HR Path.

Your way to people success

Workday Release 2023 R1

Integration & Administration

2023

List of selected 2023 R1 new functionalities in Integration and Administration

1. Expense Protect Identifies Duplicate Expenses
2. Journal Line Anomaly Based on Amounts
3. Workday Messaging for Canada
4. Send Emails From Multiple From Addresses
5. Goals API and Reporting
6. Bulk Import for Change Benefits Web Service

© 2023 HR Path

SAFE HARBOR STATEMENT

This presentation may contain forward looking statements for which there are risks, uncertainties and assumptions. If risks materialize or assumptions prove incorrect, Workday's business results could differ from the results implied in this presentation.

Any unreleased services, features or enhancements that are not currently available are subject to change at Workday's discretion.

© 2023 HR Path

OPT-IN OR AUTOMATICALLY AVAILABLE

- Set up required/Opt-in
- Automatically Available

© 2023 HR Path

RELEASE WORKDAY 2023 R1

INTEGRATION/ADMIN

C1 - INTERNAL

© 2023 HR Path

1 . Expense Protect Identifies Duplicate Expenses

Feature Description

With this release Workday delivers enhancements to Expense Protect functionality by leveraging machine learning to detect duplicate expenses against paid expenses.

When users submit expenses, Expense Protect evaluates them and identifies potential duplicate expenses and provides a risk level and risk insight.

This helps expense partners to quickly and easily identify duplicate expenses without having to manually review every expense report, speeding up review process and reimbursement.

To Do:

1. This feature is automatically available if you have Expense Protect currently enabled in your tenant.

© 2023 HR Path

Step 1

1

WN demo
Stop In: 6:29

Maintain Expense Risk Level Configuration

Risk scores represent the likelihood that an expense line deserves further investigation. Example: A risk score of 90 means that 90% of similar expense report lines are lower risk.

Default Risk Level Configuration

3 items

Risk Insight Type	Risk Level	Risk Score Greater Than	*Risk Score Less Than or Equal To
Incorrect Expense item			
	Low	0	80
	Medium	80	90
	High	90	100
Amount Anomaly			
	Low	0	80
	Medium	80	90
	High	90	100
Duplicate Expense			
	Low	0	30
	Medium	30	60
	High	60	100

Risk Level Configurations 2 items

Order	*Company/Company Hierarchy	*Risk Insight Type

OK Cancel

500 1 Global Modern Services, Inc. (USA) - 2501$21

© 2023 HR Path

Step 2

Risk Level Configurations 2 items

Order	*Company/Company Hierarchy	*Risk Insight Type	Risk Level	Risk Score Greater Than	*Risk Score Less Than or Equal To
	500.1 Global Modern Services, Inc. (USA)	Amount Anomaly			
			Low	0	85
			Medium	85	95
			High	95	100
	500.1 Global Modern Services, Inc. (USA)	Duplicate Expense			
			Low	0	50
			Medium	50	80
			High	80	100

© 2023 HR Path

Step 3

Expense Report Work Area

Search

Expense Reports 13 items

Expense Report	Action	Risk Level	Risk Insights	Status	Number of Days in Queue	Sent Back Earlier	Company	Expense Payee	Has Corpo Card
EXP-00004469	Review	High	Amount Anomaly Duplicate Expense	Waiting on Expense Partner	4	No	500.1 Global Modern Services, Inc. (USA)	Employee: Logan McNeil (CHRO, HRExe, Mgr 4000, MatMgr, ProMgr,TalMgr,VPRept)	Yes
EXP-00004468	Review	High	Duplicate Expense Incorrect Expense item	Waiting on Expense Partner	4	No	500.4 Global Modern Services, (PS USA)	Employee: Oliver Reynolds (CIO, Mgr 5000)	Yes
EXP-00004470	Review	High	Duplicate Expense Incorrect Expense item	Waiting on Expense Partner	4	No	500.1 Global Modern Services, Inc. (USA)	Employee: Steve Morgan (CEO, Mgr 1000, 2000, 3000, 3500, 3600, CCM 1000, Team Leader)	Yes
EXP-00004466	Review	High	Amount Anomaly Duplicate Expense	Waiting on Expense Partner	4	No	500.1 Global Modern Services, Inc. (USA)	Employee: Oliver Reynolds (CIO, Mgr 5000)	Yes

© 2023 HR Path

Step 4

Review Expense Report EXP-00004469

Pay To
Employee: Logan McNeil (CHRO, HRExe, Mgr 4000, MatMgr, ProMgr,TalMgr,VPRept)

Total
15,720.05 USD

Status	Personal	Company Paid	Cash Advance Applied	Reimbursement
Waiting on Expense Partner	0.00 USD	15,206.05 USD	0.00 USD	514.00 USD

