaction Reference	Payment Amount	Currency
		Customer 1	01/15/2025	Check		106.25	USD
		Customer 1	01/15/2025	Check		212.50	USD
		Customer 2	01/15/2025	Check		762.13	USD

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Local Commodity Codes on Invoice Lines

Select active commodity codes on the invoice lines for customer invoices, invoice adjustments, and cash sales without the need to populate sales items first

## Reasons to consider this feature

- This enhancement helps you better align with the local industry standards without utilizing the sales item functionality

## What do I need to do

- Nothing, this feature is automatically available

<https://doc.workday.com/release-notes/en-us/fincust/8437210.html>

## Local Commodity Codes on Invoice Lines, cont.

Select active commodity codes on the invoice lines for customer invoices, invoice adjustments, and cash sales without the need to populate sales items first

### What happens if I do nothing

- If you don't configure commodity code types and codes in your tenant, you can't select the codes when you create customer invoices, invoice adjustments, or cash sales

### Additional considerations

<https://doc.workday.com/release-notes/en-us/fincust/8437210.html>

# Local Commodity Codes on Invoice Lines demo

## Commodity Code without a Sales Item

Invoice Lines 1 item

Line	Company	Sales Item	Commodity Code	Revenue Category	Line Item Description	Quantity	Unit of Measure	Quantity 2	Unit of Measure 2	Unit Price	Released on Invoice Lines	Extended Amount	Transaction Date	From Date	To Date	Contract Line	Deferred Revenue	R R S T
Q			TestingReleaseR12025 - Testing	Hardware	Commodity Code with no Sales Item	5	Each	0		5.00		25.00						

Sales item was not required in order to populate the Commodity Code on the line

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Service Catalog in Services CPQ

Workday delivers a Services Catalog in the new Services CPQ functionality that enables you to add a service to the quote from a pre-configured list

## Reasons to consider this feature

- The services catalog allows your sales team to create more accurate quotes quickly for the repeatable services you sell by reducing the manual effort involved in defining the same baseline services manually, providing improved standardization and efficiency across your business

## What do I need to do

- Create a catalog of services for various roles and hours to define the baseline effort needed for the service
- Access the Maintain Services Catalog task
- Click Create Service and specify the values for the duration of the service, roles, items, expenses, and third-party costs. You can also specify the project hierarchy

<https://doc.workday.com/release-notes/en-us/fincpq/8681926.html>

## Service Catalog in Services CPQ, cont.

Workday delivers a Services Catalog in the new Services CPQ functionality that enables you to add a service to the quote from a pre-configured list

### What happens if I do nothing

- You won't be able to add a predefined service from the services catalog to the quote

### Additional considerations

- The services defined in the catalog are created as a High Level service on the quote. Phases and Tasks capability will be added in future releases.

<https://doc.workday.com/release-notes/en-us/fincpq/8681926.html>

# Service Catalog in Services CPQ demo

## Maintain Services Catalog

### Maintain Services Catalog

7 items

🔍
☰
📊
🗨
🔄
📄

**Current Search**

Apply
Clear All

**Business Unit**

Business Unit 1

Business Unit 3

Business Unit 2

**Company**

500.1 Global Modern Servic...

500.2 Global Modern Servic...

**Cost Center**

10000 Office of CEO

**Document Snippets**

Terms and Conditions

Scope

Create Service

Name	Description	Company	Search Tags	Project Hierarchy	Duration (Weeks)	Effort (Hours)	Document Snippets	Status	
General Audit	Conducting a general audit of our client's financial statements or other processes to ensure accuracy and compliance.	500.2 Global Modern Services, Ltd (Canada)	3	CPQ Project Hierarchy	24	1920	2	Active	Action ▼
Accounting Services	Providing accounting services for clients, including financial reporting, bookkeeping, and budgeting	500.2 Global Modern Services, Ltd (Canada)	3	CPQ Project Hierarchy	8	960	2	Active	Action ▼
Professional Services (Inactive)	Professional Services to evaluate our client's overall Cloud Performance for EMEA and NA	500.1 Global Modern Services, Inc. (USA)	2	GMS Projects	12	960	0	Inactive	Action ▼
Software Implementation Services (Add Ons)	Implementing our add on software applications for clients	500.1 Global Modern Services, Inc. (USA)	2	GMS Projects	12	720	0	Active	Action ▼
Professional Services	Professional Services to evaluate our client's overall Cloud Performance for EMEA and NA	500.1 Global Modern Services, Inc. (USA)	2	GMS Projects	12	960	2	Active	Action ▼
Managed Services	The first 12 months of our Networks And Cloud Applications Monitoring managed services		2	GMS Projects	52	208	2	Active	Action ▼
Software Implementation	Implementing custom built	500.1 Global Modern Services	2	GMS Projects	24	2000	2	Active	Action ▼

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Service Catalog in Services CPQ demo

## Create Service

**Edit Service**
|<

- 
- Service Details
- Roles
- Items
- Expenses
- Third Party Costs
- Review Service

### Service Details

**Service Name \***

**Description**

**Company** x 500.1 Global Modern Services, Inc. (USA) ... ⋮

**Search Tags** x Business Unit: Business Unit 1 ... ⋮

x Region: USA - Western US ... ⋮

**Project Hierarchy** x GMS Projects ⋮

**Duration in Weeks \***

**Edit Service**
|<

- Service Details
- Roles
- Items
- Expenses
- Third Party Costs
- Review Service

### Roles

3 items ⌵ ⌶ ⌷

⊕	Order	*Role	*Role Name	Description	*Hours	Billable	Prohibit Discount
⊕ ⊖	▼ ▼	<span style="border: 1px solid #ccc; padding: 2px;">x Business Analyst</span> <span style="font-size: 0.8em;">⋮</span>	<input type="text" value="Business Analyst"/>	<input type="text"/>	240	<input checked="" type="checkbox"/>	<input type="checkbox"/>
⊕ ⊖	▲ ▼	<span style="border: 1px solid #ccc; padding: 2px;">x Consultant</span> <span style="font-size: 0.8em;">⋮</span>	<input type="text" value="Consultant"/>	<input type="text"/>	480	<input checked="" type="checkbox"/>	<input type="checkbox"/>
⊕ ⊖	▲ ▲	<span style="border: 1px solid #ccc; padding: 2px;">x Manager</span> <span style="font-size: 0.8em;">⋮</span>	<input type="text" value="Manager"/>	<input type="text"/>	240	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Service Catalog in Services CPQ demo

## Create Service, cont.

The image displays three overlapping screenshots of the 'Edit Service' interface, illustrating the configuration of different service components. Each screenshot shows a sidebar with navigation options: Service Details, Roles, Items, Expenses, Third Party Costs, and Review Service.

**Top Screenshot: Items**  
The 'Items' section shows a table with 2 items. The first item is 'CPQ Item 1' with a quantity of 5 and a unit of measure of 'Each'. The table has columns for Order, \*Item, \*Item Name, Description, Notes, \*Quantity, Unit of Measure, and Billable.

Order	*Item	*Item Name	Description	Notes	*Quantity	Unit of Measure	Billable
	CPQ Item 1	CPQ Item 1			5	Each	<input checked="" type="checkbox"/>

**Middle Screenshot: Expenses**  
The 'Expenses' section shows a table with 2 items. The first item is 'Airfare Expenses' with a description 'Each consultant will travel onsite per quarter', a billable status of 'Yes', and a prohibit discount status of 'Yes'. The table has columns for Order, \*Expense Name, Description, Billable, and Prohibit Discount.

Order	*Expense Name	Description	Billable	Prohibit Discount
	Airfare Expenses	Each consultant will travel onsite per quarter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Bottom Screenshot: Third Party Costs**  
The 'Third Party Costs' section shows a table with 1 item. The item is 'Laptops' with a description 'Secure laptops for customer data', a quantity of 5, and a unit of measure of 'Each'. The table has columns for Order, \*Third Party Cost Name, Description, \*Quantity, Unit of Measure, Billable, and Prohibit Discount.

Order	*Third Party Cost Name	Description	*Quantity	Unit of Measure	Billable	Prohibit Discount
	Laptops	Secure laptops for customer data	5	Each	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Service Catalog in Services CPQ demo

## Add Service from Catalog in CPQ

The screenshot displays the 'Create Quote' interface for 'Q-012'. At the top, it shows the company 'Bluestar Corporation' and the opportunity 'Opportunity for Bluestar: Professional Services'. The quote status is 'PROPOSED PRIMARY' and 'DRAFT'. The price is '0.00 USD'. Below this, there are filters for 'View By' (Weeks) and a table with columns for 'Quantity', 'Price', 'Cost', and 'FTE'. A table with columns for 'Quote Detail', 'Action', and dates (1/20/2025, 1/27/2025, 2/3/2025, 2/10/2025, 2/17/2025) is shown. A context menu is open over the first row, with 'Add Service from Catalog' highlighted in blue. A red arrow points from this menu item to a detailed service card on the right. The card is titled 'Professional Services' and describes 'Professional Services to evaluate our client's overall Cloud Performance for...'. It lists '12 weeks' and '960 hours' and includes roles like 'Business Analyst' and 'Consultant'. At the bottom of the card, the 'Add to Quote' button is highlighted with a red box.

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Service Catalog in Services CPQ demo

Add Service from Catalog in CPQ, cont.

