Workday Enterprise Resource Planning (ERP) - Financial Management Service Definitions

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workday

Datasheet

Workday Financial Management.

Today CFOs face mounting pressure to help their business create value. And accounting must also support the business more strategically. To do so requires shifting the balance of where time is spent. Going beyond simply managing core accounting processes and producing financial statements requires a new way of thinking and working.

Time spent manually entering transactions, aggregating data, reconciling accounts, and searching for exceptions must be replaced with strategic analysis and decision support. The challenge, however, is that the technology finance teams use is rigid and difficult to adapt to new business needs. As well, it requires batch processes that can delay progress. On top of this, these systems make it challenging to deliver real-time insights, which makes it difficult to assess real-time performance and quickly course correct.

Fortunately, there is a solution. By making technology work for both accounting and the business user with an in-memory object architecture and AI built into the core, Workday delivers a single system to support data management and intelligent automation across core finance business processes such as close and consolidation, multidimensional reporting, and compliance—all with a consistent user experience accessible from desktop or mobile devices.

Embrace change at speed and scale.

Workday is the only cloud solution built on an adaptable architecture that empowers finance to address changing business needs quickly and securely with flexible finance and accounting processes. Thanks to this flexible framework, finance can incorporate M&A, pivot organizational structures, and add new requirements within minutes versus weeks or months. And Workday does this while providing pervasive internal control and auditability—documenting the who, what, and when as you go. And it is global at the core to ensure compliance with international and local market requirements as well as consistency across worldwide operations.

Managing globally, executing locally.

The global financial framework not only allows customers to adapt with changing requirements, but it also allows customers to meet multinational requirements without hard-coded customizations. The business process framework (BPF) provides a pervasive workflow across Workday, helping customers to standardize critical business process workflows and reporting around the globe, which makes addressing new requirements less labor intensive.

Key Benefits

- Drive real-time insight with continuous accounting
- Automate revenue and expense accounting
- Quickly gain a more complete and accurate picture of your business
- Equip executives and business managers with relevant, contextual financial insights—available on the device of their choice
- Provide best-in-class and pervasive always-on audit capabilities
- Embrace organizational, process, and reporting changes without business disruption
- Provide a consistent and easy-to-use interface for all users—employees, managers, executives, and auditors

Key Features

- Accounts Receivable and Collections
- Accounts Payable and Payments
- Asset Management
- Audit and Controls
- Billing and Invoicing
- Cash Management
- Contracts
- Financial Reporting and Analysis
- [Global] Close and Consolidation
- Multi-GAAP/Multi-Book/Multi-Chart of Accounts
- Revenue Management

Results

- 70% reduction in time to close
- 50% reduction in external audit requests
- 59% reduction in ledger accounts

Multibook functionality enables reporting of financial results based on multiple accounting principles. Workday supports organizations with operations in over 130 countries, with standard out-of-the-box configurations available for 55+ countries.

Meeting new accounting standards.

When new accounting standards are required, Workday assesses their impact and provides the capabilities required to support and assist with adoption. This eliminates some of the work traditionally required to maintain adherence to changing GAAP and IFRS standards.

Standardizing global processes.

By standardizing global business processes using the Workday BPF, organizations can accommodate multiple and complex business tasks within a single workflow. When creating a new process for a unique business need, organizations have the discretion and flexibility to set up unlimited, unique business process steps keyed to the needs of specific locations, organizations, or groups at the same time, within that workflow. Because business processes are defined and tied directly to organizational structures and role-based security, they can be controlled centrally while allowing in-region flexibility as needed.

Accounting is just the start.

Workday Financial Management supports all the accounting and finance functionality that global businesses require. Today, the business demands that finance functions such as accounting move beyond a transaction focus in favor of new ways of working. With new technologies such as AI, finance has the opportunity to usher in a new era of efficiency and gain time back to focus on other areas of the business. AI interrogates data to continuously search for anomalies and make recommendations, helping finance usher in a new era of efficiency and frictionless and intelligent processes, giving time back to focus on analysis and action.

Not just a general ledger.

Workday keeps all the operational information surrounding transactions while maintaining the accounting information expected of a global general ledger. This means you can go beyond traditional accounting key segments that retain information such as cost center, account, and product, and expand the segments to include details including supplier, customer, geography, and more. This provides greater context around business performance and leads to richer analysis.

The Workday general ledger also fully meets global regulatory and financial reporting requirements with capabilities including multicurrency, multilanguage, multibook, and more—all built into the core system to support multinational requirements today and into the future. What's more, Workday delivers continuous accounting—replacing static batch processing with real-time accounting creation. This means that as transactions are approved, accounting information is automatically generated along with intercompany, eliminating entries and translations. And you can control multiple operating entities,

Related Workday Applications

- Workday Accounting Center
- Workday Prism Analytics
- Workday Adaptive Planning
- Workday Projects
- Workday Expenses
- Workday Procurement
- Workday Strategic Sourcing
- Workday Inventory
- Workday Grants Management
- Workday Project Billing

By intelligently automating finance business processes, accounting teams are able to spend less time on transaction processing and more time on analysis and action.

companies, or business units to easily complete allocations, adjustments, and consolidated reporting. All of this is posted and reflected in the latest reports, delivering real-time insight into performance.

In addition, Workday applies AI at the core and includes a feature called journal insights, which interrogates all journal data as it is created to highlight unusual behavior and anomalies. This continuously determines the business areas that require attention, helping to empower accounting to take corrective action as needed rather than waiting until the end of the financial reporting period. Journal insights also combs through your entire financial dataset, giving your team greater confidence in the financial data you close, consolidate, and report on.

Automate and control your cash flow.

A system that shows you real-time cash balances helps you manage resources effectively and make better decisions about funding, paying, and collecting money. The Bank Connectivity feature in Workday Financial Management enables organizations to easily integrate and interoperate with banks to bring in bank statement files and execute payments. Included with this connectivity is the proactive monitoring of changing file formats and delivery requirements, ensuring payments and bank statements are sent and received properly. In addition, Workday offers a single settlement engine that processes payments across all transactions, including supplier payments, employee expense reimbursements, customer payments, and payroll. By having complete visibility into all inflows and outflows, you can forecast future cash flow requirements more accurately.

Fixed assets—big and small.

Assets used to be large, expensive, and fixed. While traditional fixed-asset systems handled the accounting of large, immobile assets, they were never designed to help companies manage the high-value, low-cost resources that so many businesses now rely on, such as laptops, mobile devices, web-conferencing accounts, security badges, and other "utility-belt" items for today's workforce. Workday combines the traditionally separate domains of fixed assets and inventory with the ability to manage the small and inexpensive items that are still important to your business.

Proactive audit and compliance.

Workday helps you safeguard against operational risk by building audit and controls pervasively into the fabric of Workday. While other providers offer bolt-on governance, risk, and compliance solutions, they can be used electively as their application can degrade system performance. However, Workday has always-on controls as part of the BPF, enabling organizations to easily configure, visualize, and adapt internal business processes. As changes are made, our always-on audit capability continuously captures approvals and changes in the system to provide visibility into who took what action and when—all for no additional cost.

Every transaction is documented, creating undefeatable electronic evidence that enables you to proactively manage risk and monitor compliance.

The embedded BPF manages every transaction, captures all required information, follows the configured approvals, and ensures that the accounting impact of every transaction is immediately auditable upon approval. Audit reports and dashboards are preconfigured to monitor activities and compliance and make it easy to view trends in real time, such as an increasing number of expenses without receipts. From these dashboards you can drill down to take further action to rectify any areas of concern.

Organizations can accommodate local regulations around the world, increase process visibility, and reduce operational risk. Your business processes, audit trails, and security models are all natively built into Workday, eliminating the need for a separate bolt-on solution.

Revenue management.

With Workday, you can gain a 360-degree, cross-functional view of your customers, enabling you to take care of the entire revenue lifecycle. You can integrate with any CRM system and configure contract management, billing schedules, and revenue recognition to help you manage your business in the most profitable way while maintaining customer satisfaction.

Customer and contract management.

Create, approve, and track your customers and customer contracts to maximize visibility and minimize risk to your organization. You can capture all contract changes throughout the life of the contract, and even decouple billing and revenue-recognition schedules.

CRM integration.

Workday Financial Management Connector for Salesforce provides complete visibility and accuracy across the quote-to-cash process. Easily integrate opportunity management data from salesforce.com to Workday for streamlined, configurable quote-to-cash process automation.

Services configure, price, and quote (Services CPQ).

Workday Services CPQ provides the only services-specific CPQ solution on the market. This offering accommodates the unique elements of services quotes including roles of individuals assigned to projects, project phases, tasks, rates related to the tasks and roles—supporting businesses in bringing greater speed, accuracy, and confidence to the way opportunities are quoted.

Invoice, collect, audit.

Workday supports various types of billing and payment terms to help your organization automate customer invoices and ensure their accuracy. Reduce the need for manual intervention and minimize revenue leakage thanks to automated, configurable billing processes.

Operate with greater efficiency and at a lower cost with an intelligent system that uses machine learning to continuously detect anomalies and make recommendations.

As well, Workday applies AI to the collections process to address customer payments missing remittance details. While it accounts for only 20% of the customer invoices, it can consume up to 80% of the AR team's time. By applying AI, Workday can intelligently review previous customer payment patterns and behaviors and recommend customer invoice matches to the payments. AR teams review and interpret the recommendations and decide how best to act. The more they engage with AI, the better the recommendations become and the more time AR teams save.

Customer collections.

A single source of intelligence allows you to organize shared services centers based on customer behaviors, needs, and contribution size. Workday enables your collections team to prioritize customers and invoices based on risk scores. A customer collections dashboard highlights this risk, so you can convert accounts receivables to cash as quickly as possible and prioritize which accounts require a collector to intervene.