Header | Attachments | **Expense Lines**

Add

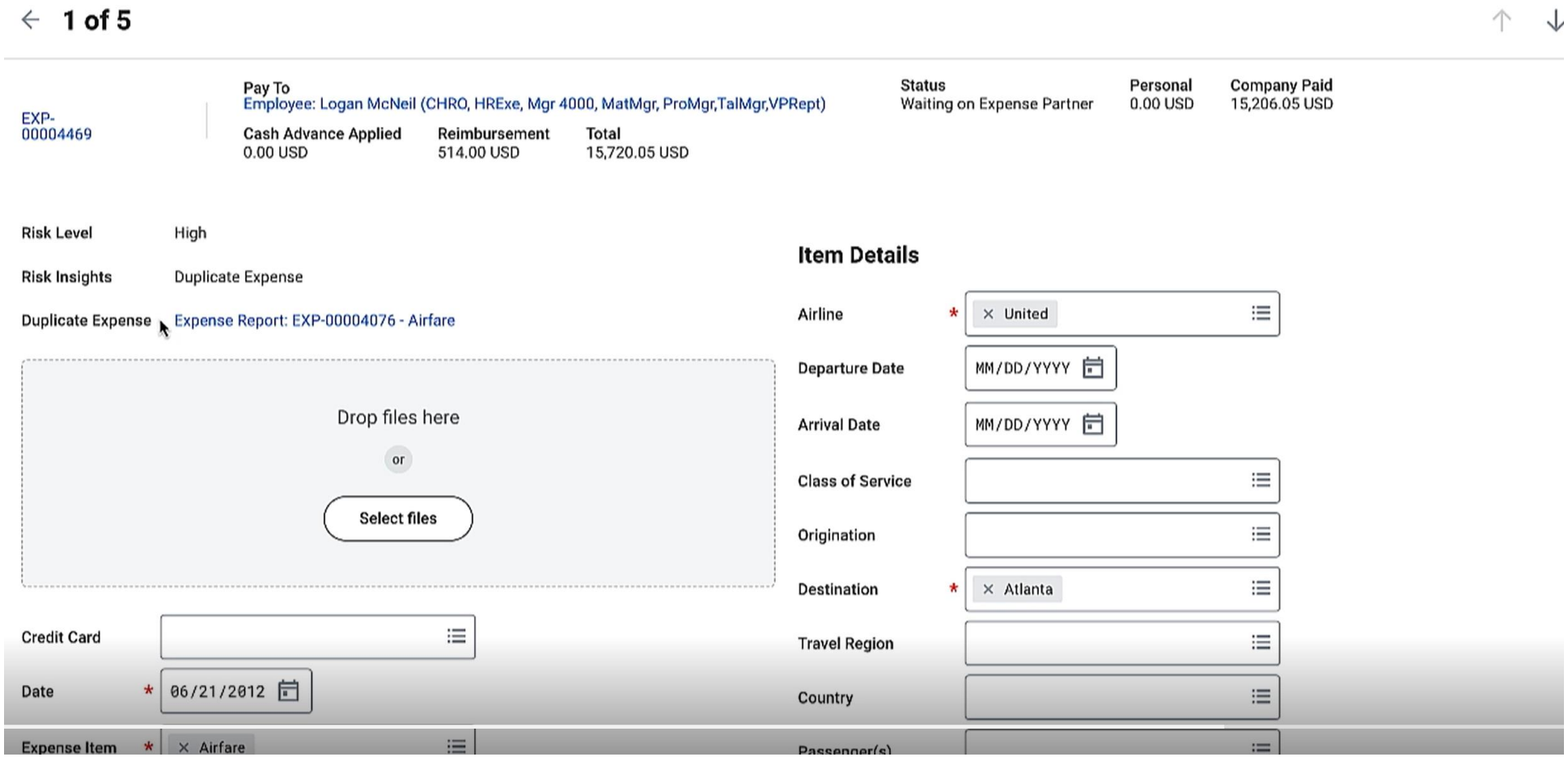
Expense Lines 5 items

Grouping Label	Risk Level	Risk Insights	Expense Item	Charge Description/Memo	Total Amount	Converted Amount	Expense Report Line Date	Itemized	Worktags	Indicator
Thu, Jun 21	High	Duplicate Expense	Airfare		514.00 USD	514	06/21/2012		Cost Center: 40000 Office of CHRO Location: San Francisco Region: Headquarters - Corporate	
Tue, Apr 11	High	Amount Anomaly	Airfare	SEOU_MERCHANT NAME	6,100.52 USD	6100.52	04/11/2017		Cost Center: 40000 Office of CHRO Location: San Francisco Region: Headquarters - Corporate	

C1 - INTERNAL

© 2023 HR Path

Step 5



© 2023 HR Path

2. Journal Line Anomaly Based on Amounts

Feature Description

Workday continues to enhance Journal Insights functionality by providing anomaly detection by individual journal line amounts. If a journal line debit or credit amount is abnormally high or low based on historical patterns, Workday will flag the journal line as an anomaly, enabling you to make a more informed decision to correct, confirm, or dismiss the anomaly.