**Add Service to Quote** Step 1 of 2

**Basic Details**

Service Name \*  
Professional Services

Description  
Professional Services to evaluate our client's overall Cloud Performance for EMEA and NA

Billing Model \*  
Time and Expense

Project Hierarchy \*  
GMS Projects

Start Date \*

**Pricing**

Rate Type  
Hours

Project Billing Rate Sheet  
Simplified Project Billing Rate Sheet - USD

Project Billing Rate Sheet Header Fields  
Currency: USD

Sales Item Price List  
Price List 1 - USD (USD)

Continue Cancel

**Add Service to Quote** Step 2 of 2

Setting Expense and Third Party amount for services will help ensure that roles and items are appropriately priced.

**Expense**

Expense	Description	Amount	Currency	Billable	Prohibit
Airfare Expenses	Each consultant will travel onsite per	5,000.00	USD	<input checked="" type="checkbox"/>	Yes
Hotel Expenses	Each consultant will travel onsite per	5,000.00	USD	<input checked="" type="checkbox"/>	Yes

**Third Party Cost**

Add Cancel

Enter in the details for the expenses and costs included for the service

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Service Catalog in Services CPQ demo

Add Service from Catalog in CPQ, cont.

**Create Quote** Q-012 ⋮

Bluestar Corporation > [Bluestar Corporation: Opportunity for Bluestar: Profe...](#) > Q-012: Opportunity for Bluestar: Professional Servi... [Quote Actions](#) ⌵
PROPOSED PRIMARY DRAFT

View By Weeks ⌵

Quantity

Price

Cost

FTE

Margin %: 15.23 Discount %: 0 Price 104,325.00 USD ✎ Totals

Quote Detail	Action	1/20/2025	1/27/2025	2/3/2025	2/10/2025	2/17/2025	2/24/2025	3/3/2025	3/10/2025	3/17/2025	3/24/2025	3/31/2025	4
<b>Quote: Opportunity for Bluestar: Professional Servi...</b>	⋮												
<span style="font-size: 0.8em;">⌵</span> <b>Service: Professional Services</b>	⋮												
<b>Duration</b>		Professional Services											
<span style="font-size: 0.8em;">⌵</span> <b>Roles (Hours)</b>	⋮	<b>48</b>	<b>80</b>										
<span style="font-size: 0.8em;">👤</span> Business Analyst	⋮	12	20	20	20	20	20	20	20	20	20	20	20
<span style="font-size: 0.8em;">👤</span> Consultant	⋮	24	40	40	40	40	40	40	40	40	40	40	40
<span style="font-size: 0.8em;">👤</span> Manager	⋮	12	20	20	20	20	20	20	20	20	20	20	20
<span style="font-size: 0.8em;">&gt;</span> <b>Items</b>	⋮												
<span style="font-size: 0.8em;">&gt;</span> <b>Expenses</b>	⋮												
<span style="font-size: 0.8em;">&gt;</span> <b>Third Party Costs</b>	⋮												

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Customer Accounts features at-a-glance

---

## Separate Payments for Customer Refunds in Settlement Runs

---

JIRA	FINCUST-28758
Setup effort	Setup required
Change impact	Settlement specialist will now see separate payments for the same payee if feature is enabled for that customer

---

---

## Local Commodity Codes on Invoice Lines

---

JIRA	FINCUST-38319
Setup effort	Automatically available
Change impact	Data entry specialists will no longer need to enter in a sales item to identify the commodity code for an invoice

---

---

## Service Catalog in Services CPQ

---

JIRA	FINCPQ-7576
Setup effort	Setup required
Change impact	CPQ Administrators can now create and manage pre-configured service catalogs that can be used to easily add services to quotes

---

# Projects

# Project Budgets - Time and Expense for Phase and Task

Workday enhances Project Budgets by enabling you to use time and expense contract lines to create revenue plan lines at the project phase and task level

## Reasons to consider this feature

- This enhancement allows you to accurately account for project time and expense at the phase and task level within a single budget

## What do I need to do

- Continue using contract rate sheets to create project budgets as usual

<https://doc.workday.com/release-notes/en-us/finprj/5996149.html>

## Project Budgets - Time and Expense for Phase and Task, cont.

Workday enhances Project Budgets by enabling you to use time and expense contract lines to create revenue plan lines at the project phase and task level

### What happens if I do nothing

- If you don't use contract rate sheets with project budgets, you won't notice any change

### Additional considerations

- None

<https://doc.workday.com/release-notes/en-us/finprj/5996149.html>

# Project Budgets - Time and Expense for Phase and Task demo

Contract lines referencing project phases/tasks

<span>Overview</span> <span>Project Plan</span> <span>Resources</span> <span>Financials</span>											
<span>Plan</span> <span>Summary</span> <span>WIP Aging Analysis</span> <span>Capitalization</span> <span>Contract / Billing</span>											
Contract / Billing 4 items											
Contract Line Type	Contract	Contract Line Amount	Phases	Tasks	Project Transaction Source	From Date	To Date	Bill-To Customer	Billing Schedule	Standard Rate Sheet	Contract Rate Sheet
Project Time and Expense	4079: [redacted] 05/02/2022	1,147,030.00			Time	05/02/2022	03/28/2025	[redacted]	[redacted]_BILLING_S CHEDULE-11-119		Rate Sheet [redacted]
Project Time and Expense	4079: [redacted] 05/02/2022	8,000.00	Acceptance Deploy Implement Transition	Acceptance > Final Acceptance (03/28/2025 - 03/28/2025) Deploy > Deployment Checklist (03/21/2025 - 03/21/2025) Deploy > Notify Constituents (03/21/2025 - 03/21/2025) Implement > Develop Prototypes (06/06/2022 - 03/07/2025) Transition > Complete Acceptance Test (03/10/2025 - 03/14/2025) + More (2)	Expense	05/02/2022	03/28/2025	[redacted]	[redacted]_BILLING_S CHEDULE-11-119		Rate Sheet [redacted]
Project Time and Expense	4079: [redacted] 05/02/2022	2,000.00	Implement	Implement > Develop Prototypes (06/06/2022 - 03/07/2025)	Misc Expense	05/02/2022	03/28/2025	[redacted]	[redacted]_BILLING_S CHEDULE-11-119		Rate Sheet [redacted]
Project Time and Expense	4079: [redacted] 05/02/2022	15,000.00	Implement	Implement > Develop Prototypes (06/06/2022 - 03/07/2025)	Supplier Invoice	05/02/2022	03/28/2025	[redacted]	[redacted]_BILLING_S CHEDULE-11-119		Rate Sheet [redacted]

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Project Budgets - Time and Expense for Phase and Task demo

## View initial project budget calculation

The screenshot shows a software interface for project budgeting. On the left, there are summary cards for Forecast Revenue (9% under baseline), Forecast Cost (2% under baseline), Forecast Margin (12% under baseline), and Forecast Margin % (2% under baseline). A 'Reporting Period: January' is set. Below this, a 'Project Financial Plan' section shows 'Implementation Baseline' selected. A 'Plan' menu is open, with 'View Initial Calculation' highlighted. The main view is a table titled 'View Initial Project Budget Calculation' showing 106 items. The table has columns for Period, Resource, Role, Hours for Period, Ledger Account, Source, Cost Rate, Cost Rate Currency, Cost Amount (Source Currency), Cost Amount (Plan Currency), Cost Worktags, Billable Hours, Billing Rate, Billing Currency, and Revenue Amount (Source Currency). The first row shows a Project Manager role for 4 hours, with a cost rate of 75.00 USD and a revenue amount of 1,000.00.

Period	Resource	Role	Hours for Period	Ledger Account	Source	Cost Rate	Cost Rate Currency	Cost Amount (Source Currency)	Cost Amount (Plan Currency)	Cost Worktags	Billable Hours	Billing Rate	Billing Currency	Revenue Amount (Source Currency)
05/02/2022-05/31/2022		Project Manager	4		Resource Forecast	75.00	USD	300.00	300.00	36100 Consulting Services - North America Define Structure > Conduct Discovery (05/26/2022 - 05/27/2022) Project Manager Salaries	4	250.00	USD	1,000.00

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Transfer Project Time Blocks within Closed Time Entry Periods

Transfer time blocks within closed time entry periods without triggering time calculations or retroactive payroll calculations to run

## Reasons to consider this feature

- 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

## What do I need to do

- Access the Set Up Project Billing Configuration task.
  - On the Project Transfer Options tab, select the Allow Transfers Within Closed Time Entry Periods check box.
  - Identify time blocks that need to be moved to another project in a closed period.
  - Transfer the identified time blocks to another project through these supported tasks: Transfer Project Transactions or Manage Project Billing Transactions.

<https://doc.workday.com/release-notes/en-us/finrev/8380733.html>

# Transfer Project Time Blocks within Closed Time Entry Periods, cont.

Transfer time blocks within closed time entry periods without triggering time calculations or retroactive payroll calculations to run

## What happens if I do nothing

- If you choose to do nothing, you won't be able to transfer time blocks within closed time entry periods. You'll see no change to project time blocks transferred in open time entry periods

## Additional considerations

- If time entry validations are triggered by the project transfer in a closed period, the validations prevent the project transfer from being completed
- If you reopen the period, and make changes to the transferred time block or other time blocks in the period, all time blocks, including the transferred time block, are picked up in the next retroactive time calculation for the period
- There is no change to the existing behavior of project transfers in open periods
- If there are retroactive payroll triggering events prior to the project transfer time block event, the project transfer occurs and recalculates payroll

<https://doc.workday.com/release-notes/en-us/finrev/8380733.html>

# Transfer Project Time Blocks within Closed Time Entry Periods demo

Enable transfers within closed time entry periods

## Set Up Project Billing Configuration

**Project Transfer Options**   Transfer Reasons   Revenue   Billing

▼ **Project Transfer Options**

Accounting Adjustment Date

Accounting Adjustment Reason

Transfer Reason Required

Allow Transfers Within Closed Time Entry Periods

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Transfer Project Time Blocks within Closed Time Entry Periods demo, cont.