Easily meet the latest accounting standards.

Greater scrutiny over when and how much revenue can be recognized has increased. Workday allows you to easily record revenue events, complete fair-value analysis, link contracts, and allocate and recognize revenue for simple and multielement arrangements. You can manage billing and revenue recognition independently in order to identify the correct amount of revenue at the right time. With Workday, you can create alternate contracts and build what-if scenarios to model out and assess the impact of different revenue recognition strategies. Workday significantly simplifies your ability to meet dual reporting and disclosure requirements with the ability to leverage the alternate contract and reporting capabilities.

A new level of insight for finance.

Workday takes a different approach than traditional ERP and BI vendors, creating reports more efficiently and delivering deeper analysis by using a multidimensional model and real-time accounting and reporting that can be enriched with operational data. Workday captures business dimensions at the point of transaction and maintains them through transactional, management, and financial reporting. In addition, the in-memory architecture in Workday creates and updates accounting and financial reports in real time. This eliminates the need for batch processing and drastically reduces time spent on reconciliation.

Expanded breadth and depth of insight.

For businesses to succeed, they need the most current and accurate dataset to determine how to act and where to course correct.

The object data model in Workday maintains all the rich details around business events from transactions through financial statements and management reports. This enables analysis by configurable dimensions with strategic significance to the business beyond the accounting key. In other words, you can analyze the business across virtually every dimension: legal entity, cost center, account, campaign, location, team, supplier, customer, and more.

Businesses can expand this data model and unite their ecosystem data by integrating high-volume revenue and expense data into Workday and automating the accounting creation process. This information is blended together with other rich operational attributes, creating the most granular set of data compared to any other ERP in the market, empowering finance to drive better decision-making.

Workday allows you to perform drag-and-drop ad hoc analysis and uncover new insights from blended analysis. All data is protected through the same security model as native Workday data and can be presented to users on the dashboards where they already work—providing a single source for data across the entire business.

Real-time financial consolidation.

And with all accounting in a single system, Workday simplifies financial consolidation, and financial statements can be run whenever accounting needs to see the latest and most accurate picture of the business. Workday also makes the close process easy to manage and monitor, with checklists and dashboards that provide transparency into information as it is gathered, translated, and closed to ensure your team is confident in the numbers, process, and reporting.

Once the data is consolidated and available via operational and statutory reporting, then you can interact with it. Simply drill from reports instantaneously into detailed transactions for further analysis, or slice the data by another dimension. Financial scorecards are configured to reflect the most accurate financial picture, with metrics to provide comprehensive insights into the business. As a result, finance can respond quickly and effectively while empowering the rest of the business with a single source of truth.

To explore how Workday Financial Management can help your organization, please visit: workday.com/cfo

Deploy Workday and realize value, fast.

Workday offers deployment services, training, support, and continuous innovations to help you use Workday with confidence as your organization evolves. Because each customer has different requirements, resources, and goals, we've designed our services to meet a variety of needs and learning styles.

To help you reach your goals faster and empower your teams, subscription-based Workday Success Plans offer exclusive access to resources, tools, and expertise for an even deeper understanding of Workday.

For more information, visit: workday.com/cx

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Use Case

Redefining insights with Workday Accounting Center

Create rich insights through automated accounting for your business

The volume of data that businesses are facing is growing at an unprecedented rate. In 2023, businesses generated approximately 129 zettabytes of unstructured data, and this figure is expected to more than double by 2027.

CFOs face mounting pressure from this data explosion. Poor data quality and fragmented systems directly slow down the financial close, complicate account reconciliation and create audit headaches. Without effective data strategies that connect financial, and operational information, finance teams waste countless hours manually piecing together critical reports.

Transforming financial and operating data into strategic insights

Workday Accounting Center, powered by an analytics engine, unites your entire ecosystem of information and delivers the most granular set of insights in any ERP.

Best of all, this data ingestion and enrichment engine is owned by finance and accounting. Between accounting's in-depth understanding of the data's business context and a simple and intuitive experience, decisions can be made quicker so you can reduce reliance on IT. Instead, your team can spend more time on value-added activities rather than on manual compilation and spreadsheets.

The biggest challenges CFOs are facing

Challenge	How Workday Accounting Center helps	Benefit
Data silos and disjointed information across multiple systems	Unite data across systems through easy integration and intuitive data preparation tools that blend external data with Workday Financial Management.	• One secure source of finance truth • Simplified data integration • Complete report-to-source data lineage
Manual processes and complex reconciliation between systems	Written in business language, not code, it empowers accounting to automate data transformation and configure accounting rules with ease.	• Automated journal creation • Streamlined reconciliation • Reduced errors and delays
Limited analysis due to summarised data and delayed reporting	Combine detailed accounting with operational dimensions in one system of record, with complete audit trails.	• Granular business insights • Faster, more accurate forecasting • Real-time performance analysis

Turn finance challenges into opportunities

Data integration

Workday Accounting Center simplifies data integration through automation. The platform automatically integrates revenue and expense data from any source, while intuitive tools help blend external data with the data already residing in Workday. This unified approach ensures data consistency.

Our interoperability with third-party systems means finance teams can easily connect to external data sources. As data flows in, the platform automatically provides complete visibility into each step of the process. Visual dashboards track each step of data transformation, and built-in quality controls maintain data integrity throughout.

When issues arise, teams can quickly pinpoint and resolve them. Rather than reprocessing entire batches of data, users can fix specific feeds with precision and accuracy. This precise control over error resolution, combined with complete end-to-end process visibility, helps finance teams spend less time on data preparation and more time on strategic analysis.

checkout.com

Data integration in action: Checkout.com

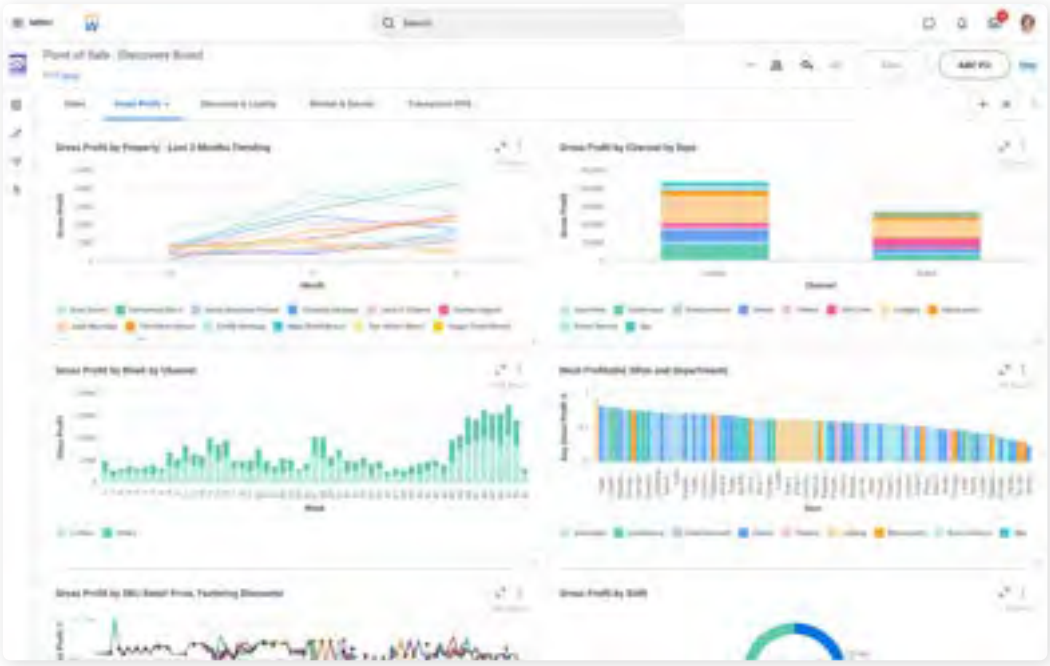
Checkout.com struggled to convert massive volumes of payment processing data into usable accounting information. Hundreds of disconnected spreadsheets made analysis nearly impossible.

Workday Accounting Center helped the organisation:

- Eliminate spreadsheet manipulation by automating conversion of transaction data into accounting entries
- Improve reconciliation efficiency through direct mapping of granular payment data to double-entry accounting records
- Reduce manual work while significantly increasing data accuracy and consistency

> We used to have hundreds of spreadsheets, but no way of interrogating anything or joining the dots between them [. . .] now [we] use the existing work and controls from operational finance to support our statutory results – a massive, massive game changer

Enterprise Architect, Finance Transformation
Checkout.com



Finance-led data management

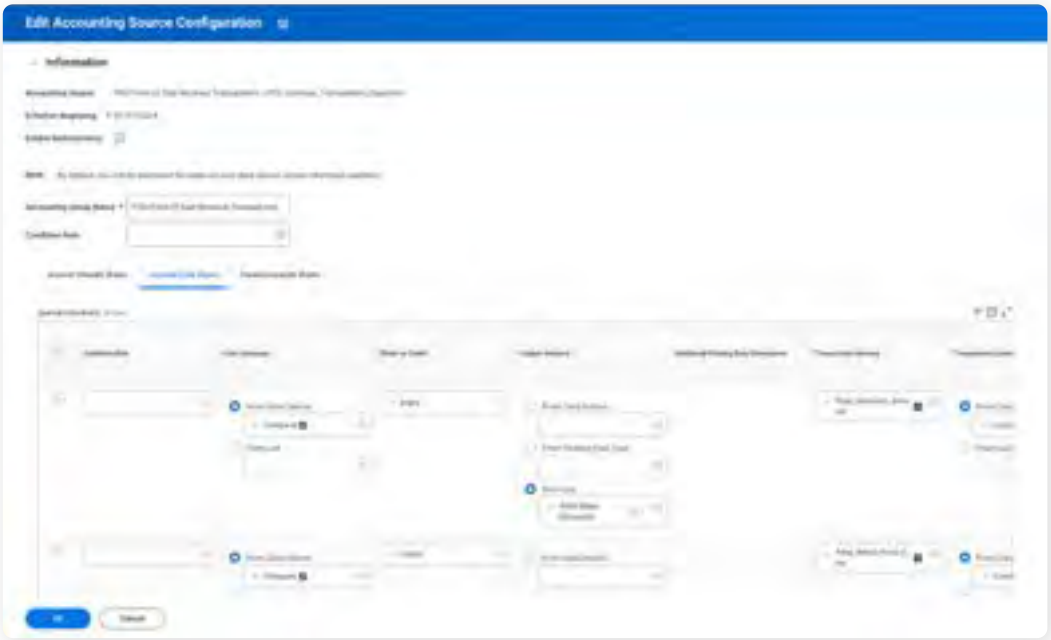
Put your finance team in control of financial data management. Workday Accounting Center automatically turns business events into detailed accounting entries through automated journal line creation, while our object data model combines accounting and operational data directly in your system of record.