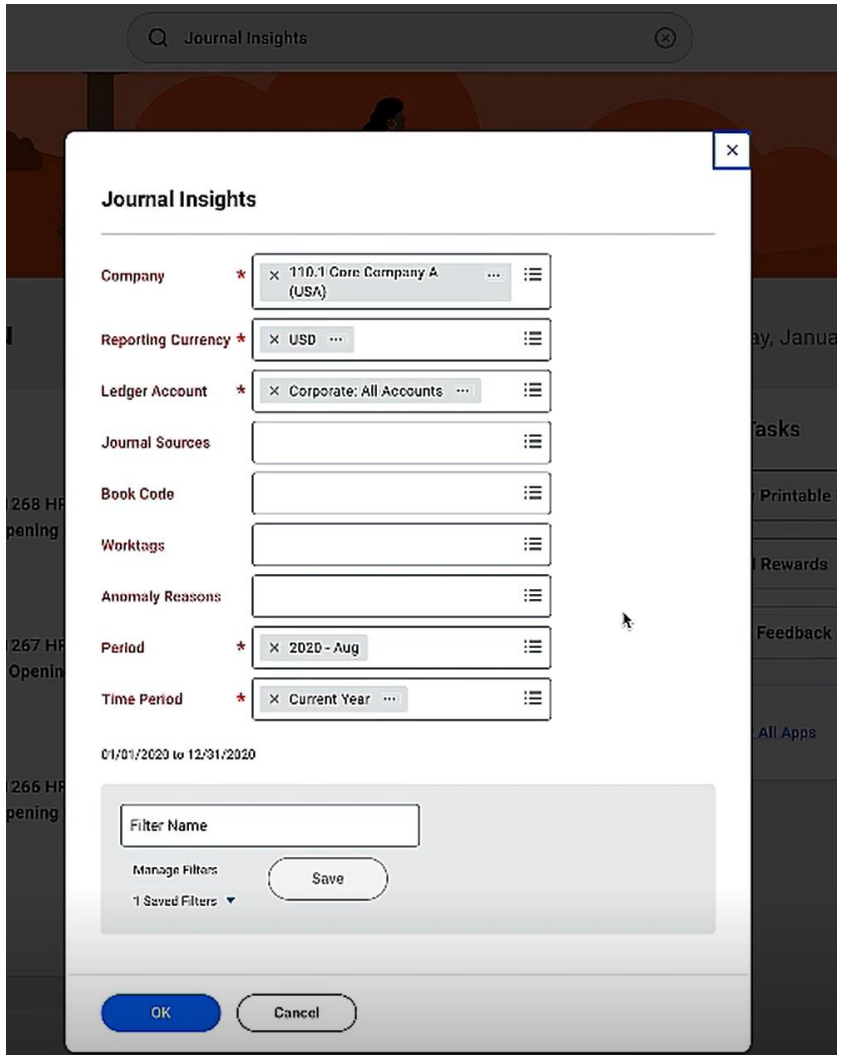
To Do

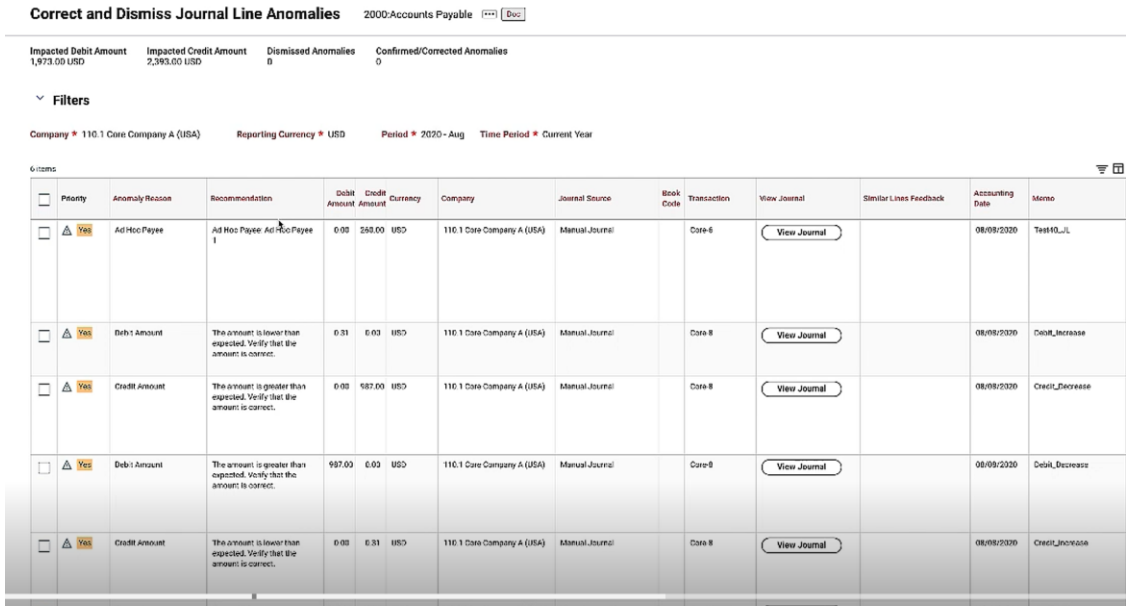
1. This feature is automatically available as long as you have Journal Insights currently enabled in your tenant. We recommend you update your training materials so that users are aware of the changes

© 2023 HR Path

Zoom in Journal Line Anomaly Based on Amounts

1





© 2023 HR Path

3. Workday Messaging for Canada

Feature Description

With this release, Workday continues to enhance Workday Messaging by expanding support for Canadian phone numbers. Workday Messaging now can provide Canadian phone numbers to companies that operate in Canada, allowing them to send SMS messages to recipients with either Canadian or US phone numbers.