Transfer time block within closed time entry period and review audit trail

Periods 62 Items

Period	Period Number	Period Start Date	Period End Date	Payroll Payment Date	Time Tracking			Pay On-Demand		Used In	
					Open Time Entry	Lock Time Entry	Unlock for Adjustments	Close Time Entry	Open Requests	Close Requests	Payroll
🔍	10	10/01/2024	10/31/2024	10/31/2024				01/01/2025 12:00 AM	10/01/2024	10/31/2024	

<input type="checkbox"/> Project Transaction	Phase	Task	Transfer to Project / Phase / Task	Split	Ineligible Reason	Transaction Memo	Transfer Reason	Accounting Adjustment Date	Accounting Adjust
<input checked="" type="checkbox"/> 2 Hours on 01/01/2021	Deploy	Deploy > 2021 On-going Support (01/01/2021 - 12/31/2021)	<ul style="list-style-type: none"> <li>IT Help Desk &gt; Implement &gt; Continue Training Support Teams (03/01/2020 - 12/31/2022)</li> </ul>			transfer internal project			

History 14 Items

Modified Moment	Person	Status	Quantity	Time Entry Code	Time Type	Comment	Time Block Comment
01/16/2025 04:49:48.271 PM		Updated	2	Project Time	Implement > Continue Training Support Teams (03/01/2020 - 12/31/2022)		transfer internal project
02/23/2021 11:16:34.795 AM		Not Required	2	Project Time	Deploy > 2021 On-going Support (01/01/2021 - 12/31/2021)		

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Project Phases and Tasks for Fixed Fee Customer Contract Lines

Add project phases and tasks on fixed fee project customer contract lines

## Reasons to consider this feature

- 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

## What do I need to do

- Enter project phases and tasks as needed on your fixed fee project customer contract lines
- Configure your percent complete configurations using the Manage Percent Complete Configurations report

<https://doc.workday.com/release-notes/en-us/finrev/8380750.html>

# Project Phases and Tasks for Fixed Fee Customer Contract Lines, cont.

Add project phases and tasks on fixed fee project customer contract lines

## What happens if I do nothing

- If you choose to do nothing, you can continue to enter billable projects on your fixed fee project customer contract lines

## Additional considerations

- Percent Complete Configuration
  - Estimated Budget Cost Factor is only related to the project level as a whole and therefore is not supported when phases/tasks are used on contract lines
- Review Percent Complete for Revenue
  - When the budget doesn't have the same level of, or less, granularity as the contract lines on the project, the calculated percent becomes zero
- Revenue Recognition Accounting
  - When there are multiple phases on a contract line, the revenue will book at the project level
  - When there are multiple tasks on a contract line, the revenue will book at the phase level (if there is one phase)

<https://doc.workday.com/release-notes/en-us/finrev/8380750.html>

# Project Phases and Tasks for Fixed Fee Customer Contract Lines demo

## Project phases and tasks on Fixed Fee contract lines

Contract Line Summary 4 items

Line	Line Number	Sales Item	Revenue Category	Bundle	Line Type	Billable Project	Phases	Tasks	Line Status	Line Amount	Billing Schedule
Q	4	Fixed Fee Services	Fixed Fee Services		Fixed Fee Project	Fixed Fee Phase and Task Granularity for % Complete by Cost	Transition		Active	10,000.00	Fixed Fee Phase and Task Granularity for % Complete by Cost Omni Consumer Products 11/01/2024 Spread Even
Q	3	Fixed Fee Services	Fixed Fee Services		Fixed Fee Project	Fixed Fee Phase and Task Granularity for % Complete by Cost	Acceptance	Acceptance > Final Acceptance (10/25/2025 - 10/31/2025) Acceptance > Warranty Period Support (08/17/2025 - 10/25/2025)	Active	70,000.00	Fixed Fee Phase and Task Granularity for % Complete by Cost Omni Consumer Products 11/01/2024 Spread Even
Q	2	Fixed Fee Services	Fixed Fee Services		Fixed Fee Project	Fixed Fee Phase and Task Granularity for % Complete by Cost	Define Structure Plan and Strategize		Active	10,000.00	Fixed Fee Phase and Task Granularity for % Complete by Cost Omni Consumer Products 11/01/2024 Spread Even
Q	1	Fixed Fee Services	Fixed Fee Services		Fixed Fee Project	Fixed Fee Phase and Task Granularity for % Complete by Cost	Implement	Implement > Conduct Testing (06/01/2029 - 06/02/2029)	Active	30,000.00	Fixed Fee Phase and Task Granularity for % Complete by Cost Omni Consumer Products 11/01/2024 Spread Even

**Fixed Fee contract lines defined at the Phase/Task level**

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Project Phases and Tasks for Fixed Fee Customer Contract Lines, cont.

Defining a cost percent complete method on a Fixed Fee contract line that has phases

**Create Revenue Recognition Schedule**

**Revenue Recognition Information**

Company \* [Redacted]

Customer \* [Redacted]

Currency \* USD

Schedule Type [Dropdown]

Schedule Description [Text Area]

Schedule On Hold

Milestones [Dropdown]

Revenue Schedule Total 0.00

Select All

Add Lines 1 Item

**Generate Installment Information**

Revenue Recognition Method \* [x] Percent Complete [Dropdown]

Frequency Monthly

Percent Complete Method \* [x] Cost [Dropdown]

Now able to use Cost Percent Complete method when using phases or tasks

Add	Line	Revenue Category	Line Company	Document	Header Company	Bill-To Customer	Currency	Billable Project	Phases	From Date	To Date	
<input checked="" type="checkbox"/>	4110 Fixed Fee Services (Line 2)	Fixed Fee Services	[Redacted]	4110: [Redacted] Consumer Products 11/01/2024	[Redacted]	[Redacted]	USD	Fixed Fee Phase and Task Granularity for % Complete by Cost	Define Structure Plan and Strategize			1

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Projects features at-a-glance

---

## Project Budgets - Time and Expense for Phase and Task

---

JIRA	FINPRJ-51045
Setup effort	Automatically available
Change impact	Budget revenue calculation will now incorporate project time and expense at the phase and task level

---

## Transfer Project Time Blocks within Closed Time Entry Periods

---

JIRA	FINREV-45794, TIME-55116
Setup effort	Setup required
Change impact	Time entries can be transferred to a closed period without triggering a retroactive payroll calculation

---

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

---

JIRA	FINREV-46678
Setup effort	Automatically available
Change impact	Will need to ensure budget is created at the same level of granularity as the associated contract lines so percent complete calculation will function appropriately

# Spend Management – Accounts Payable

# Presented by



Will Hiraldo

Manager, Consulting Services

# Ensure OCR Supplier Invoices Have Required Fields

Workday enables you to configure more fields to be required for touchless supplier invoices

## Reasons to consider this feature

- This feature ensures that you can configure required fields for your touchless supplier invoices before auto-submission, which helps to avoid delays where supplier invoices need to be reworked to be usable.
- New fields are listed below:
  - Approver.
  - **Control Total Amount.**
  - Document Link.
  - Document Memo.
  - External PO Number.
  - Reference Type.
  - Statutory Invoice Type.
  - **Supplier's Invoice Number.**
  - Supplier Document Received

## What do I need to do

- To set up this feature:
  - Navigate to Configure Optional Fields > Supplier Accounts > Supplier Invoice Event
  - Select the fields that you want to be required. See the release notes for Hide or Show Optional Fields on Supplier Invoices in the related links section to see what fields are supported
- If a scanned or emailed invoice that is eligible for auto-submission has a missing required field, Workday creates it as a draft invoice and doesn't automatically submit it to the business process

<https://doc.workday.com/release-notes/en-us/finsa/8747592.html>

# Ensure OCR Supplier Invoices Have Required Fields, cont.

Workday enables you to configure more fields to be required for touchless supplier invoices

## What happens if I do nothing

- If you don't set up this feature, you can't use it

## Additional considerations

- Customer requirements.
  - Whether or not OCR is in scope.
- Supplier Invoice and Supplier Invoice Request tasks and BP routing.

<https://doc.workday.com/release-notes/en-us/finsa/8747592.html>

# Ensure OCR Supplier Invoices Have Required Fields demo

## Configure optional fields

### Configure Optional Fields by Task

Process Supplier Invoice Event

6 items

⊕	*Field	*Criteria	Enforce Required in Web Services	Hidden For	Required For
⊖	× Invoice Line Billing End Date 	× Hide For All 	<input type="checkbox"/>		
⊖	× Invoice Billing Start Date 	× Hide For All 	<input type="checkbox"/>		
⊖	× Invoice Billing End Date 	× Hide For All 	<input type="checkbox"/>		
⊖	× Invoice Delivery Date 	× Hide For All 	<input type="checkbox"/>		
⊖	× Invoice Line Delivery Date 	× Hide For All 	<input type="checkbox"/>		
⊖	× Invoice Line Billing Start Date 	× Hide For All 	<input type="checkbox"/>		

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Supplier Accounts Hub Enhancements

With this release, Workday delivers additional features to the Supplier Accounts Hub.