Finance teams can configure and adapt accounting rules using business language rather than complex code. This flexibility extends to revenue and expense transformation, where automated processes maintain detailed operational context throughout. The platform handles General Ledger posting automatically while ensuring multi-GAAP compliance.

Built-in audit trails track every change to provide complete management and regulatory reporting support. This comprehensive documentation, combined with automated compliance checks, gives finance teams confidence in their data while reducing time spent on manual oversight.

> Now we can interface with the core system via Workday Accounting Center to drill down straightaway at a transactional level. That's a million miles from what we had before.

Head of Finance Transformation
Coventry Building Society



COVENTRY Building Society

Finance-led data automation in action: Coventry Building Society

Coventry Building Society's ageing financial systems restricted data access and made manual processes necessary for even routine financial tasks.

With Workday Accounting Center, the organisation:

- Automated data extraction and transformation, which significantly reduced the manual workload
- Enabled direct access to both summarised and detailed transaction data in one system
- Accelerated month-end close processes while providing deeper cost analysis capabilities

Granular insights that lead to decisive action

Workday Accounting Center delivers the detailed insights finance teams need to drive strategic decisions. Because every transaction maintains its complete context and data lineage, teams can drill from high-level metrics to the finest details – all from one source of truth.

Performance analysis reaches new levels of precision. Teams can examine their profit and loss account from every angle: by line of business, product, sales region or individual salesperson. This granular view reveals patterns and opportunities that would remain hidden in summarised data. Finance leaders can track performance drivers, identify trends and create accurate forecasts based on complete information.

For example, when a restaurant notices food and beverage revenue is lower than usual, its finance team can drill directly from that line item to see exactly what sold, from broad categories such as food and alcohol down to specific meal types and even individual menu items. This immediate insight helps identify trends and opportunities. Because Workday unites HR and financial data, teams can also analyse how staffing patterns affect sales, identify top performers and ensure compensation aligns with results – all from one report without manual compilation across systems.

This depth of insight extends across organisations. Business partners can analyse revenue patterns, operations teams can study cost drivers and finance leaders can make confident decisions backed by detailed data. From identifying your most profitable products to understanding sales patterns by region, these granular insights turn financial data into strategic advantage.

Granular insights in action: Just Eat Takeaway.com

Following the merger of Just Eat with Takeaway.com to form a new multinational delivery service, the organisation required one source of truth across multiple systems and regions.

With Workday Accounting Center, the company:

- Enhanced collaboration and reduced silos by sharing data across departments so key insights could become common knowledge
- Gained access to unified data across global operations so leaders can access what they need, when they need it
- Automated processes with no manual intervention needed

Why Workday Accounting Center?

Workday Accounting Center empowers your finance team with complete control over data transformation processes. Your accounting professionals maintain oversight of data ingestion, enrichment and accounting creation, enabling agile responses while reducing IT dependency.

Our platform features an intuitive interface where teams can automatically transform data into accounting entries while modifying rules through simple clicks rather than complex coding.

Data enrichment becomes seamless with built-in industry-specific calculations for amortisation, deferred revenue, prepaid expenses and more.

The platform provides real-time visibility into financial data while easily scaling to accommodate your organisation's growth.

Workday enhances security and compliance through continuous auditability, with internal controls that automatically track changes. The platform provides access to the industry standard for analysis, so you can uncover deeper insights faster to guide business decisions.

Ready to move your finance team forward? **Discover how Workday Accounting Center** unites your data and empowers your team with intelligent insights.

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Workday Expenses

Streamline expense management.

Accurate expense management has a huge impact on your bottom line. Travel and entertainment (T&E) continues to be one of the most difficult operating expenses to control, and organizations are looking at ways to further automate and simplify the expense reporting process to benefit both the organization and employees.

While employees want a fast and intuitive way to capture and submit their expenses, back-office teams need a flexible solution to enforce spending policies and identify cost-saving opportunities.

Workday Expenses addresses both of these requirements by providing organizations with a user-friendly experience and enterprise-grade functionality that helps capture, monitor, and control employee spend more accurately.

Manage expenses on the go.

Workday offers an easy-to-use, consumer web-like application, as well as an intuitive mobile experience that allows you to submit and approve expenses on the go from any device.

Employees can email receipts directly from their inbox or scan receipts on their mobile device to automatically populate data on mobile expense reports. From there, Workday AI can accurately read and interpret receipt data to automatically create quick expenses that can be easily added to reports. This not only helps your employees save time when filling out expense reports, but it also increases the accuracy of your expense reporting.

Effectively monitor and control spend.

Eliminate manual paper processes and easily configure expense workflows and approvals. You can also implement spend authorizations and spend freezes to plan for, control, or halt spending. Every transaction is recorded for audit transparency, and embedded analytics helps inform manager approvals and administrative decisions. Additionally, you can automatically identify expense report risks such as duplicate expense, incorrect expense item, and amount anomalies utilizing Workday AI.

Global at the core.

Reduce complexity and cost using a single global expense management application that natively handles international tax rules as well as regional reimbursement requirements. The underlying global core in Workday accommodates local customs and rules, including allowances, currencies, per diems, and vehicle mileage rates.

Key Benefits

Streamlined expense processing:

- Intuitive user experience
- Mobile expense reports and approvals
- Stronger controls through spend authorizations and freezes
- Reduced risk with automated expense error detection
- More-accurate and timely accounting and reimbursements
- Better adherence to global requirements
- Faster settlements

Ease of deployment and maintenance:

- Faster and easier deployment through the cloud
- Unified mobile applications for finance and HR

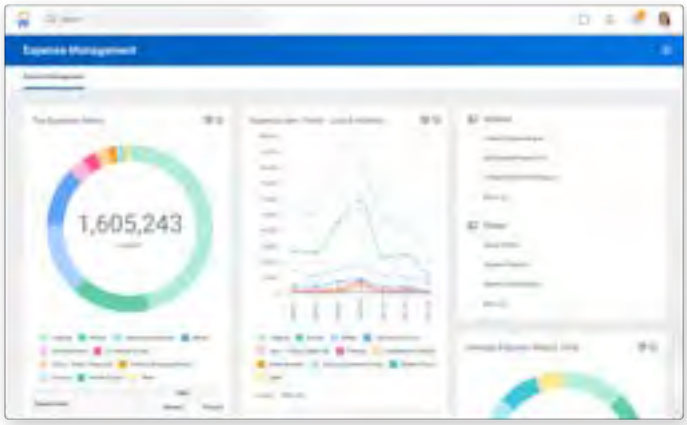
Stronger reporting and visibility:

- Better visibility into actual spend versus budget
- Detailed reporting and the ability to drill down by relevant business dimensions
- Approval cycle analysis
- Complete auditing visibility

Workday Expenses

Streamlined expense processes:

- Intuitive self-service application
- Configurable approval processes
- Packaged credit card integrations
- Configurable instruction text
- Direct deposit reimbursement
- Easy delegation of expense report creation or approvals
- Reimbursement accounts
- Itemization templates





Powerful, real-time visibility and control over organizational spend.

Gain actionable insight.

Actionable insight is the key to developing your spend policies and negotiating with vendors. With Workday Expenses hub, you can easily access your regularly used tasks, unexpensed receipts, and key reports. All approved expense transactions are immediately available to provide real-time visibility into actual versus budgeted spend. You can also drill down into relevant business dimensions, such as spend category, worker, customer, vendor, and region, and take action immediately.

Unified with Workday Financial Management.

Workday Expenses is part of a single system with Workday Financial Management. When used together, you gain a clear view into your total spend and a deeper understanding about the financial implications of your employees' spending.

Unified with Workday Human Capital Management.

Workday Expenses is part of a single system with Workday Human Capital Management (HCM), allowing you to more quickly and easily deploy Workday Expenses to your workforce. Your organization can also benefit from other Workday features, including worker profiles, organization structures, business processes, and embedded management reporting.

- Single hub for expense tasks and reporting
- Google maps integration for distance calculation
- Default expense items upon upload
- Ability to email receipts to expenses from your inbox and automatically create expense reports

Spend controls and management:

- Applicant and contingent labor expenses
- Expense reports on behalf of external committee members
- Transaction approval and audit history
- Policy compliance audit
- Exception management
- Spend authorizations
- Cash advances
- Spend freezes by organization
- Expense item restrictions
- Per-diem calculations
- Eligibilities and deductions
- Budget checking and commitment accounting
- Override default budget dates
- Ability to automatically identify expense report risks (duplicate expense, incorrect expense item, amount anomaly)

Mobile readiness:

- Use native iPad, iPhone, and Android apps
- Capture and submit expenses, including per diems
- Upload receipt from mobile device camera
- Expense report itemization
- Link expense report lines to travel booking records
- Approve expense reports on mobile devices
- View spend reports and analytics



Email receipts directly from your inbox and utilize Workday AI to scan receipts and create Quick Expense reports.