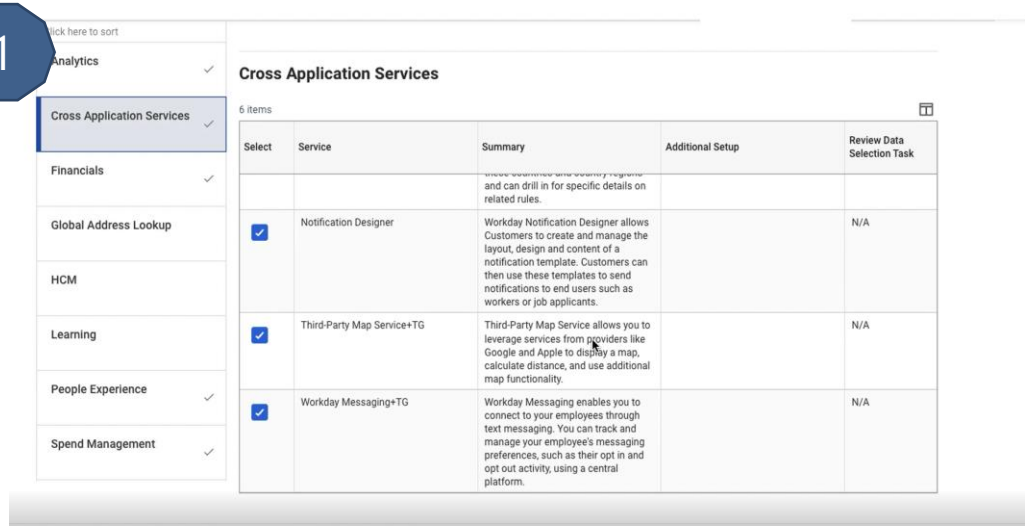
To Do

1. If you've already configured Workday Messaging, Workday Messaging for Canada is automatically available to you.

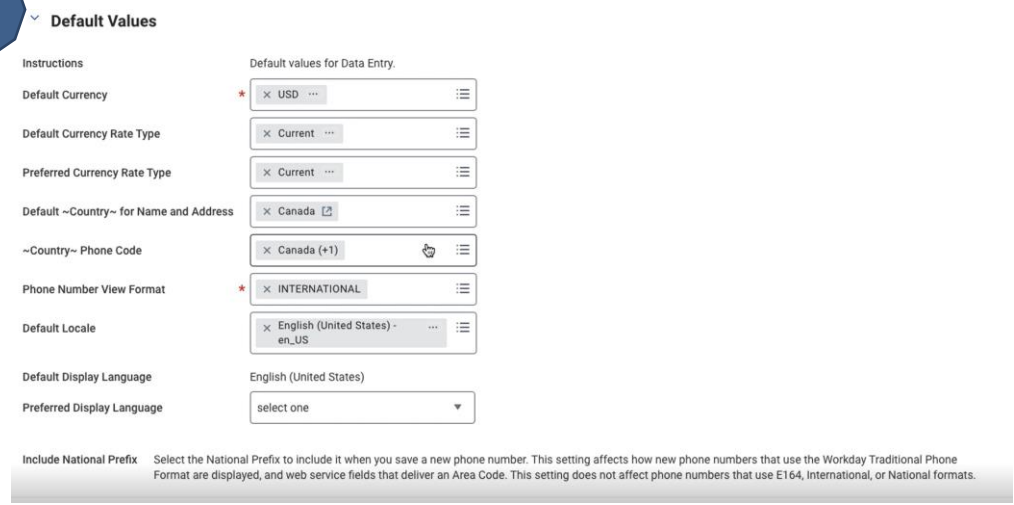
© 2023 HR Path

Zoom in -Workday Messaging for Canada

1

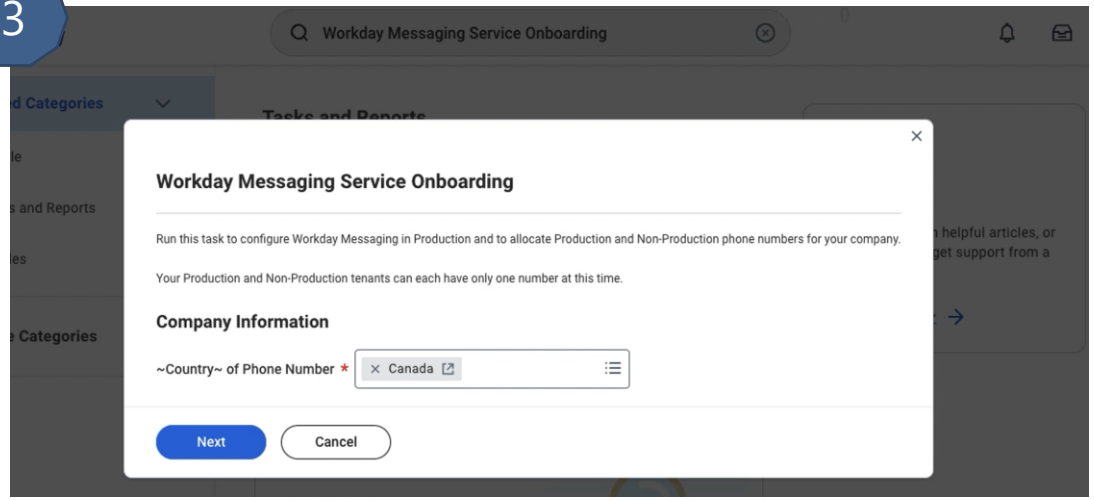


2

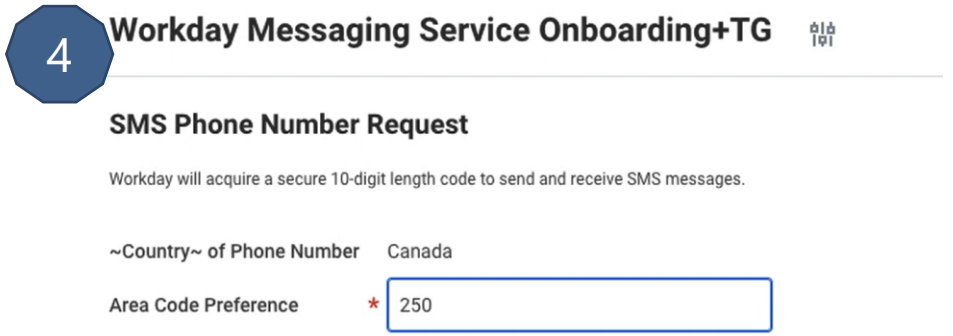


5

3



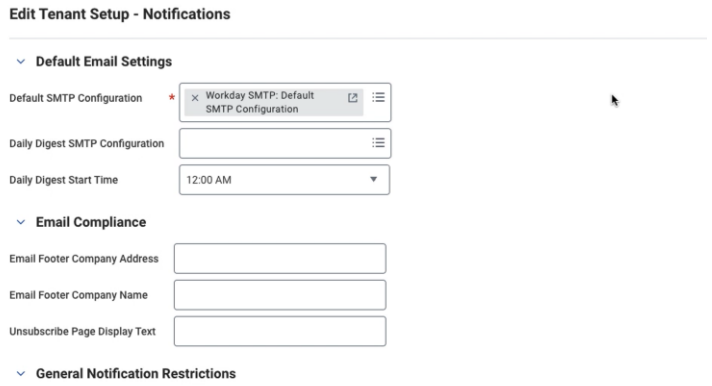
4



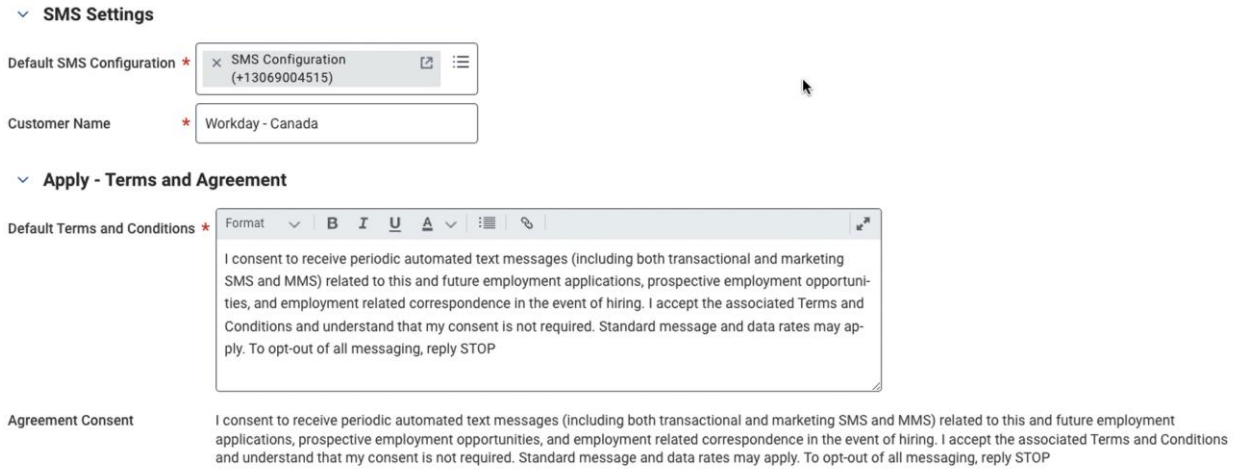
© 2023 HR Path

Zoom in -Workday Messaging for Canada

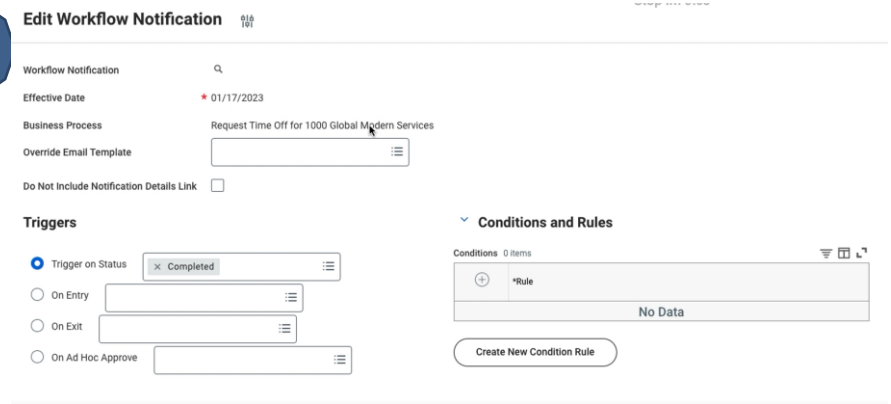
5



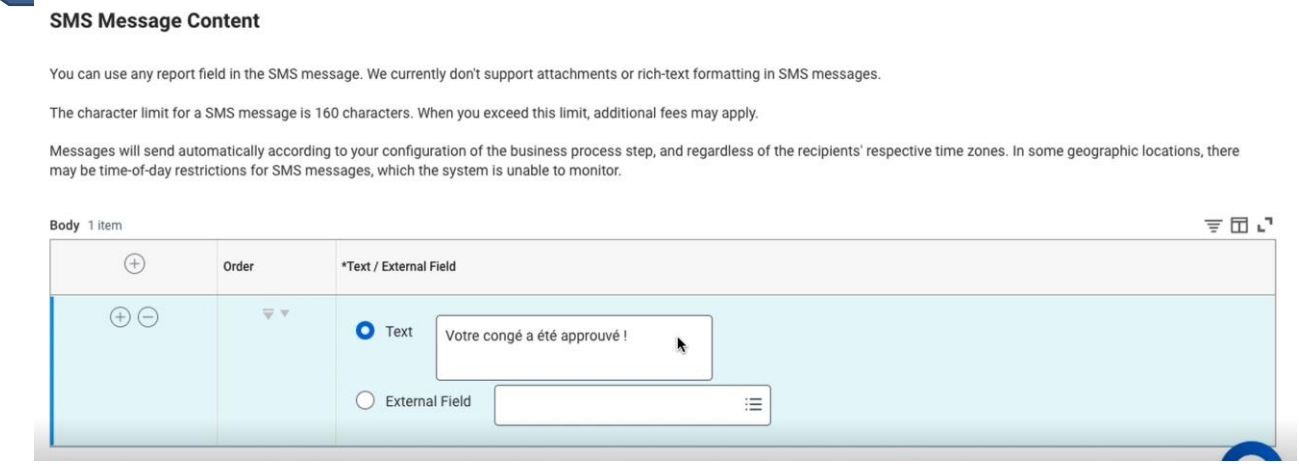
6



7



8



© 2023 HR Path

Zoom in -Workday Messaging for Canada

4. Send Emails From Multiple From Addresses

Feature Description

Workday now enables you to send emails from multiple addresses, allowing you to deliver emails from a different email address for each company or functional area within your organization. This streamlines communications from Workday, allows you to tailor your email communication to suit your business needs, and improves visibility into your outgoing email.

To do

Access the Create Email Configuration task to create a new Customer SMTP. When you create a custom business process notification for a business process definition, select the Customer SMTP configuration from the Email Configuration prompt.

© 2023 HR Path

Zoom in Send Emails From Multiple From Addresses

Example of implementation

You want to send customer invoices from different email addresses of each given company. To do so, follow these configuration steps:

1 - From the related actions menu of the Customer Invoice Email Event business process definition, access the Add Notification task.

2 - Create a custom notification for each company or company hierarchy.