## Reasons to consider this feature

- More robust dashboard compared to the Invoice Workbench.
- These enhancement improve your user experience in the hub, which consolidates commonly-used tasks and reports for your Accounts Payable organization.

## What do I need to do

- Automatically Available

<https://doc.workday.com/release-notes/en-us/sminv/8402593.html>

# Supplier Accounts Hub Enhancements

With this release, Workday delivers additional features to the Supplier Accounts Hub.

## What happens if I do nothing

- Automatically Available

## Additional considerations

- If not already completed, configure domain security to access the Supplier Account Hub. See the 2024R2 Release Note link in the Related Information section.
  - [Supplier Accounts Hub](#)

<https://doc.workday.com/release-notes/en-us/finsa/8747592.html>

# Supplier Accounts Hub Enhancements

## Supplier Accounts Hub

**Supplier Accounts Hub** |←

- Overview
- Work Area Overview
- My Work Queue
- Upload and Scan
- Email Ingestion
- Processor Metrics
- Manager Metrics
- Team Metrics
- Process Metrics
- Invoice Cycle Times
- Work Area Manager Ove...
- Find...
- Suggested Links
  - Supplier Invoice Workbe...
  - Create Supplier Invoice
  - Create Supplier Invoice ...

### Supplier Invoice Work Area Overview

Totals for Work Area

Scanning  
**0**

Error  
**0**

Pending Submission  
**256**

Pending Approval  
**28**

Priority for Work Queue

Past Due Invoices 102

2 items

Work Queue Tag	Count
High Priority (priority)	5
PO	9

Exceptions for Work Queue

Scanning Queue Exceptions 0 items

Severity	Validation	Message	Count
No items available.			

Work Queue OCR Exceptions 0 items

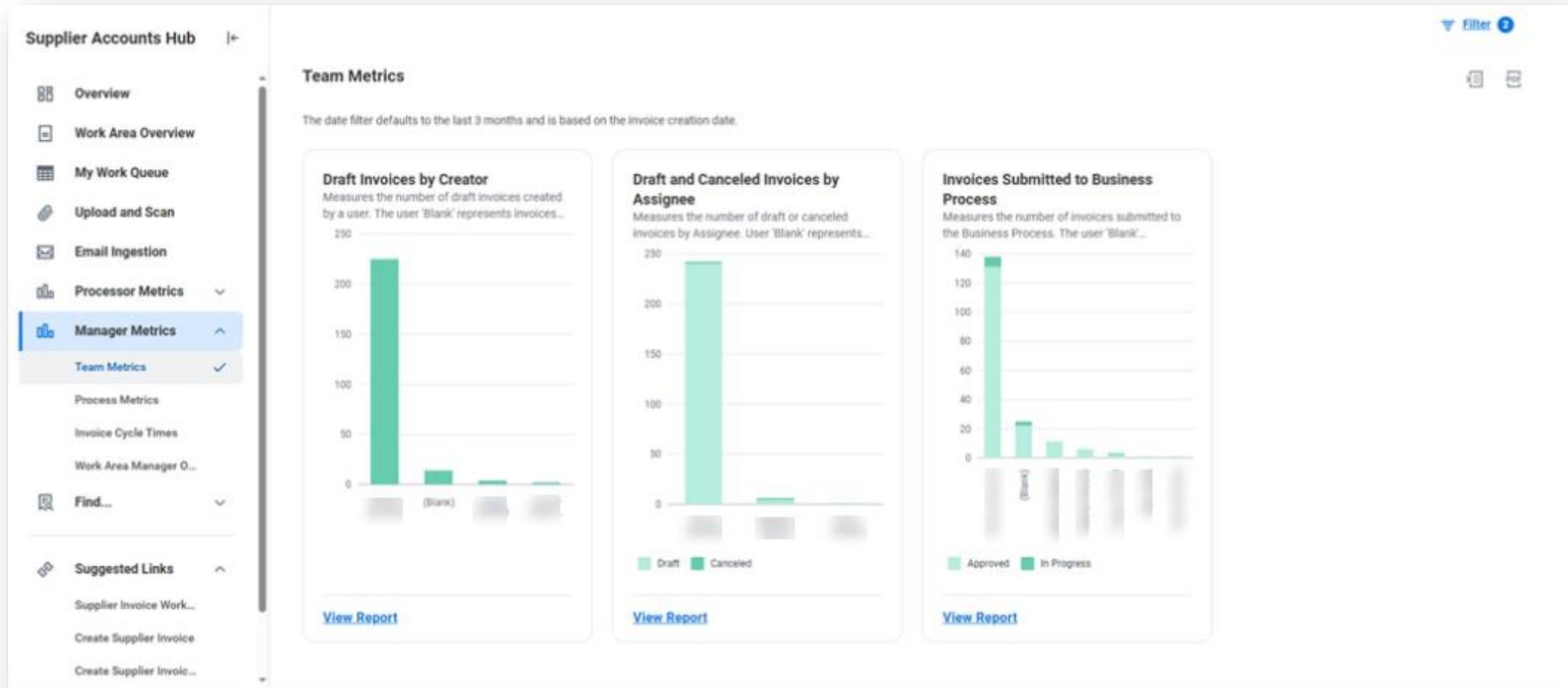
Severity	Validation	Message	Count
No items available.			

Work Queue Invoice Exceptions 2 items

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Supplier Accounts Hub Enhancements

## Supplier Accounts Hub



Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Supplier Accounts Hub Enhancements

## Supplier Accounts Hub

### Filters

[Reset Filter](#)

---

**Company**

**Supplier**

**Supplier Category**

**Supplier Group**

**Assignee**

**Filter based on**

**Date On or After**

Cancel OK

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# AP features at-a-glance

---

## Ensure OCR Supplier Invoices Have Required Fields

---

JIRA	FINSA-42703
Setup effort	Setup required
Change impact	Can configure more fields to be required for OCR Supplier Invoices, including Supplier Invoices and Supplier Invoice Requests

---

---

## Supplier Accounts Hub Enhancements

---

JIRA	FINSA-40899
Setup effort	Automatically available
Change impact	Improves user experience in the hub, consolidates commonly-used tasks and reports for your Accounts Payable organization

---

# Spend Management - Inventory

# Ability to Restrict Access to Ad Hoc Inventory Put Aways

Workday delivers the ability to restrict access to ad hoc inventory put away transactions to ensure that task users have the necessary awareness of item costs and worktags included on these transactions

## Reasons to consider this feature

- This ensures that users with the necessary knowledge of item costs and applicable worktags have access to the appropriate put away task, enabling better control of inventory put away transactions, inventory value, and reliable accounting entries

## What do I need to do

- Review the business process for Inventory Put-Away Event and confirm security access to the new ad hoc task. Workday performs a conversion to copy the Put Away Inventory initiating action to the new Ad Hoc Inventory Put Away task

<https://doc.workday.com/release-notes/en-us/sminv/8402593.html>

# Ability to Restrict Access to Ad Hoc Inventory Put Aways

Workday delivers the ability to restrict access to ad hoc inventory put away transactions to ensure that task users have the necessary awareness of item costs and worktags included on these transactions

## What happens if I do nothing

- Automatically Available

## Additional considerations

- New ***Ad Hoc Inventory Put Away task***
- Removal the *Ad Hoc Put-Away* option from the Put Away Inventory task
- Reporting
  - Put Away Transaction Origin
- Security
  - BP
  - Domains

<https://doc.workday.com/release-notes/en-us/finsa/8747592.html>

# Wave Picking

Workday provides the ability to gather a group of pick lists together within an inventory site.

## Reasons to consider this feature

- This ensures that users with the necessary knowledge of item costs and applicable worktags have access to the appropriate put away task, enabling better control of inventory put away transactions, inventory value, and reliable accounting entries

## What do I need to do

- Setup Required
  - On the Maintain Inventory Site task:
    - Select the Use Directed Picking option to display all the options,
    - Select Enable Wave Picking.
  - Sequence generator for Inventory Waves
  - Create a custom report using the new Inventory Wave data source and Inventory Wave filter to easily find waves and their status

<https://doc.workday.com/release-notes/en-us/sminv/8402593.html>

# Wave Picking

Workday provides the ability to gather a group of pick lists together within an inventory site.

## What happens if I do nothing

- There is no impact.

## Additional considerations

- Optional - Review your pick list print layout and update to add wave picking.
- Updates to Inventory Operations dashboard may be needed.

<https://doc.workday.com/release-notes/en-us/finsa/8747592.html>

# Wave Picking

## Maintain Inventory Site task

### Directed Pick Inventory Options

Enable Wave Picking	<input type="checkbox"/>
Print Picking List in Location Sort Order	<input checked="" type="checkbox"/>
Allow Quick Pick at Line Level	<input checked="" type="checkbox"/>
Require Item Confirmation on Mobile	<input type="checkbox"/>
Require Location Confirmation on Mobile	<input type="checkbox"/>
Fully Pick	<input checked="" type="checkbox"/>
Automatic Unit of Measure Conversion	<input type="text" value="× Break Down then Build Up"/> 

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Mass Cancel Framework for Inventory Documents

Workday now enables you to take mass action to cancel inventory transaction business documents in Workday, based on your specified criteria.