STREAMLINED USER EXPERIENCE

Self-service	An intuitive, consumer-friendly user experience enables your workforce to easily enter or upload expenses quickly and accurately, as well as submit or approve expense reports with minimal training. Creating expense reports is easy and accurate when you use Workday AI to identify or suggest expense items.
Mobile readiness	Using their iOS, Android, or web-enabled device, every worker can quickly enter their spending on the go for more timely and accurate expense reports. Additionally, employees can upload receipts directly from their mobile devices or email receipts directly from their inbox. Workday AI automates mobile processes with smart defaulting of expense items and automatically creates expense reports from scanned receipts.
Unified	The underlying global core, business process framework, security rules, and workforce information in Workday provide a consistent and centralized foundation for all of your critical business processes.

To learn more about Workday Expenses, visit: https://www.workday.com/en-us/products/spend-management/expenses.html

Reporting and insight:

- Approval and exception notifications
- Embedded analytics during approvals
- Real-time consolidated spend insight
- Drill-down analysis by business dimensions
- Standard reporting library and custom report writer
- Expense management dashboard
- Ability to calculate fields for key spend metrics
- Information export for regulatory reporting

Global core:

- Multilanguage support
- Multicurrency support
- Global consistency and auditability
- Upload local travel and reimbursement rates
- Support for local reimbursement policies
- Complex per diems
- Global credit card formats
- Local vehicle mileage reimbursement rates
- Transaction tax defaulting
- Value-added tax
- Global receipt scanning

Unified with Workday Financial Management and Workday Human Capital Management:

- Rapid deployment and adoption
- Single home page for HR and expenses
- Immediate accounting visibility upon approval
- Single source for your financial data with Workday Financial Management
- Single platform for paying and reimbursing employees when paired with Workday Payroll

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Workday Inventory

Workday Inventory is a cloud-based application that addresses the internal inventory management needs of today's businesses. It provides visibility across the entire inventory process to help organizations strategically manage cash flow, decrease costs, optimize stock levels, and support growth initiatives.

Manage Your Internal Supply Chain

Workday provides an end-to-end solution to manage all aspects of the materials management process for goods and supplies that are used internally. In addition to purchasing and receiving goods in Workday Procurement, Workday Inventory offers the flexibility to store inventory items and track how you use and replenish them. Need to add new inventory sites or more stocking locations, or even restructure the transaction approval business process? It's easy with Workday Inventory.

Comprehensive Counting and Replenishment

Enable physical and cycle counting of items on a predefined basis and reconcile inventory levels based on counts. The flexible Workday framework allows you to generate stock requests by requisition sourcing, inventory replenishment, or ad hoc requests, and automate replenishment with auto-purchase requisitions or stock transfer requests. Workday also supports par inventory, so that you can manage, maintain, and replenish par levels in each par location.

Real-Time Visibility and Accuracy

A key to efficient inventory management is awareness. The modern Workday architecture ensures that your business is always reflected in real time, providing more accurate reporting and analytics about your goods and supplies on hand. This intelligence provides insights into all transactions and associated business dimensions to help drive down costs.

Mobile-First Design

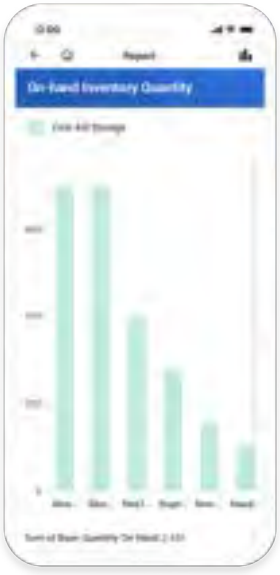
Whether on the floor or on the go, you can complete approval requests, view an actionable dashboard, and perform pick transactions on a mobile device. Mobile is built into the Workday core without the need for additional software or integrations.

Single Enterprise Platform

Workday Inventory is fully unified with financial, employee, and purchasing information. It reduces the number of manual item or process handoffs, and creates transparency across the organization to optimize cash flow and fund business growth.

Key Benefits

- Increase visibility across the entire inventory process, from item stocking to replenishment
- Drive greater cost control through more informed inventory decisions
- Gain efficiencies by understanding how items are consumed with real-time reporting for goods on hand
- Minimize operational risk with configurable business processes that support fully automated put-away, replenishment, and purchase-requisition generation
- Improve staff productivity and accuracy with the ability to perform selected transactions and view real-time dashboards on a mobile device
- Better comply with corporate policies with a full audit trail of inventory accounting transactions



View real-time inventory reports and analytics directly from a mobile device.

STREAMLINED USER EXPERIENCE

Self-Service	An intuitive, consumer-friendly user experience enables your staff to easily enter transactions, create stock requests, and process adjustments. Managers can drill into reports and monitor performance using the inventory dashboard.
Mobile Readiness	From the Workday app for iPhone and iPad, employees can quickly perform pick transactions, approve requests, and view an actionable dashboard.
Unified	The Workday business process framework, security rules, and workforce information provide a consistent, centralized, and global foundation for all of your critical business processes.

WORKDAY INVENTORY

Handle and Transact	• Define and place inventory in storage locations • Issue inventory with or without a stock request • Record and track serial identifiers when issuing inventory • Ensure product traceability with GS1 and HIBCC identifiers • Move and transfer inventory between sites and/or stocking locations • Define and stock par locations • Use bar-code scanning for quicker transaction entry • Track lot numbers and lot expiration dates
Manage and Account	• Define basic attributes with an item master • Value items using the perpetual average costing method • Assign and manage different units of measure • Set up inventory usage types and enable different attributes that can be used on multiple locations • Manage consigned inventory • Create reorder points to replenish stock automatically • Generate and print labels to track locations, receipts, and deliveries • Record item quantities on an ad hoc basis • Issue comparable items when a requested item is out of stock
Report and Analyze	• View on-hand inventory cost, value, and other dimensions • Get real-time consolidated inventory insight • Benefit from a configurable Workday Inventory dashboard • Use drill-down capabilities • Access the standard report library and custom report writer

WORKDAY INVENTORY

Mobile Readiness	• Benefit from a native iPhone and iPad app • Perform cycle counts, par counts, and pick transactions • Create, track, and acknowledge deliveries on a mobile device • Issue/record lot and substitute items • Utilize bar-code scanning capabilities • Approve inventory transactions • View drillable inventory reports
Improved Efficiency with Workday Procurement	• Visibility into entire inventory process, from purchase to replenishment • Single item master used across Workday Procurement and Workday Inventory • Unit-of-measure conversion • Requisitions sourced from inventory • Automatic purchase requisition for replenishment
Unified with Workday Financial Management and Workday Human Capital Management	• Unified user experience • Consistency across data, security policies, and global processes • Streamlined accounting transactions (with Workday Financial Management)

To learn more about Workday Inventory, please visit workday.com/inventory.

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Workday Expenses

Streamline expense management.

Accurate expense management has a huge impact on your bottom line. Travel and entertainment (T&E) continues to be one of the most difficult operating expenses to control, and organizations are looking at ways to further automate and simplify the expense reporting process to benefit both the organization and employees.

While employees want a fast and intuitive way to capture and submit their expenses, back-office teams need a flexible solution to enforce spending policies and identify cost-saving opportunities.

Workday Expenses addresses both of these requirements by providing organizations with a user-friendly experience and enterprise-grade functionality that helps capture, monitor, and control employee spend more accurately.

Manage expenses on the go.

Workday offers an easy-to-use, consumer web-like application, as well as an intuitive mobile experience that allows you to submit and approve expenses on the go from any device.

Employees can email receipts directly from their inbox or scan receipts on their mobile device to automatically populate data on mobile expense reports. From there, Workday AI can accurately read and interpret receipt data to automatically create quick expenses that can be easily added to reports. This not only helps your employees save time when filling out expense reports, but it also increases the accuracy of your expense reporting.

Effectively monitor and control spend.

Eliminate manual paper processes and easily configure expense workflows and approvals. You can also implement spend authorizations and spend freezes to plan for, control, or halt spending. Every transaction is recorded for audit transparency, and embedded analytics helps inform manager approvals and administrative decisions. Additionally, you can automatically identify expense report risks such as duplicate expense, incorrect expense item, and amount anomalies utilizing Workday AI.

Global at the core.

Reduce complexity and cost using a single global expense management application that natively handles international tax rules as well as regional reimbursement requirements. The underlying global core in Workday accommodates local customs and rules, including allowances, currencies, per diems, and vehicle mileage rates.