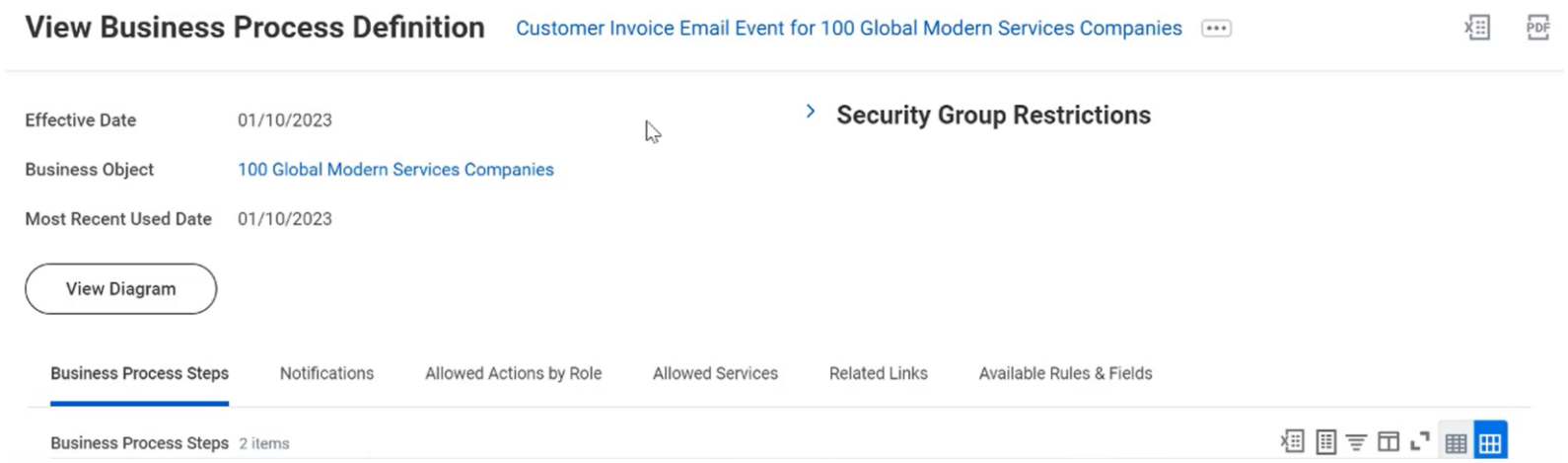
3 - From the related actions menu of the custom notification for the given company or company hierarchy, access the Edit Notification task.

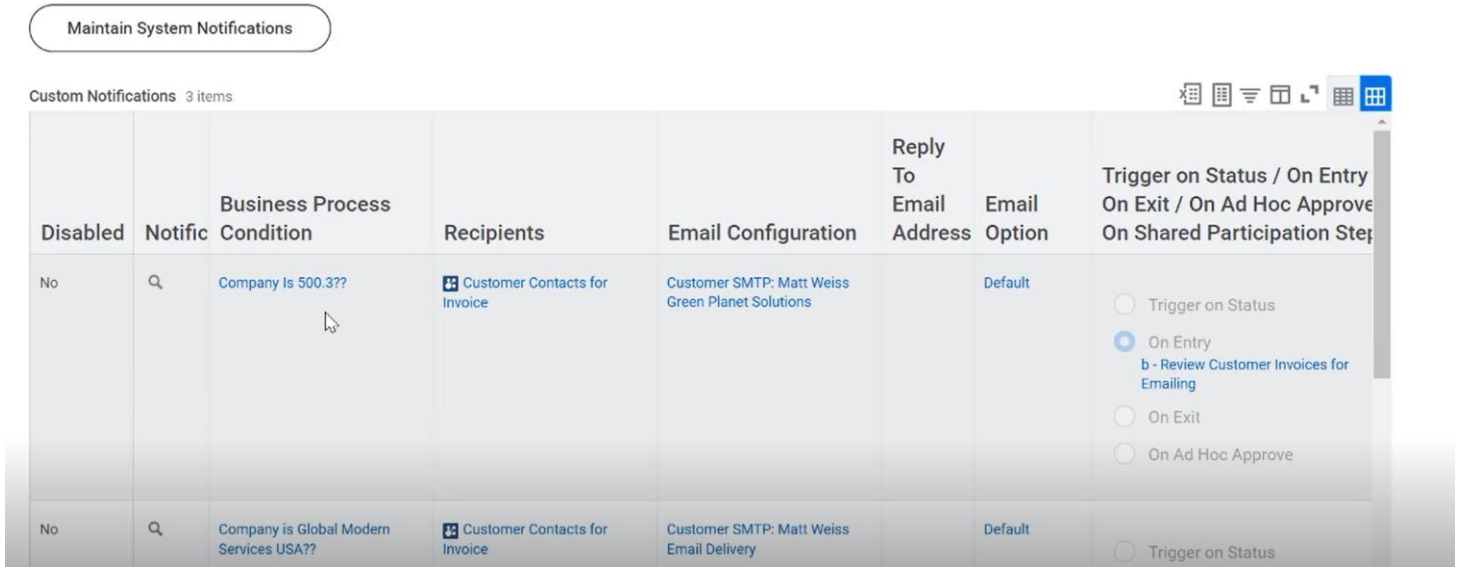
4 - Specify the customer SMTP configuration you created earlier for the given company in the Email Configuration prompt.

5 - Create a condition rule where the Source Field is Company and has an Operator of Is In Selection List. Specify the desired companies in the Comparison Value prompt.