## Reasons to consider this feature

- Workday now provides a good way to quickly discover, and act upon inventory transaction business documents from at a high volume, helping users easily clean up their unwanted data.

## What do I need to do

- Create a segment security group with access to the new Mass Cancel Inventory Document security segment.
- Add the new security group of users to the Mass Operation Management domain.

<https://doc.workday.com/release-notes/en-us/sminv/8402593.html>

# Mass Cancel Framework for Inventory Documents

Workday now enables you to take mass action to cancel inventory transaction business documents in Workday, based on your specified criteria.

## What happens if I do nothing

- There is no impact.

## Additional considerations

- Create a custom report with filters for the respective document types.
- When performing task, Workday recommends you do not use filters for the current day

<https://doc.workday.com/release-notes/en-us/finsa/8747592.html>

# Inventory features at-a-glance

---

## Ability to Restrict Access to Ad Hoc Inventory Put Aways

---

JIRA	SMINV-16877
Setup effort	Automatically available
Change impact	Ensures that users with the necessary knowledge of item costs and applicable worktags have access to the appropriate put away task

---

---

## Wave Picking

---

JIRA	SMINV-27367
Setup effort	Setup required
Change impact	Enables users the ability to group picking lists to better organize and prioritize inventory picking process, increasing overall efficiency

---

---

## Mass Cancel Framework for Inventory Documents

---

JIRA	SMINV-25470
Setup effort	Setup required
Change impact	Provide a way to quickly discover, and act upon inventory transaction business documents at a high volume, helping users easily clean up their unwanted data

---

# Spend Management - Procurement

# Manufacturer & Manufacturer Part Number as Primary Attributes for Purchase Items

Workday delivers the ability to display an item's manufacturer and manufacturer part numbers as primary attributes on a purchase item's header information, instead of in its alternate Item identifier information.

## Reasons to consider this feature

- Improves the usability and functionality of the Manufacturer and Manufacturer Part Number fields on the purchase item.
- Making these fields unique primary item attributes, we better enable search functionalities and enhance visibility within the item and in reporting.

## What do I need to do

- Access the Maintain Item Identifier Display Options task:
  - Configure the Item Management Display Options to include Manufacturer and Manufacturer Part Number.

# Manufacturer & Manufacturer Part Number as Primary Attributes for Purchase Items

Workday delivers the ability to display an item's manufacturer and manufacturer part numbers as primary attributes on a purchase item's header information, instead of in its alternate Item identifier information.

## What happens if I do nothing

- There is no impact.

## Additional considerations

- Customer Requirement
  - Do they use Workday's Internal Catalog functionality.
- Review reports
  - Consider building custom reports to pull these fields to their own column.
- You can only configure one manufacturer and manufacturer part number per item.
- Workday displays and alert validation for multiple part numbers.

<https://doc.workday.com/release-notes/en-us/finsa/8747592.html>

# Manufacturer & Manufacturer Part Number as Primary Attributes for Purchase Items

## Purchase Item Report

### Edit Purchase Item Catering Services

Item Requester (empty)	Company (empty)		
Item Name	*	<input type="text" value="Catering Services"/>	Commodity Code <input type="text"/>
Item Identifier		<input type="text" value="10008"/>	Spend Category * <input type="text" value="X Trades Shows &amp; Events"/>
Item Description		<input type="text" value="Catering Services for Events"/>	Purchase Item Group <input type="text" value="X Events"/>
Manufacturer Part Number		<input type="text"/>	Item Status * <input type="text" value="X Active"/>
Manufacturer		<input type="text"/>	

[Item Overview](#) [Alternate Item Identifiers](#) [Related Worktags](#) [Supplier Information](#) [Inventory Site Options](#) [Item Substitutes](#)

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Display All Names for Requisitions Awaiting Action by Multiple Users in the Requisitions Worklet

Workday enables you to view the names of all users for requisitions awaiting action by more than one user.

## Reasons to consider this feature

- This enhancement improves the efficiency of your requisitioning process.

## What do I need to do

- This feature is automatically available, and no configuration is needed

# Display All Names for Requisitions Awaiting Action by Multiple Users in the Requisitions Worklet

Workday enables you to view the names of all users for requisitions awaiting action by more than one user.

## What happens if I do nothing

- Automatically Available

## Additional considerations

- Operational Impacts

# Display All Names for Requisitions Awaiting Action by Multiple Users in the Requisitions Worklet

## Requisition Worklet

The screenshot displays the 'Requisition Process History' interface. On the left is a sidebar with a 'Process' menu containing five 'Requisition Event' items. The main content area is titled 'Requisitions (Past 6 Months)' and includes a progress bar for 'Open (32)' and 'Completed (2)'. A requisition card for 'REQ-7309' is shown with details: 'Total Amount: \$500.00', 'Created on 02/20/2025', and '1 item'. The card also features 'Awaiting Action - Show Details' and 'Ordering', 'Receiving', 'Invoicing' buttons. An 'Edit Filters' button is visible. On the right, a table is partially visible with the following data:

All Persons	Comment
1	
0	
0	
0	
1	

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Lot and Serial for Consignment Requisitions and Purchase Orders

Workday enables you to specify and update lot and serial information directly on consignment requisitions and purchase orders.

## Reasons to consider this feature

- Add and edit lot and serial information directly on consignment procurement transactions instead of using other fields

## What do I need to do

- Create new requisition and purchase order types in to include the new lot and serial type for relevant consignment requisitions and purchase orders

<https://doc.workday.com/release-notes/en-us/sminv/8402593.html>

# Lot and Serial for Consignment Requisitions and Purchase Orders

Workday enables you to specify and update lot and serial information directly on consignment requisitions and purchase orders.

## What happens if I do nothing

- You can continue to use instance-based lot and serial numbers added during put away. Your bill-only requisitions and purchase orders will continue to have ad hoc lot and serial number fields.

## Additional considerations

- Healthcare Industry impacts
- EDI 850
- Inactivating old "Bill Only" and "Bill and Replace" requisition and purchase order types when you configure your new types.
- Update Web Service template to 44.1

<https://doc.workday.com/release-notes/en-us/sminv/8402593.html>

# Lot and Serial for Consignment Requisitions and Purchase Orders

## Requisition Worklet

Goods

1 item

*Spend Category	*Quantity	Unit Cost	Extended Amount	Lot and Serial	Deliver-To	*Ship-To Address	Ship-To Contact
Stocked Office Supplies	Quantity * 1	Unit Cost 955.299051	955.30	Lot Number  Serial Number	× First Aid Storage	× 3939 The Embarcadero San Francisco, CA 94111 United States of America	×
	Unit of Measure * × Pallet	No Charge <input type="checkbox"/>					

Attachments

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Procurement features at-a-glance

---

## Manufacturer & Manufacturer Part Number as Primary Attributes for Purchase Items

---

JIRA	SMINV-25726
Setup effort	Setup required
Change impact	Making these fields unique primary item attributes, we better enable search functionalities and enhance visibility within the item and in reporting

---

---

## Display All Names for Requisitions Awaiting Action by Multiple Users in the Requisitions Worklet

---

JIRA	SMREQ-2455
Setup effort	Automatically available
Change impact	Improves overall efficiency of the requisitioning process

---

---

## Lot and Serial for Consignment Requisitions and Purchase Orders

---

JIRA	SMORDER-70941
Setup effort	Setup required
Change impact	Adding and editing lot and serial information directly on consignment procurement transactions instead of using other fields also reduces user error and increases visibility of key information

---

# Adaptive

# Presented by



Tiffany McLaurin

Manager CVS Consulting  
Services

# Version-Specific Overrides for Linked Accounts

Workday now provides options in the account settings to enable linked accounts for data entry in specific plan versions.

## Reasons to consider this feature

- Provides override links for specific versions, providing greater flexibility for planning, even in mature tenants.
- Great for implementations when loading historical plan versions; can reduce the need for additional planning sheets.
- May assist with streamlining the number of sheets used in the tenant, leading to greater tenant health with less effort.
- Will allow administrators to be able to adjust planning methodologies more easily than ever before.

## What do I need to do

- This feature is automatically available.
- To use, click the check box for Override links for each specific version.

[\[!Version-Specific Overrides for Linked Accounts](#)

# Version-Specific Overrides for Linked Accounts demo

Steps to add a version-specific override for a linked account.