Key Benefits

Streamlined expense processing:

- Intuitive user experience
- Mobile expense reports and approvals
- Stronger controls through spend authorizations and freezes
- Reduced risk with automated expense error detection
- More-accurate and timely accounting and reimbursements
- Better adherence to global requirements
- Faster settlements

Ease of deployment and maintenance:

- Faster and easier deployment through the cloud
- Unified mobile applications for finance and HR

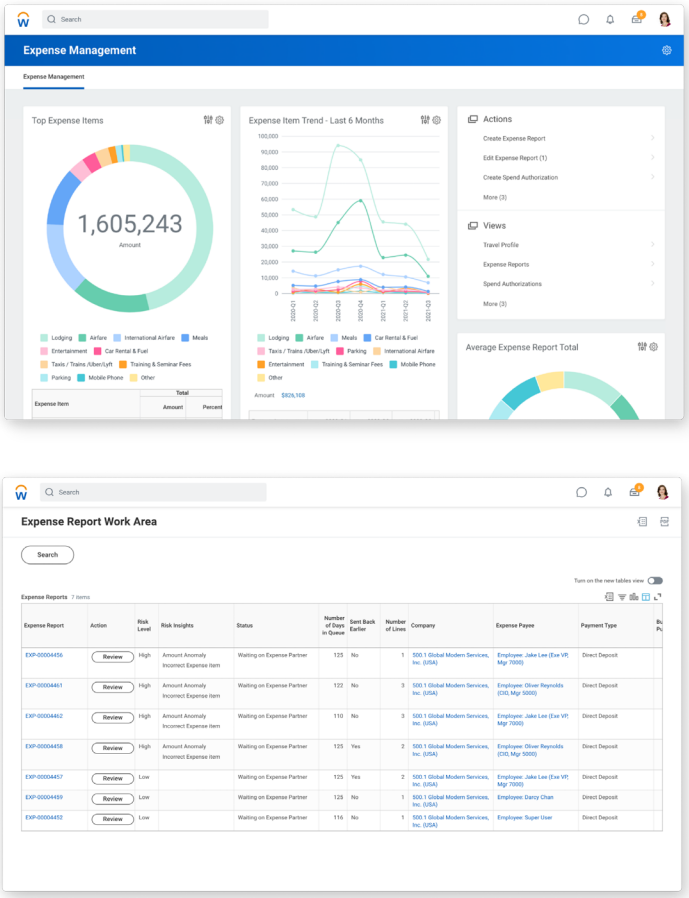
Stronger reporting and visibility:

- Better visibility into actual spend versus budget
- Detailed reporting and the ability to drill down by relevant business dimensions
- Approval cycle analysis
- Complete auditing visibility

Workday Expenses

Streamlined expense processes:

- Intuitive self-service application
- Configurable approval processes
- Packaged credit card integrations
- Configurable instruction text
- Direct deposit reimbursement
- Easy delegation of expense report creation or approvals
- Reimbursement accounts
- Itemization templates



Powerful, real-time visibility and control over organizational spend.

Gain actionable insight.

Actionable insight is the key to developing your spend policies and negotiating with vendors. With Workday Expenses hub, you can easily access your regularly used tasks, unexpensed receipts, and key reports. All approved expense transactions are immediately available to provide real-time visibility into actual versus budgeted spend. You can also drill down into relevant business dimensions, such as spend category, worker, customer, vendor, and region, and take action immediately.

Unified with Workday Financial Management.

Workday Expenses is part of a single system with Workday Financial Management. When used together, you gain a clear view into your total spend and a deeper understanding about the financial implications of your employees' spending.

Unified with Workday Human Capital Management.

Workday Expenses is part of a single system with Workday Human Capital Management (HCM), allowing you to more quickly and easily deploy Workday Expenses to your workforce. Your organization can also benefit from other Workday features, including worker profiles, organization structures, business processes, and embedded management reporting.

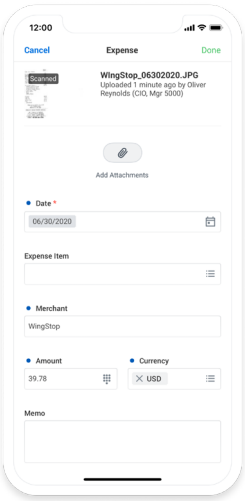
- Single hub for expense tasks and reporting
- Google maps integration for distance calculation
- Default expense items upon upload
- Ability to email receipts to expenses from your inbox and automatically create expense reports

Spend controls and management:

- Applicant and contingent labor expenses
- Expense reports on behalf of external committee members
- Transaction approval and audit history
- Policy compliance audit
- Exception management
- Spend authorizations
- Cash advances
- Spend freezes by organization
- Expense item restrictions
- Per-diem calculations
- Eligibilities and deductions
- Budget checking and commitment accounting
- Override default budget dates
- Ability to automatically identify expense report risks (duplicate expense, incorrect expense item, amount anomaly)

Mobile readiness:

- Use native iPad, iPhone, and Android apps
- Capture and submit expenses, including per diems
- Upload receipt from mobile device camera
- Expense report itemization
- Link expense report lines to travel booking records
- Approve expense reports on mobile devices
- View spend reports and analytics



Email receipts directly from your inbox and utilize Workday AI to scan receipts and create Quick Expense reports.

STREAMLINED USER EXPERIENCE

Self-service	An intuitive, consumer-friendly user experience enables your workforce to easily enter or upload expenses quickly and accurately, as well as submit or approve expense reports with minimal training. Creating expense reports is easy and accurate when you use Workday AI to identify or suggest expense items.
Mobile readiness	Using their iOS, Android, or web-enabled device, every worker can quickly enter their spending on the go for more timely and accurate expense reports. Additionally, employees can upload receipts directly from their mobile devices or email receipts directly from their inbox. Workday AI automates mobile processes with smart defaulting of expense items and automatically creates expense reports from scanned receipts.
Unified	The underlying global core, business process framework, security rules, and workforce information in Workday provide a consistent and centralized foundation for all of your critical business processes.

To learn more about Workday Expenses, visit: https://www.workday.com/en-us/products/spend-management/expenses.html

Reporting and insight:

- Approval and exception notifications
- Embedded analytics during approvals
- Real-time consolidated spend insight
- Drill-down analysis by business dimensions
- Standard reporting library and custom report writer
- Expense management dashboard
- Ability to calculate fields for key spend metrics
- Information export for regulatory reporting

Global core:

- Multilanguage support
- Multicurrency support
- Global consistency and auditability
- Upload local travel and reimbursement rates
- Support for local reimbursement policies
- Complex per diems
- Global credit card formats
- Local vehicle mileage reimbursement rates
- Transaction tax defaulting
- Value-added tax
- Global receipt scanning

Unified with Workday Financial Management and Workday Human Capital Management:

- Rapid deployment and adoption
- Single home page for HR and expenses
- Immediate accounting visibility upon approval
- Single source for your financial data with Workday Financial Management
- Single platform for paying and reimbursing employees when paired with Workday Payroll

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Workday Procurement

Indirect spend can make up a significant portion of your corporate spending. In today's business environment, building a world-class procurement organisation requires you to drive cost savings and implement best practices in spend management, all while reducing risk and improving inefficiencies with automation. That's where Workday comes in.

Workday addresses the unique requirements of both goods and services spend, and doesn't require you to deploy multiple systems to manage it. From requisition to payment, Workday Procurement provides a single system for the procure-to-pay process and is built for today's global businesses.

End-to-end goods and services procurement

Workday Procurement enables you to bring user profiles, business process controls and analytics into one system, streamlining the entire indirect procurement process. With everything in one place, you can establish consistency and gain real-time visibility into spending trends across the organisation.

Self-service supplier management

Extend the Workday experience to your suppliers through the supplier portal where they can maintain their personal data and specify their goods and services. Suppliers can also view their purchase orders (POs), view and load catalogues, view and respond to requests for quotes (RFQs), and view and create PO and non-PO invoices. This allows you to automate invoice processing and payments while improving supplier maintenance.

Supplier punch-out

Connect to the supplier website or network of your choice to access a broad, open community of suppliers. Select the items you would like to purchase and add them to your shopping cart to create a requisition from the punch-out session. You can select from preconfigured punch-out suppliers in Workday or use the supplier network punch-out connector to access other suppliers that support the punch-out standard, allowing you to access and procure goods from multiple catalogues. Additionally, Workday integrates directly with select third-party catalogues to eliminate the need to punch out.

Key Benefits

- Single comprehensive system for indirect spend management
- Streamlined procure-to-pay process
- Consumer-friendly interface for high self-service adoption
- Reduced "maverick" spending
- Potential savings identified through better spend insight
- Stronger internal spend policies and adherence
- Consistent global spend controls

Key Features

- Cloud-based system for easier maintenance and improved cost-effectiveness
- Multi-supplier punch-out and integrated marketplaces for seamless purchase requisitions
- Reduced errors and automated processes with Workday AI
- Management spend reporting with multidimensional drill down
- Consistent global spend controls

Results

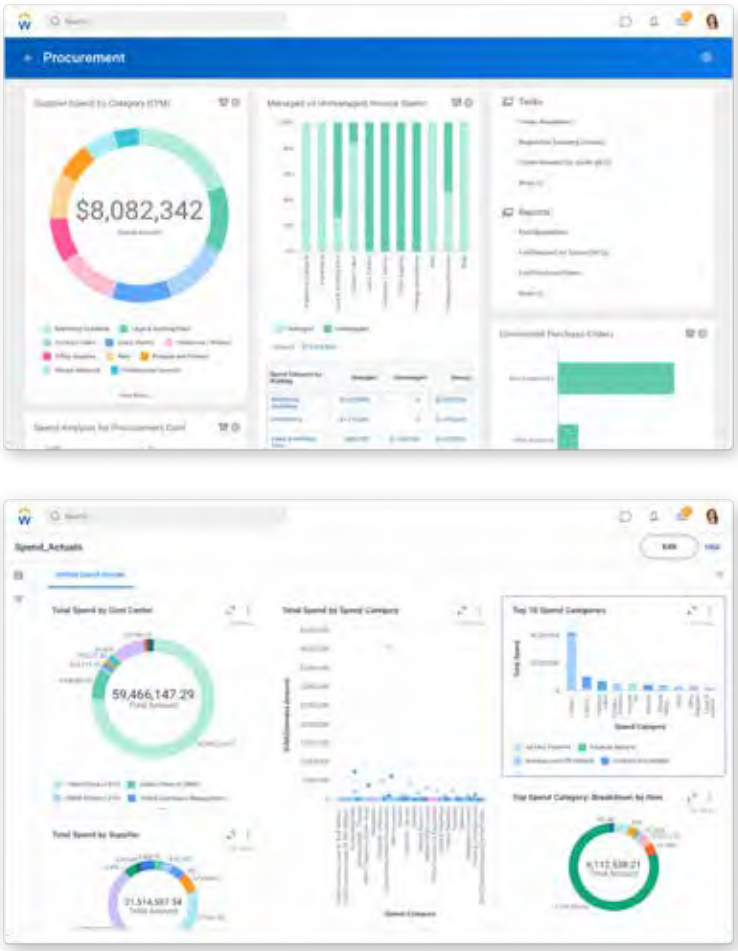
- Unum: 86% reduction in requisition-to-PO cycle time; 38% improvement in on-time payments
- Broward College: 189% ROI; 50% reduction in questionable spend
- The Met: Saved 220% of its set goal and saw a 15% ROI from projects, while also decreasing approval time by 84% and eliminating 24 business process steps

Supplier contracts

Use your company procurement policies to enforce contractual agreements with preferred suppliers. With Workday, you can configure business processes within your procurement practice to validate against pricing thresholds, and automatically generate invoices and POs from a contract or instalment schedule. Combine these capabilities with powerful analytics on contractual spend to realise better control and standardisation.