© 2023 HR Path

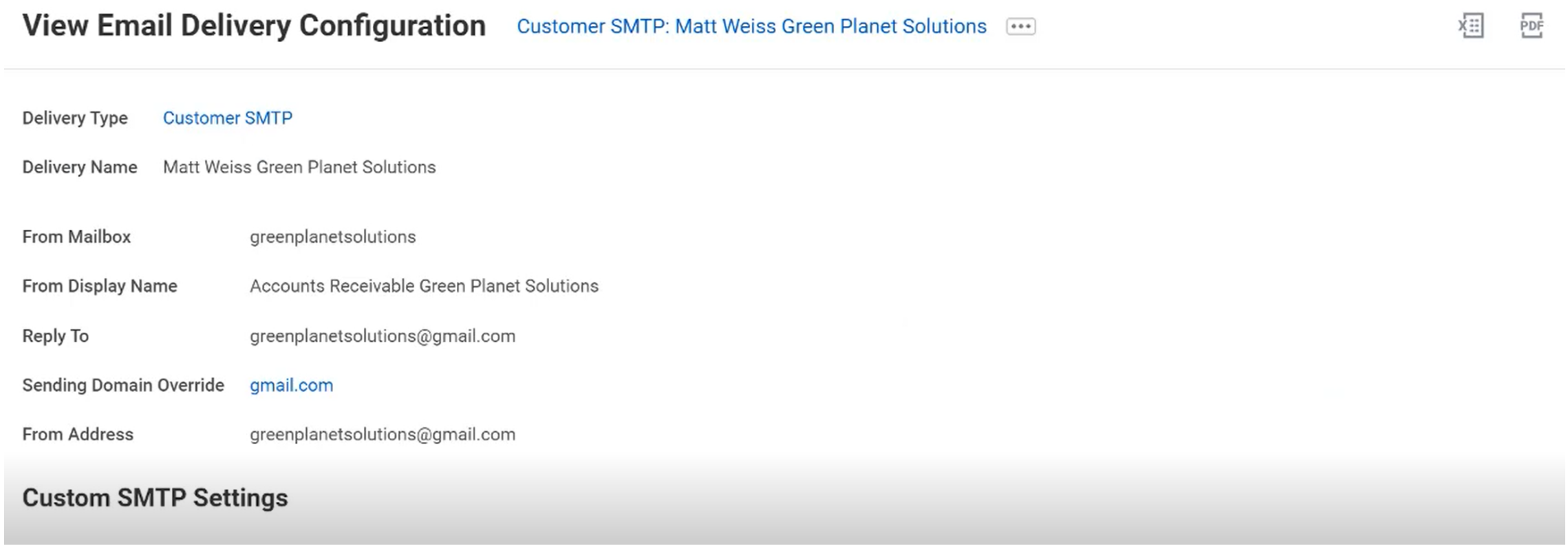
Zoom in Send Emails From Multiple From Addresses





© 2023 HR Path

Zoom in Send Emails From Multiple From Addresses



© 2023 HR Path

5. Goals API and Reporting

Feature Description

With this release, Workday enhances the Performance Enablement v4 REST web service, enabling you to integrate goals into 3rd party applications like Slack and Microsoft Teams.

Extra insight

Workday adds a new Goals API in the Performance Enablement v4 REST web service, enabling applications to access goals for specific workers. We deliver a GET operation, enabling you to view goals for specific workers.

We deliver a new Goal State report field on the Goal business object (secured to the Self-Service: Employee Goals and Worker Data: Employee Goals domains) that you can use to report on the current state of a goal.

A goal can be in 1 of these states:
- Pending Approval
- Associated with In Progress Review
- Pending Archive
- Pending Restore
- Saved for Later
- Needs Revising

© 2023 HR Path

6. Bulk Import for Change Benefits Web Service

Feature Description

Workday delivers a new Bulk Import Change Benefits (WS Background Process) web service (secured to the Benefits functional area) enabled by the Change Benefits for Life Event business process. This web service is built on the existing Change Benefits web service and follows the security configuration assigned to the Change Benefits (Web Service) initiation action on the business process security policy.
This web service improves performance when loading large volumes of benefit changes. Workday notifies you after you submit a change benefits request with a job ID so that you can track the request through the process monitor.