## Click Override link for specific versions

**Links to**  
Capital.Net\_Book\_Value

Add Edit Delete

Change sign +/-

**Apply Dimension Value**  
None

**Linked filters**  
None

**Override link for specific versions**

**Time rollup**  
Sum of rolled-up values

**Level/Dimension rollup**  
Sum of rolled-up values

Actuals overlay

Enable actuals for link  
(Specify Default Formulas)

Show actuals if linked account has them

## Then select the Link Version Selector and the Override Link Setting

**Links to**  
Capital.Net\_Book\_Value

Add Edit Delete

Change sign +/-

**Apply Dimension Value**  
None

**Linked filters**  
None

**Override link for specific versions**

**Link Version Selector**  
Forecast

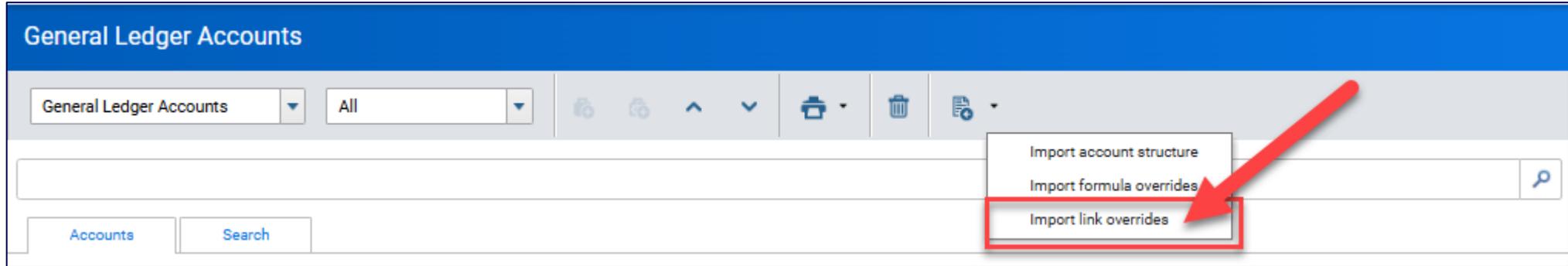
**Override Link Setting**  
Data Entry

**Level/Dimension rollup**  
Sum of rolled-up values

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Version-Specific Overrides for Linked Accounts demo

Import link overrides selection is available from the Import Account Structure icon.



Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Introducing Shared Scenarios

Workday now enables users to share personal scenarios with other collaborators.

## Reasons to consider this feature

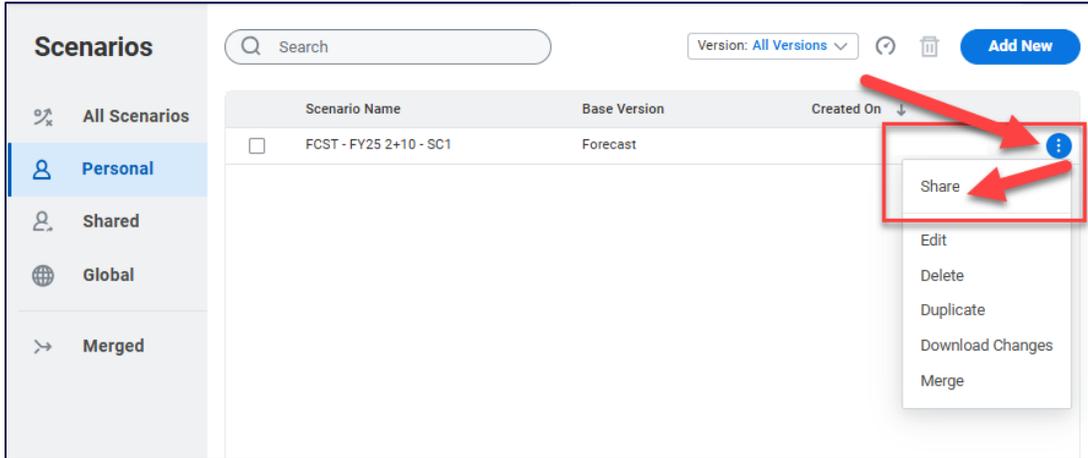
- Shared scenarios improve collaboration, providing more visibility and input from stakeholders.
- This feature makes it easy for non-administrators to create and share versions, without the need to engage their administrator.
- Is easy to use while in the moment; Sharing can be done in just a few clicks.

## What do I need to do

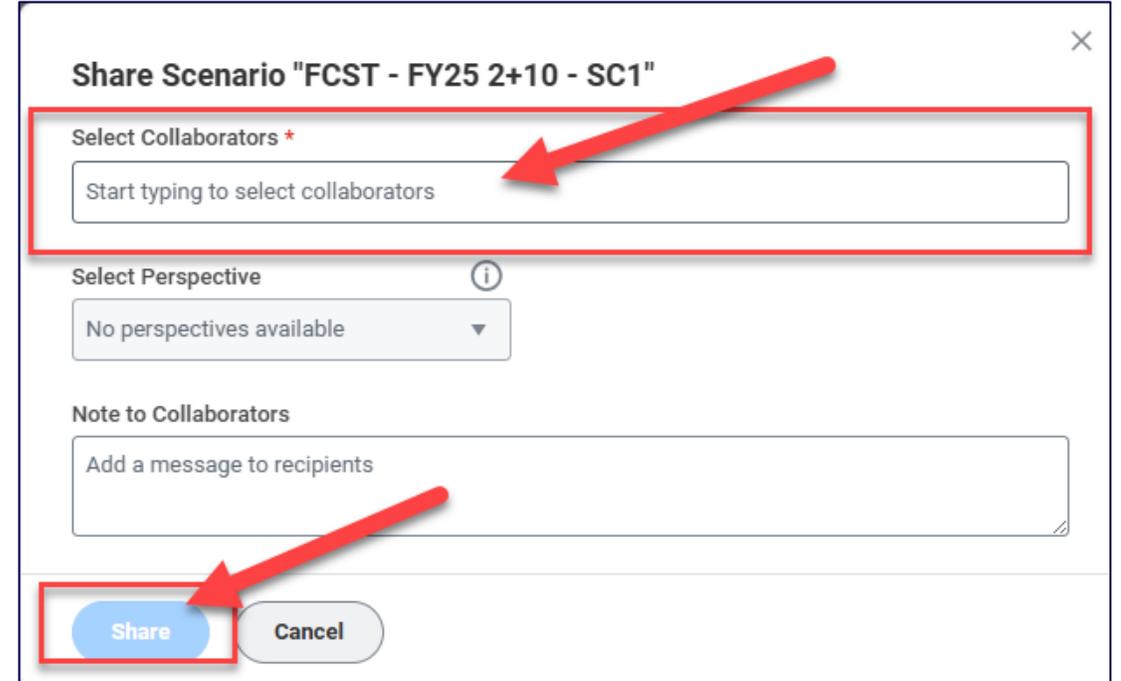
- Workday automatically adds the *Share Scenarios* permission to any permission set with an active *Manage Scenarios* permission.
- For future changes, select Share Scenarios on each applicable permission set. If Share Scenarios is disabled, select Create Scenarios to enable.
- For those administrators that manage Adaptive Planning security through Workday Core, you must manually enable the *Share Scenarios* action for Action Groups.

# Introducing Shared Scenarios demo

## How to Share a Scenario.



## How to add Collaborators to a Scenario.



Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Adaptive Planning Notifications

With this release, Workday will now display the notifications icon and page to all users.

## Reasons to consider this feature

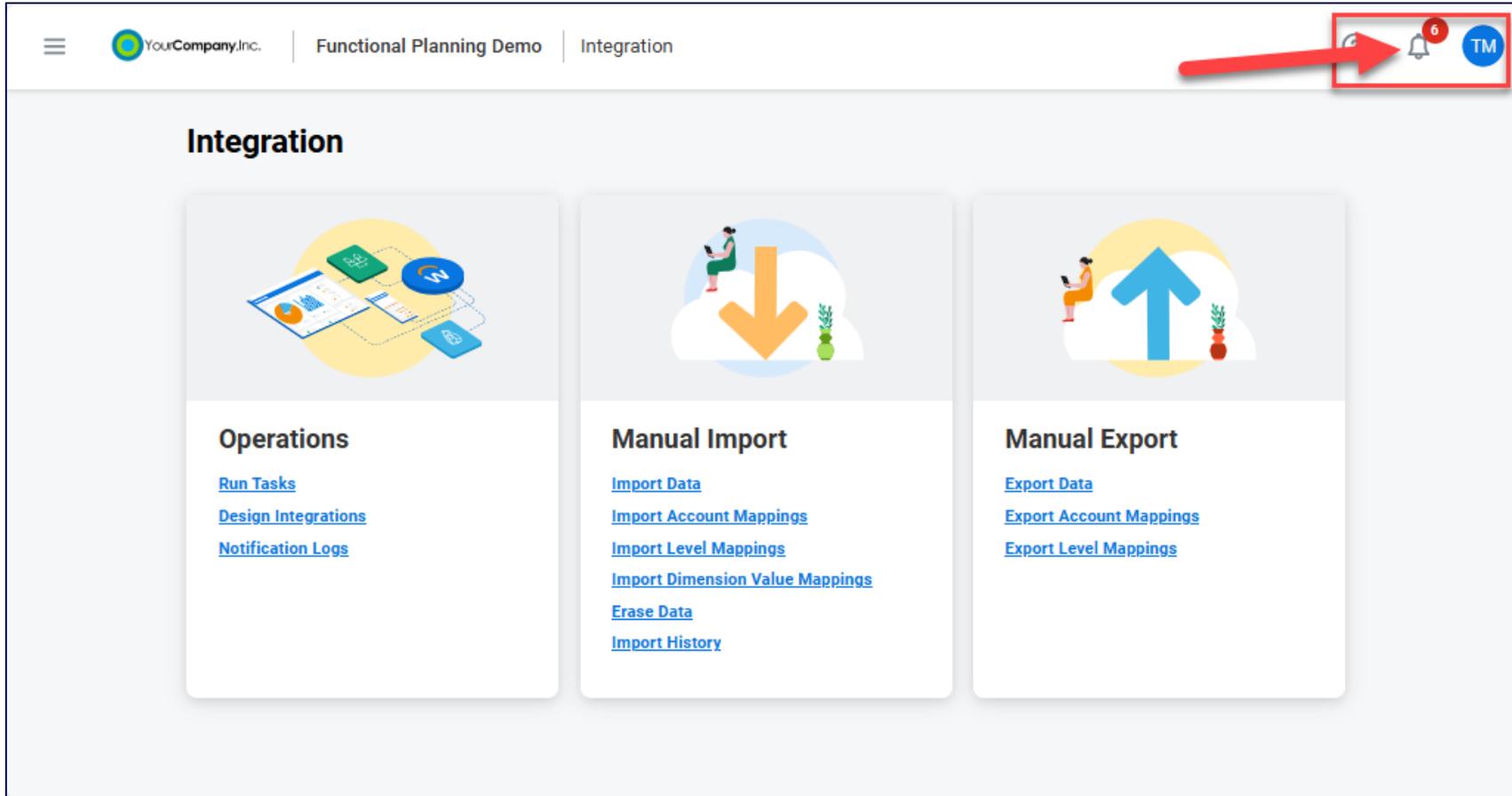
- Not just for integration logs any longer.
- Notifications will provide an enhanced user experience with a visual notification for when scenarios are shared without needing to navigate away from Adaptive Planning.
- Notifications will provide more visibility and input from stakeholders.
  - When a new Shared Scenario is made available
  - Scheduled tasks are due
  - Integration logs

## What do I need to do

- This feature is automatically available.
- A notification icon and notification page will be available to all users.