Single system for source to pay

With the integrated Workday Spend Management solution, you can streamline your source to pay processes. Workday enables you to measure results, manage risk and automate processes all while driving cost savings and increasing control over your spend. Combining Workday Strategic Sourcing and Workday Procurement provides one system to manage your supplier spend.



Gain insight into suppliers and organisational spend directly from the procurement dashboard and spend actual discovery board

Real-time spend insights

Workday gives you the details on the who, what, when, where and why in every transaction. With the ability to capture and analyse data in business terms, Workday allows you to better understand your organisational spend. These reporting dimensions, known as worktags, provide deeper and richer reporting capabilities than traditional procurement systems. They are always drawn directly from transactional data in real time – not a delayed business intelligence repository.

Global controls

Workday gives you the power to establish consistent security and controls across your global organisation. Ensure that every type of requisition adheres to the rules and approvals set up for the organisation. Specialised approvals or validation needed by any part of your organisation can be provided without a separate deployment. Even with employee and manager self-service, each person has visibility and rights according to their role and permissions within the organisation.

One system with Workday Financial Management, Workday Strategic Sourcing and Workday Human Capital Management

Workday is the only provider of enterprise cloud applications that give you spend management, financial management and human capital management in a single system. As a result, your organisation can rely on a real-time single source of truth. When Workday Procurement is used with Workday Financial Management, the financial and accounting impact is instantaneous. When used alongside Workday Strategic Sourcing, you can deliver increased spend under management all while reducing your supplier risk. When combined with Workday Human Capital Management, Workday Procurement immediately updates any changes within your organisation that affect employee roles or approvals. In addition, you'll realise consistency across your data, security policies and global processes for even greater efficiency, management and control.

WORKDAY PROCUREMENT	
Goods Procurement	• Ability to create and issue requisitions and RFQs • Item catalogue search • Side-by-side item comparison in requisitions • Multi-supplier punch-out • Buyer console for visibility and control • Specify ship-to and deliver-to information at the line level on procurement documents • Invoice creation from PO or receipt • Internal services provisioning • Easily check the status on requisitions and invoices with Workday Assistant • Seamlessly search across internal catalogues and third-party sites • Utilise Workday AI for spend category recommendations
Services Procurement	• Use service coordinator console for manual sourcing • See project-based milestones, deliverables and tasks • Fill internally or through supplier PO • Task log entry by supplier or internal • Create invoice from PO or task log
Supplier Management	• Allow prospective suppliers to self-register through an external website • Collaborate with and manage suppliers using the supplier portal • Define priority-ranked suppliers for purchase items • Categorise suppliers by various classifications, such as minority-owned business (MBE), foreign vs domestic and more • Track and manage back orders from suppliers • Report on detailed change history across supplier records
Supplier Contracts	• Record and enforce agreements with preferred suppliers • Implement contractual spend • Automatically generate invoices/POs from contract or instalment schedule • Define contract renewal terms and notifications before contracts expire • Partition suppliers by company • Amend supplier contracts
Integrations	• EDI supplier integrations (EDI 810, 850, 855 and 856) • cXML format for POs and invoices • Integration templates • Supplier network connector • Web services to support integrations • Procurement integrations work area displays errors and allows corrections
Spend Control	• Supplier invoice retention • Configure spend freezes and budget checking • Requisition templates • Configurable approval processes • Requisition consolidation into a single PO • PO change orders • Two- and three-way matching

WORKDAY PROCUREMENT	
Reporting and Insight	• Embedded analytics during approvals • Real-time, consolidated spend insight • Reporting for contract history including any amendments • Standard reporting library and custom report writer • Configurable procurement and supplier accounts dashboards • Discovery boards display key insights, including view of company spend across key transactions and supplier diversity data • Buyer hub for visibility into status and tasks
Global Readiness	• Intercompany transaction documentation for supplier invoices • Requisitions in foreign currencies • Multi-language and available translations • Global consistency and auditability • Business processes configurable for specific regional requirements
One System with Workday Financial Management	• Immediate capture of accounting impact • A single settlement engine across all financial functions • Budget checking and commitment accounting
One System with Workday Inventory	• Automatic purchase requisitions for replenishment • Common item master with inventory • Source requisition from inventory • Unit of measure conversion
One System with Workday Strategic Sourcing	• Simplify workflow between sourcing and procurement functions • Onboard suppliers and maintain a single supplier master • Third-party integrations with key fraud, security, financial and sustainability data providers for risk scoring • Author and manage contracts across all stages of your supplier relationship • Create a requisition in procurement once a supplier is awarded
One System with Workday Human Capital Management	• Visibility into full-time and contingent workers • More accurate insight into workforce capacity, capabilities and costs • Automatic business process updates with organisational or worker role changes

To learn more about Workday Procurement, visit: workday.com/procurement

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Workday Strategic Sourcing.

It's no secret that sourcing and procurement are now critical in the operation of modern enterprises. So why are these organizations still reliant on manual processes and legacy tools? To compete in today's world, sourcing professionals need a platform that streamlines supplier workflows, breaks down department silos, and makes it easy for business users to engage and align sourcing with overall business strategies.

That's where Workday comes in. Workday Strategic Sourcing is a collaborative, cloud-based solution that makes sourcing teams a truly strategic arm of the business. It provides visibility throughout the entire source-to-contract process to help maximize savings and reduce risk in order to protect your business. Customers globally have chosen Workday Strategic Sourcing to manage spend efficiently and impactfully, and drive significant business outcomes.

Collaborate better and engage with the business.

Engaging early in the sourcing process for requirements gathering, supplier discovery, and market evaluation is key to successful project outcomes. Workday Strategic Sourcing enables this through an easy-to-use interface and customizable intake forms, enhancing stakeholder collaboration. It offers a centralized portal that simplifies and streamlines project requests, automatically directing them to the appropriate sourcing owner. This alignment with business needs ensures impactful sourcing outcomes and solidifies the sourcing team's role as a strategic partner.



Gain visibility into sourcing projects and key savings information from the pipeline overview dashboard.

Key Benefits

- Centralize and streamline the project intake process for enhanced collaboration and compliance
- Manage sourcing projects effectively, linking spend and savings to profitability
- Create and execute RFPs, RFIs, and RFQs efficiently, leveraging templates and intuitive tools
- Conduct and manage reverse auctions to maximize savings
- Compare supplier bids with optimization tools for informed decision-making
- Establish a single source of truth for all contracts to related documentation to operationalize obligations
- Streamline supplier onboarding with efficient data capture, and utilize third-party risk management integrations for ongoing data validation and compliance
- Maximize supplier impact and master negotiations by streamlining performance reviews and leveraging tools for comprehensive bid comparisons, scenario modeling, and savings analysis
- Leverage Workday AI and ML to increase operational efficiency and accelerate decision-making processes

Results

- Streamlined processes save time and boost productivity
- Data-driven insights enhanced strategic decision-making
- Substantial cost savings achieved and contributed directly to profitability
- Risks proactively managed and compliance ensured across sourcing activities
- Improved supplier relationships and performance, leading to a resilient supply chain

Track project execution and savings.

Companies today need enterprise-wide visibility of their spend and sourcing projects to drive transformation and meet savings targets—and Workday Strategic Sourcing delivers. Manage, prioritize, and track all sourcing projects in one place to tie sourcing activities to business impact. Optimize category planning and track progress toward business goals via intuitive dashboards and reporting.

Simplified sourcing with limitless impact.

Say goodbye to cumbersome spreadsheets and email chains, and hello to strategic, collaborative sourcing. Workday Strategic Sourcing makes it a breeze to collaboratively build and execute sourcing events. Build RFPs, RFIs, and RFQs—including questionnaires and pricing sheets—in minutes, and leverage a single view into supplier bid responses. By centralizing your entire sourcing operation, you can more easily collaborate with suppliers and facilitate team evaluations for bid responses to maximize business impact.

Bigger bottom-line impact with reverse auctions.

Modern reverse auctions are integral tools for world-class sourcing organizations. Through standardization and automation, they fortify supplier selection processes while giving the business powerful data, collaboration capabilities, and complete visibility into the auction lifecycle.

With Workday Strategic Sourcing, you can create a transparent and competitive environment that gives suppliers visibility into how they compare with other bidders. Leverage reverse auctions in your sourcing process and drastically reduce time spent negotiating by automating the auction process.

Optimize pricing with data-driven negotiations.

By utilizing a data-driven and analytical approach to negotiations, sourcing can level the playing field between buyer and supplier. Yet, collecting and analyzing the information can be time-consuming and often prone to errors. You need the right data at the right moment so you can adapt on-the-fly to achieve the best outcome.

Workday Strategic Sourcing lets you collaborate using facts, and ultimately change the tone of pricing conversations with suppliers. Easily analyze multiple factors and constraints to determine the best supplier choice, and model scenarios to understand the biggest impacts on savings targets.

Manage contract obligations in one place.

By establishing a centralized hub and proactive alerts for all contracts, sourcing teams can optimize every contract, improve its leverage, and mitigate risk with suppliers. Without a widely adopted contract management solution, sourcing teams lack the control they need to empower the business.