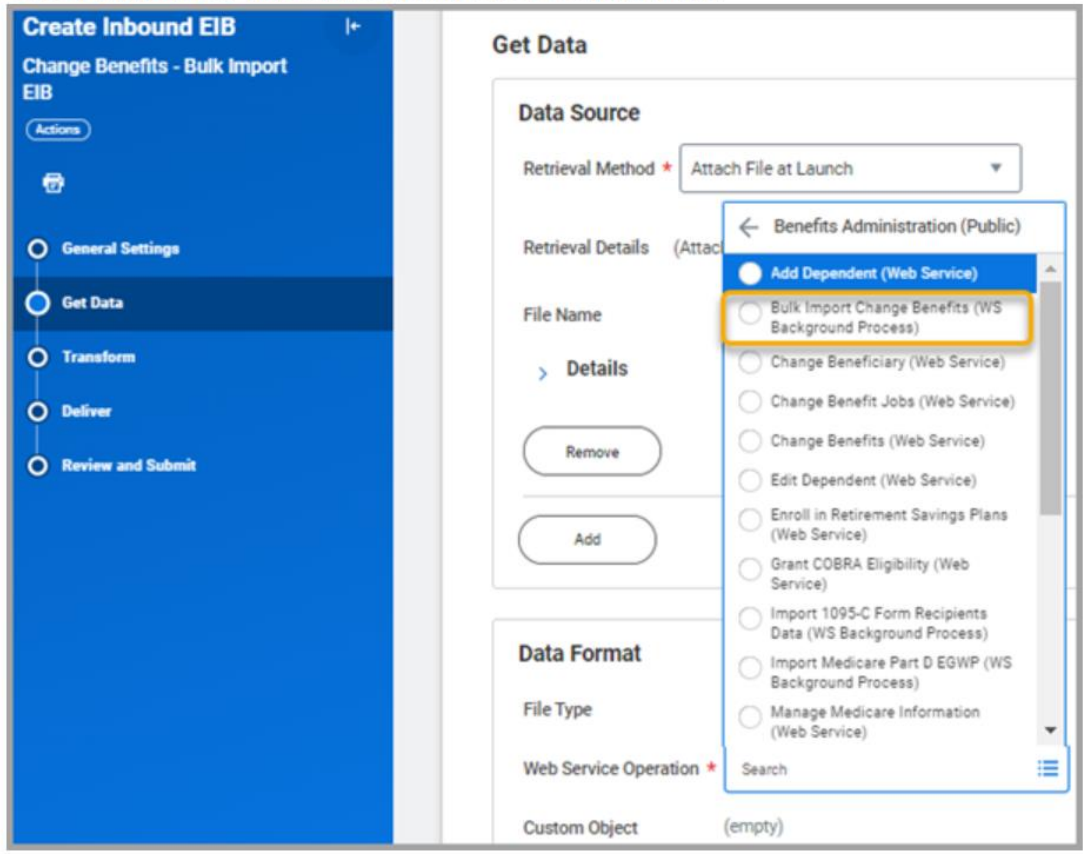
Extra insight

- We don't allow managers to request flexible work arrangements for ineligible workers. Similarly, ineligible workers can't request flexible work arrangements for themselves.
- When you test condition rules for a future-dated position, Workday evaluates the rule at the moment the task runs, not as of the effective date. This can result in the condition rule becoming ineligible at the time of testing.
- When you have both condition rules and country restrictions set up, Workday requires both to be true in order for the subtype to display when requesting or adding a flexible work arrangement.

© 2023 HR Path

Zoom in Bulk Import for Change Benefits Web Service

1. Screen print of new web service option when creating an EIB.

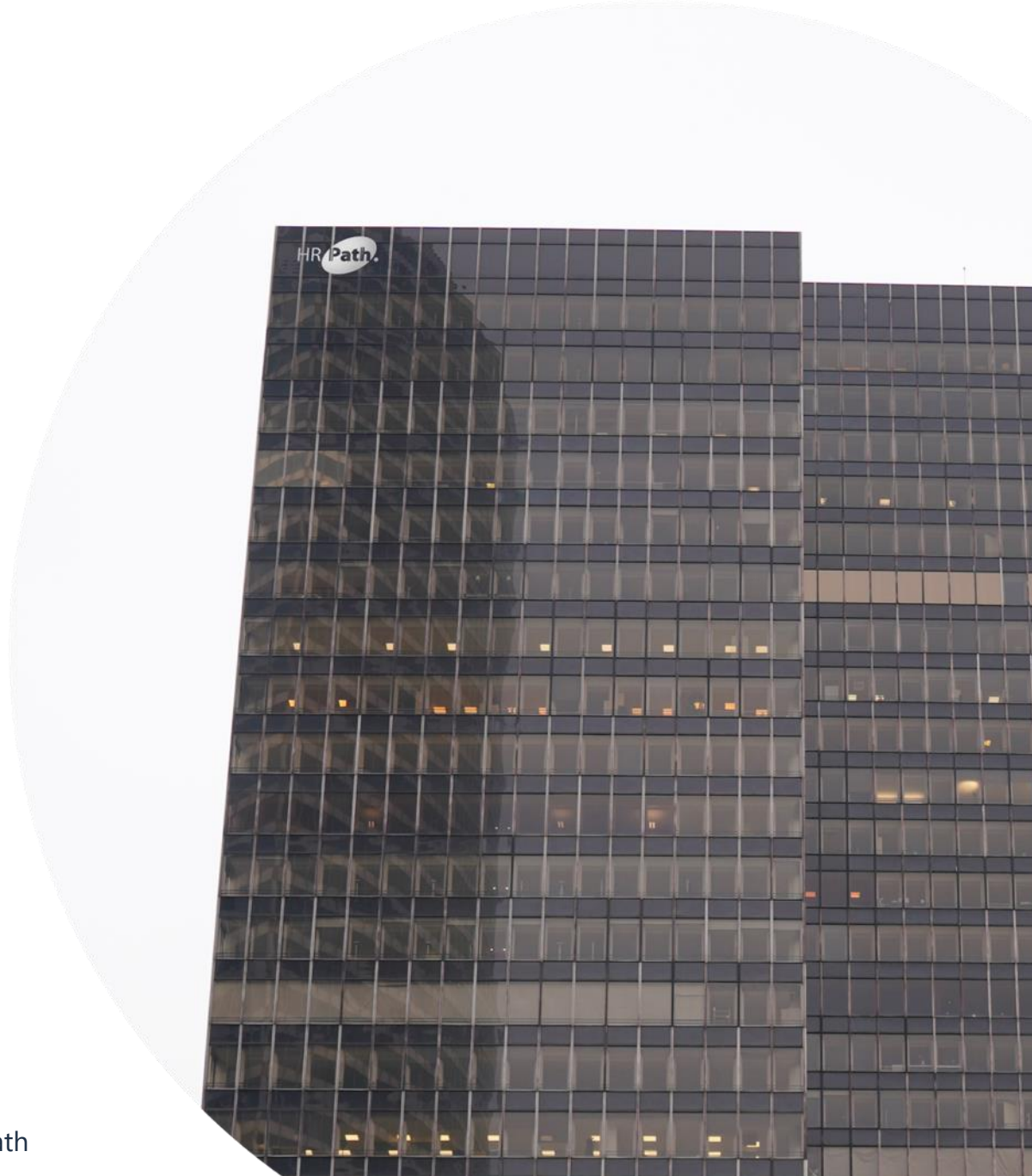


© 2023 HR Path

Thank you for your attention

Please do not hesitate to contact us

HR Path Corporate
HR Path Tour (Franklin) **11th floor**
100 -101 Terrasse Boieldieu
92042 Paris La Défense Cedex
+33 (0)1 53 62 22 14



© 2023 HR Path