# Adaptive Planning Notifications demo

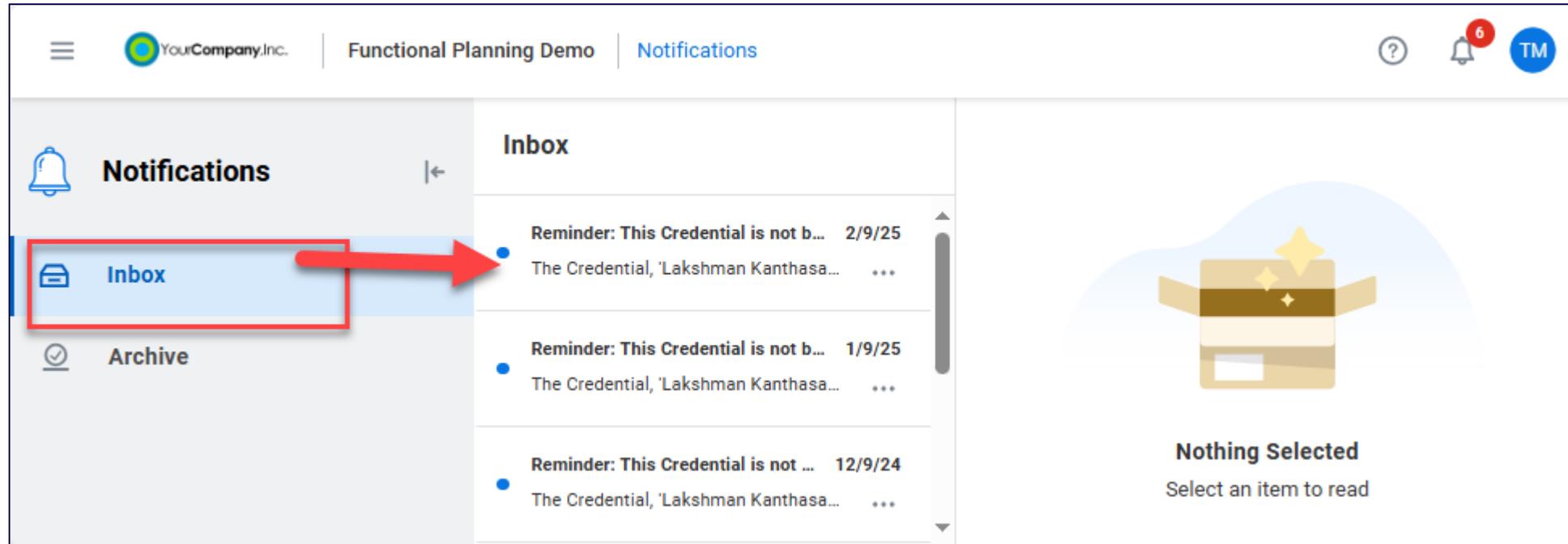
## Where to find Notifications



Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Adaptive Planning Notifications demo

## View of User Notifications Screen



Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Perspective Favorites in Dashboards

With this release, Workday enables users to favorite perspectives.

## Reasons to consider this feature

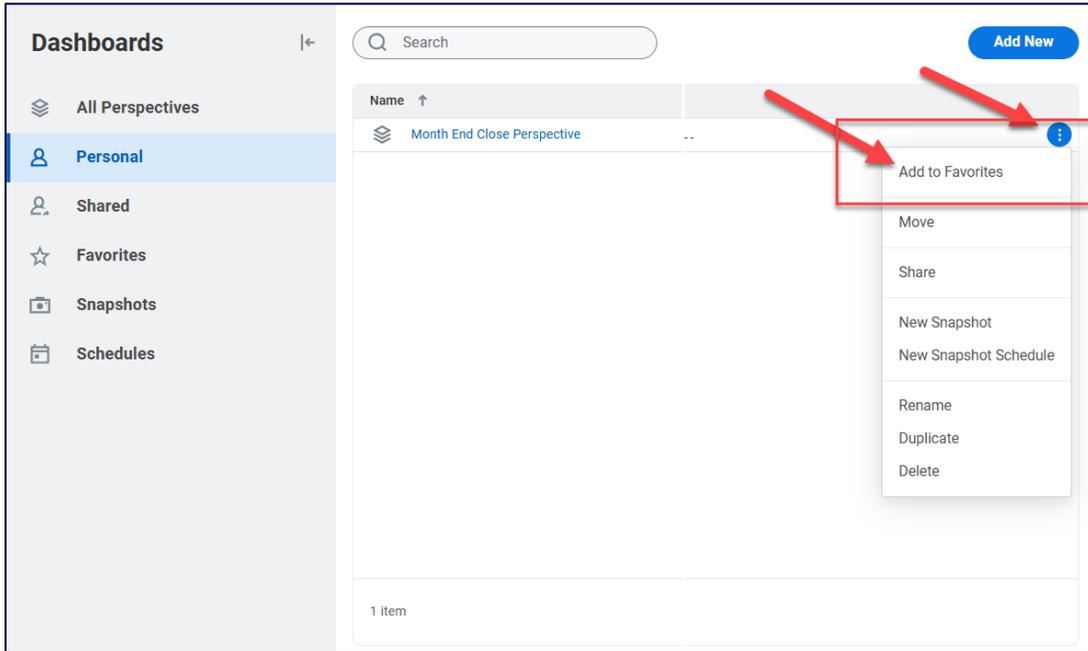
- Introducing favorites for perspectives helps users locate the perspectives they reference most frequently.
- Favorites are user specific and are not visible to other users.
- For each Perspective that has been marked as a favorite, it will then be listed under the user's Dashboard menu, providing quick access.

## What do I need to do

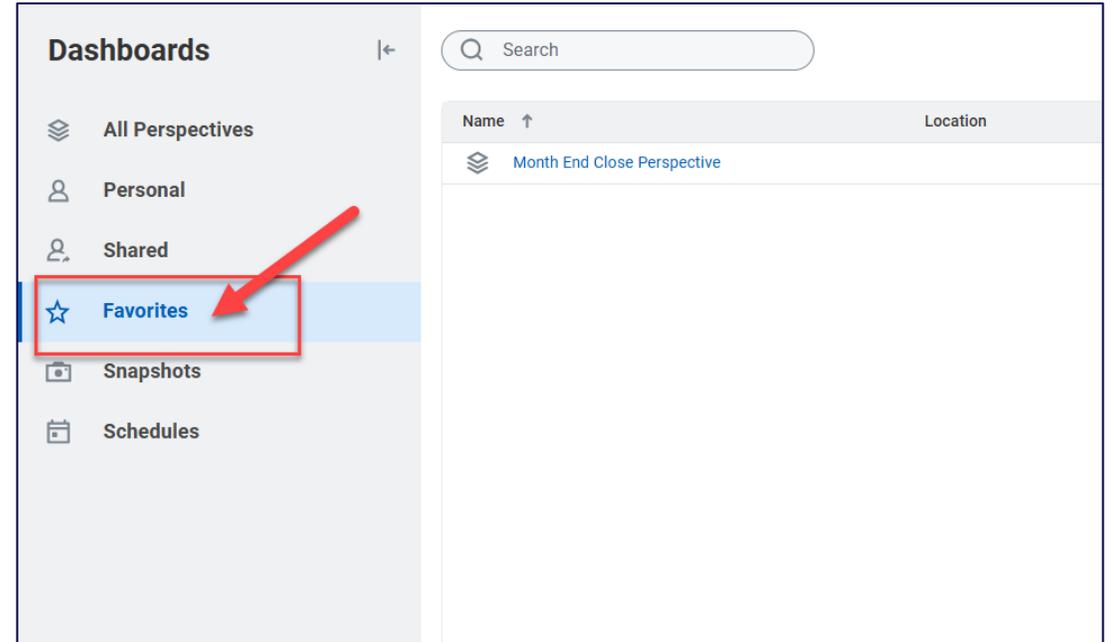
- This feature is automatically available.
- Add favorites, as needed, from the Perspectives screen of Dashboards.