Workday Strategic Sourcing helps eliminate contract chaos and inefficiency to drive value and productivity. With Workday, you can greatly reduce time spent authoring, executing, and finding contracts through integrations with Microsoft Office 365, DocuSign, and Adobe Sign, along with powerful machine learning (ML) capabilities, and a clause library. By providing comprehensive visibility into contract and renewal information, including views of all contracts with each supplier, you can prevent contract delays that erode cost savings, and keep stakeholders informed of approval status along the way. you can make proactive decisions and operationalize obligations to realize the full contract benefits.

Maximize supplier impact and innovation.

Ongoing risks and requirements continue to add complex challenges for keeping suppliers in compliance with company standards. Owners across the business must proactively identify risks, monitor supplier performance, and validate compliance. But only with an effective supplier engagement strategy can your enterprise realize the full impact of these relationships

Workday Strategic Sourcing streamlines essential supplier data collection and performance assessment. Templated and configurable forms, along with automated workflows for supplier form routing, simplify the capture of data and the review and approval process, all while providing and storing the necessary information. Integrations with third-party risk management tools proactively validate and monitor supplier data to mitigate supplier risk. The system retains completed forms along with an audit trail of the review process.

Workday Strategic Sourcing also makes it effortless to improve supplier relationships and performance by providing one centralized view into the supply base, allowing you to monitor performance, collaborate on ongoing business reviews, and maximize innovation.

Connect your applications with ease.

Disjointed sources of data result in low confidence in data quality and operational challenges for the enterprise. By integrating supplier and internal data sources through a robust API, procurement can ensure data consistency while streamlining business processes. Workday Strategic Sourcing makes it simple to connect your applications, ensuring data integrity, secure authentication, and a seamless experience. Connect to existing data management systems such as Workday Financial Management and Workday Procurement, and other enterprise resource planning (ERP) solutions easily and securely.

To explore how Workday Strategic Sourcing can help you, please contact sales.

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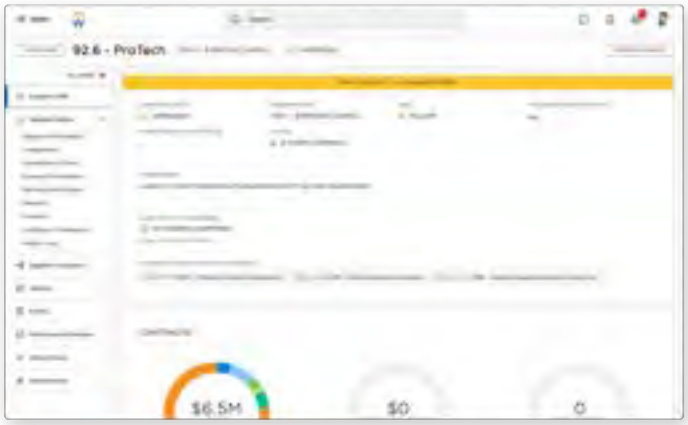
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Datasheet

Workday Strategic Sourcing: Supplier Management.

Sourcing teams often struggle to manage an extensive network of suppliers, each bringing unique challenges in supplier risk, performance, and relationship management. Without a comprehensive and centralized supplier management system, these issues lead to inefficient supplier onboarding, ineffective risk assessments, and challenges in maintaining consistent and up-to-date supplier data. As a result, teams face increased administrative burdens, lack of visibility into supplier risks, and difficulties in optimizing supplier relationships for cost and performance.

Recognizing these challenges, Workday Strategic Sourcing Supplier Management offers a transformative solution to manage the entire supplier lifecycle. It simplifies supplier onboarding, enhances risk assessment processes, and provides effective tools for ongoing performance optimization. This integrated approach empowers teams to shift from a reactive to a proactive strategy in managing supplier relationships—strengthening the supply chain, and enhancing organizational efficiency.



Simplify onboarding, supplier reviews, and performance tracking through an intuitive interface and collaborative workflows.

Key Benefits

- Streamline supplier onboarding and risk management processes for enhanced efficiency and collaboration
- Validate and monitor supplier data proactively through third-party integrations for continuous risk mitigation
- Centralize supplier data for easy access and comprehensive reporting and performance evaluations
- Collaborate with stakeholders on supplier performance assessments using forms and transparent scorecards
- Maintain seamless synchronization between supplier master data and onboarding records for consistent accuracy

Results

- Automate supplier onboarding and validation tasks for improved efficiency
- Actively assess and monitor supplier performance to mitigate potential risks
- Eliminate administrative bottlenecks for a focus on strategic supplier engagement
- Enhance overall supply chain resilience with high-performing suppliers
- Maximize supplier impact while managing costs for a balanced supply base



Automatically validate and continually monitor supplier data against third-party sources for proactive risk management.

CORE CAPABILITIES: Supplier Onboarding	
Configurable Templates	Create a variety of supplier forms using flexible templates.
User-Friendly Project Flexibility	Add one supplier with many forms or many suppliers with one form.
Integrated Risk Management	Assess and review supplier data with risk scorecards and automate ongoing supplier data validation through integrations with third-party risk management solutions.
Simplified Approval Process	Configure approval groups to include the right stakeholders at the right time.
Custom Compliance Surveys	Evaluate supplier responses and take immediate corrective action.
Centralized Supplier Forms	Integrate with master supplier profile so all essential forms are in a single location.
Simplified Supplier Profile	Get one view into the current status and expiration dates for supplier risk and compliance forms.
Integrated Reporting	Create configurable reports to assist with audits, compliance requirements, and quality control.
Unified Data Source	Seamlessly sync supplier master data and onboarding records between Workday Supplier Management and Workday Financial Management and Workday Procurement for a single source of truth.

CORE CAPABILITIES: Supplier Performance	
Streamlined Reviews	Collaborate and collect feedback from stakeholder scorecards.
Action Items	Drive value from supplier relationships.
Collaborative Scoring	Connect sourcing teams and stakeholders to rate, score, and create performance plans for suppliers.
Master Templates	Measure compliance with organizational policies using scalable master templates and compare results.
Supplier Feedback and KPIs	Let suppliers fill out key KPIs and provide 360 feedback.
Visibility Across Suppliers	See risks, issues, and plans across suppliers, categories, and geographies via supplier profiles.

To explore how Workday Strategic Sourcing Supplier Management can help you, contact sales.

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Workday Professional Services Automation.

The knowledge economy gives professional services organizations a unique opportunity to improve their talents and operations to maximize value for customers. However, as projects grow in scope and teams expand, so do the risks of cost overruns and mismanagement.

Workday Professional Services Automation (PSA) helps you manage the entire lifecycle of client-facing billable projects. Your sales, resource managers, project managers, operations/delivery, and finance teams gain a single source of truth to view and act on every type of data. Rich talent intelligence helps you match the right people with the right project, while flexible billing and revenue recognition enables you to confidently accelerate business transformation. And since all Workday applications across finance, HR, and operations are part of a single system, your entire company can boost collaboration, increase efficiency and insight, and improve customer service.

Workday PSA products and capabilities.

Workday Human Capital Management.

Use Workday Human Capital Management (HCM) to recruit, manage, engage, and retain your workforce with a seamless user experience and dynamic analytics. Stay ahead of the retention curve with predictive talent insights.

Project and resource management.

Get a holistic view of your staffing needs and project status from a centralized resource management dashboard. Define roles and shop for talent inside or outside of your organization. Enable quick and easy staffing through intelligent resource management powered by machine learning. Forecast resources and projects for more-efficient utilization and profitable delivery.

Project financials.

Workday PSA is part of a single system with Workday Financial Management for easier and more accurate customer billing, revenue recognition, and financial analysis. Improve financial management with built-in support for new revenue recognition standards (ASC 606/IFRS 15) and dual reporting requirements.

Key Product Areas

Human Capital Management

- Recruiting tied to projects
- Performance management
- Skills and competencies
- Workforce planning and analytics

Services CPQ

- Services quoting (pricing and estimating)
- Automated proposal creation
- Automated approval workflow
- Resource demand visibility
- Automated draft customer contract in project billing

Project Execution

- Project management
- Resource management
- Time tracking
- Expense management

Project Financials

- Project billing
- Revenue recognition
- Project costing and accounting
- Budgeting and forecasting

Reporting and Analytics

- Financial reporting
- Operational reporting
- Talent reporting

Workday Services CPQ.

Workday Services CPQ (configure, price, quote) works in conjunction with Workday PSA to create projects and contracts, providing earlier insight into resource demand and streamlined billing based on contract terms. Automatically generate services documentation (SOWs, ROMs, executive summaries, or proposals). Services CPQ also completes our opportunity to cash process from quoting/pricing, contracts, projects, billing, revenue recognition, collections, reporting, and revenue planning.

Project billing.

Provide insights into flexible billing rules, exceptions, markup, and write-off to minimize revenue leakage. Various billing models are supported including subscription-, usage-, and project-based; time and materials; fixed-fee; prepaid; milestone; percent completed; and more.

Expense management.

Email and scan receipts to automatically add comprehensive expense data through mobile devices. Minimize project overrun with the ability to create, find, edit, submit, and analyze expenses on the go. Manage the expenses of personal transactions on corporate credit cards.

Time tracking.

Capture project time easily by entering and approving multiple projects at once. Support daily, weekly, and monthly resource forecasts and project labor budgeting by hours and amount. Leverage consolidated time reporting and configurable PSA reporting to increase utilization and minimize overrun.

To explore how Workday Professional Services Automation can help you, please visit: workday.com/psa

Key Benefits

- Create quotes and proposal documentation, manage resources, create projects, and billing all in one system.
- Leverage rich talent data and one system to put the right people on the right projects.
- Increase efficiency in resource utilization, project billing, revenue recognition, time tracking, and expense management from any device, anytime.
- Drive better decision-making across HR, services, and finance with a single source of truth for actionable data and embedded analytics.
- Use built-in support for multiple business models (project, subscription, usage-based, and so on) and new revenue standards.