# Perspective Favorites in Dashboards demo

## How to Add a Perspective to Favorites.



## How to Find Favorites.



Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Perspective Folders in Dashboards

With this release, Workday enables folders to manage dashboard perspectives

## Reasons to consider this feature

- Introducing folders for perspectives adds more ways to organize your perspectives.

## What do I need to do

- This feature is automatically available.
- Add folders, as needed, from the Perspectives screen of Dashboards.

[\[Perspective Folders in Dashboards\]](#)

# Perspective Folders in Dashboards demo

## How to Create a Folder in a Dashboard

The screenshot shows the 'Dashboards' interface. On the left is a sidebar with navigation options: All Perspectives (selected), Personal, Shared, Favorites, Snapshots, and Schedules. The main area features a search bar and a table. The table has columns for Name, Location, Status, Created By, and Created. A red arrow points from the 'Created' column of the first row to a dropdown menu. The dropdown menu contains an 'Add New' button and two options: 'Perspective' and 'Folder'.

Name ↑	Location	Status	Created By	Created
Month End Close Perspective	Personal		Tiffany McLaurin	February

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Perspective Folders in Dashboards demo

## How to Identify Perspective Folders

The screenshot shows the 'Dashboards' interface with a sidebar on the left containing navigation options: All Perspectives, Personal, Shared, Favorites, Snapshots, and Schedules. The main area displays a table of perspective folders. A red box highlights the first row, 'Month End Close Folder', and a red arrow points to its folder icon. The table has columns for Name, Location, Status, Created By, and Created Date.

Name	Location	Status	Created By	Created Date
Month End Close Folder			Tiffany McLaurin	
Month End Close Perspective			Tiffany McLaurin	

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Add Reports on Dashboards

Workday enables users to add existing shared matrix reports on a dashboard alongside related charts and sheets.

## Reasons to consider this feature

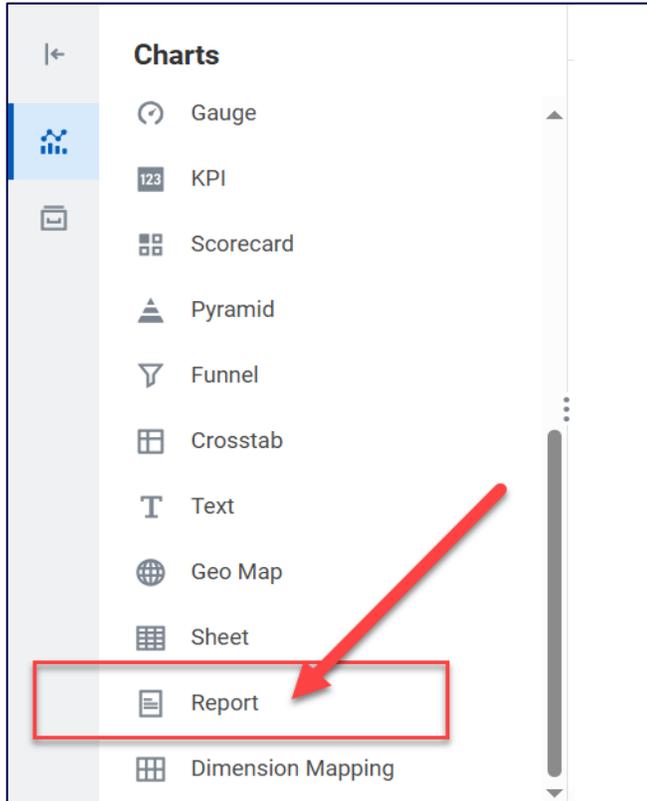
- Makes dashboards a one-stop-shop for users.
  - Simplify existing Process Tasks by including shared reports on dashboards.
  - Rethink your month-end-close analysis process. Dashboards can now have reports with a text field to capture notes.

## What do I need to do

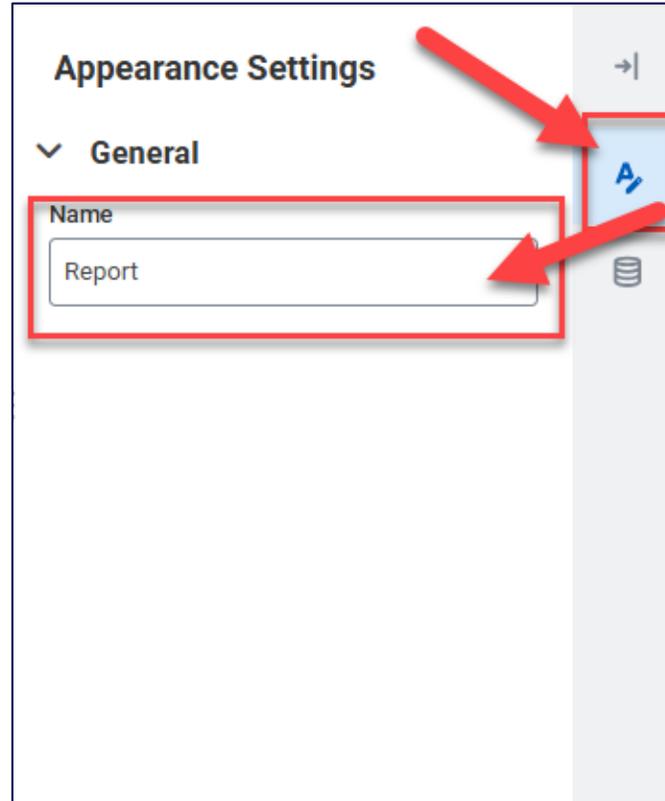
- This feature is automatically available.
- To add a report to a dashboard, *Access Reports* and *Edit Dashboards* should be selected on each applicable permission set. If *Edit Dashboards* is disabled, select *Access Dashboards* to enable.

# Add Reports on Dashboards demo

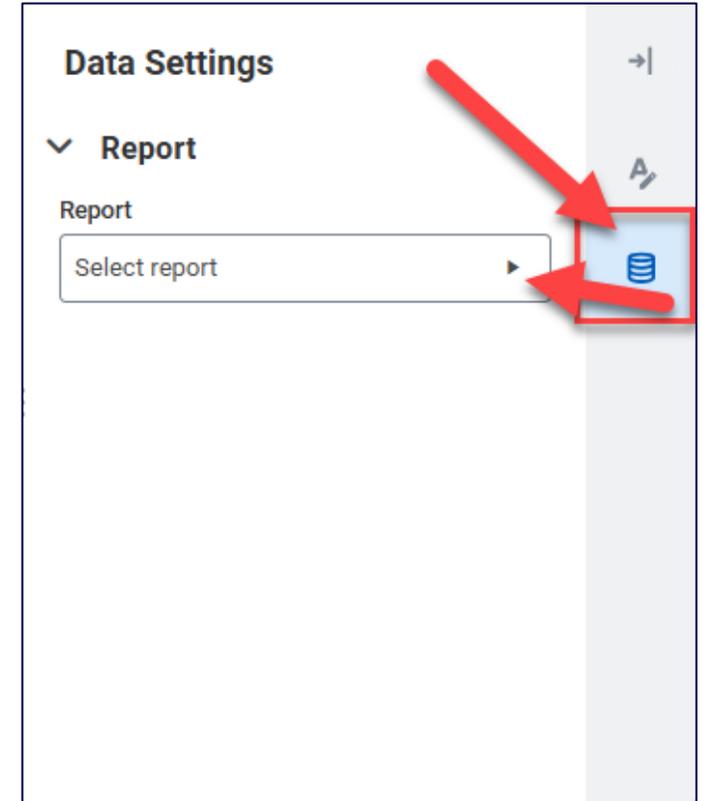
Drag and Drop Report chart to your Dashboard.



Name the report as it will be displayed on the Dashboard.



Select an existing report and view.



# Adaptive features at-a-glance

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## Version-Specific Overrides for Linked Accounts

---

JIRA	PLNMOD-10112
Setup effort	Automatically available
Change impact	The ability to override links for specific versions provides flexibility in the model. With these options you can leverage the links for certain versions when it suits your business needs.

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## Introducing Shared Scenarios

---

JIRA	PLNSHEET-7689, PLNMOD-10273, PLNSECENG-4870, PLNMOD-11311, PLNEVAL-5770
Setup effort	Setup required
Change impact	Shared scenarios improve collaboration, providing more visibility and input from stakeholders. This improves accuracy in your budgets and plans, and saves time.

---

---

## Adaptive Planning Notifications

---

JIRA	PLNDASH-19336
Setup effort	Automatically available
Change impact	Notifications help you to know when scenarios are shared without needing to navigate away from Adaptive Planning.

---

# Adaptive features at-a-glance

---

## Perspective Folders in Dashboards

JIRA PLNDASH-19685

Setup effort Automatically available

Change impact Introducing folders for perspectives adds more ways to organize your perspectives.

---

## Perspective Favorites in Dashboards

JIRA PLNDASH-19478

Setup effort Automatically available

Change impact Introducing favorites for perspectives helps you locate the perspectives you care about most.

---

## Add Reports on Dashboards

JIRA PLNRPT-9986

Setup effort Automatically available

Change impact Enhance the user experience of Dashboards by adding reports to view alongside related charts and sheets.

# Next steps



**Reminder:** This content along with the Q&A will be made available to you after the webinar



**Reminder:** We value your feedback; please complete the post-webinar survey

Contact your **Cognizant Engagement Manager** for additional support with:



**Managing the release**



**Building or updating your strategic roadmap**



**User adoption and change management**

# Thank you

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