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Datasheet

Workday Services CPQ

Configure, Price, Quote

Workday Services CPQ is designed for services specific quoting as part of our Professional Services Automation (PSA) solution which unifies your opportunity to cash process–delivering automation, communication and transparency from the quote stage from your CRM into downstream PSA delivery. And it improves quoting accuracy which drives profitability across your entire services business.

Why is this important? People, new business opportunities and margins are in constant flux as you manage your services projects and to be effective you need to be agile. Despite all the complexity associated with managing multiple projects, most organizations relied on manual spreadsheets and legacy tools to fulfill the need for accurate estimation and quoting. This elongates sales cycles, and creates misalignment between what is sold and delivered, leading to unforeseen costs, revenue leakage, and margin impacts.

To best serve the customer and improve the opportunity to cash processes, Workday provides the business with a PSA solution that brings historical actuals and accurate margins, visibility, and configurability into the quoting process and unites sales, resource management, services delivery and finance together on a single platform.

How does Workday Services CPQ work?

Workday Services CPQ allows sales operations teams to create multiple quotes for services opportunities, leveraging data from their CRM system and Workday's PSA solution. Services CPQ provides templatized service catalog items to standardize quoting, creating a consistent quoting experience that leads to more accurate scoping and pricing.

While most CPQ solutions are designed to quote products, Workday Services CPQ is uniquely designed to address quoting service-centric scenarios, including generating quotes based on roles, phases, tasks, rates, and other items specific to the services business.

Other items that should be considered in the quoting process, due to downstream impacts, include project worker rates, project worker availability, project duration, and non-labor items such as expense lines (including travel), sales items, and third-party costs.

Simultaneously, Workday Services CPQ creates key quoting documents for delivering customers documents (e.g., MSA, Order Form, SOW).

Key Benefits

- **Improved visibility** into project margin and profitability while keeping the customer at the center
- **Optimize and standardize** the quoting process to expedite the creation of accurate quotes and proposals
- **Deeper insights** across your business and uncover new opportunities around talent, demand and margins

Maximize Margin and Increase Operational Efficiency

As the market continues to evolve, services businesses are looking for ways to maximize margin, improve resource optimization, and increase operational excellence. To do that, they need to closely align key areas of their business: sales, services, delivery, and finance. These groups tend to use different tools that are not aligned. Historically, Sales uses CRM, services and delivery has used PSA or other manual disparate systems and the finance teams are left manually entering data into their ERP systems. Each one of these groups independently try to maximize margin and profitability, but it's impossible to attain without these groups working together. With Workday, traditionally siloed teams work together on a single platform that provides complete transparency from quoting to delivery, giving you real-time insight into profitability.

Workday's Services CPQ is the perfect bridge to bring together CRM and Workday's Enterprise Management Cloud Platform, PSA, Human Capital Management (HCM) and Financial Management—providing a single source of truth with the system of record so you can manage your people, projects, and profits in one system.

Pricing and costs are an incredibly dynamic aspect of any organization. Since labor information is in PSA, Workday can help you more accurately understand costs and price projects accordingly. Quote data is then served up for all downstream systems that comprise the opportunity to cash business process. Once a quote is approved, the downstream steps can be fully automated, including dynamically creating projects, softbooking resources, forecasting, budgeting and billing leading to greater operational efficiency end to end.

Complete insights and data that improve decision making.

Housing all the data for potential or signed quotes in one system minimizes errors, removes redundancies and lets different team members know where a deal is in the opportunity to cash journey. And it gives customers visibility into resource demand earlier. When it comes to changes that impact the quote or function, users can adapt quotes as needed.

With all of your opportunity to cash data in one system, users gain transparency into your entire services business and the ability to track project financial health at any given point. This allows for greater collaboration across operational teams to deliver a successful project with accurate staffing to maximize profitability for the business and achieve improved customer satisfaction. With full transparency the delivery team can anticipate and plan for future demand to create resource forecasts based on the quote pipeline. This results in internal operational excellence across the project, and less friction between teams.

Key Features

- Integrated with CRM systems
- Centrally controlled quoting
- Automated proposal and automated contract creation
- Resource demand visibility
- Streamlined opportunity to cash process

Key Capabilities

- **Quoting**: Quoting will be centrally controlled based on your defined business processes, rules, pricing, and document content.
- **Automated Proposal Creation:** Customer-facing and internal documentation will be dynamically created (i.e. proposal, SOW, ROM, MSA, etc.) based on the configuration of the quote.
- **Automated Approval Workflow:** Quotes will be automatically sent for approval to the appropriate people based on your business metrics , resulting in faster approvals and improved collaboration.
- **Resource Demand Visibility:** Approved quotes upon approval, will automatically set up the quoted roles with the associate level of effort over time, as well as all your non-labor items providing you early access to managing your resource demand in Workday Projects.

Workday Services CPQ is uniquely positioned to provide end-to-end insights into services quotes and the associated documentation to simplify the professional services automation processes.

Workday Services CPQ accurately captures and presents pricing with the associated customer documents, streamlines approvals, provides early access into resource demand planning and overall insights into the entire project lifecycle spanning across quoting, resource management, project planning, billing, revenue recognition, contracts and more.

For a holistic view of the opportunity to cash business process, Workday Services CPQ provides the key to organizational success and improved margins. A transparent CPQ approach reveals the quantitative operational insights behind the real-time data, leading to a multidimensional picture of the opportunity to cash customer experience. This empowers leaders to take measurable actions, develop a highly functional professional services automation process which correlates to successful client relationships and improved business outcomes.

To learn more about Workday Services CPQ: the only full platform CPQ software built for services organizations, visit **Workday Services CPQ**.

Workday Applications

Workday Financial Management

- Accounts Payable
- Accounts Receivable
- Assets
- Audit
- General Ledger
- Revenue Management

Workday Human Capital Management

- Absence
- Benefits
- Career Hub
- Skills Cloud
- Talent Management

Workday Professional Services Automation

- Expenses
- Project Billing
- Project Billing Rate Sheet
- Project Hierarchies
- Projects (including opportunity projects)
- Project Phases
- Project Roles
- Project Standard Cost Rate Sheet
- Sales Item/List item much be marked as “Quotable”
- Time Tracking

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Workday Adaptive Planning.

Financial planning.

A highly interactive user interface for self-service reporting that lets you visualize the data and see the impact of your changes instantly. Workday Adaptive Planning provides budgeting, forecasting, reporting, and analytics for organizations of all sizes, with industry-leading usability and the security, scalability, and flexibility required for complex planning. We help people do their best work and help teams operate with agility.

Recognizing that the best plans involve the people closest to the day-to-day business, we built a powerful planning technology platform so you and your colleagues can gain deep insights, make more timely decisions, and manage more efficiently with solid, integrated plans. We enable complex financial models without the burden of managing legacy on-premise systems or massive spreadsheets. And we save finance teams the mind-numbing, error-prone task of manually consolidating data.

Workday Adaptive Planning makes it easy to manage, report, and analyze business performance. And our Elastic Hypercube Technology gives you the flexibility to scale without sacrificing ease of use.

Industry-leading usability.

In business, everybody plans. In large corporations, planning processes span a range of finance and operations teams as well as users from a complex ecosystem of departments, business units (BUs), regions, and countries. Workday Adaptive Planning broadens planning with industry-leading ease of use that accelerates adoption and drives engagement across finance teams, operations, and business units. By engaging finance and non-finance users in a collaborative, active planning process, you can create plans aligned with your organizational goals, ultimately delivering better and more timely decisions.

Key Benefits

- Flexible modeling that lets you adjust dimensions as business conditions change, for what-if scenario modeling on the fly
- Enterprise-wide planning capabilities that enable organizations to orchestrate planning and performance at local and corporate levels
- A single data source across the organization for the insights and confidence needed to make better decisions faster

Built for business.

Many systems take a long time to deploy. Once deployed, changes to structures, reports, and analysis typically require dedicated IT resources to support business users' needs, limiting agility and consuming IT resources. With Workday Adaptive Planning, finance and operations teams control their models, processes, dashboards, and reporting with the drag-and-drop functionality that doesn't require coding or scripting—or much support from IT.

Adapts to change.

Businesses need the flexibility to adapt quickly to change, but traditional planning systems aren't that agile. Workday Adaptive Planning is designed for flexible modeling of functional planning and easy scenario planning so models and plans can continuously evolve as markets and the business change. Now companies can bring together workforce planning, operations planning, project-based planning, and financial planning all within a single active environment.

Faster time to value.

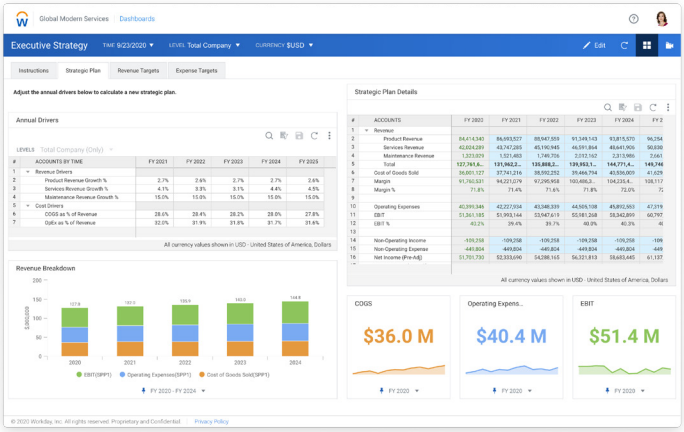
Using the intuitive drag-and-drop modeling and reporting interface in Workday Adaptive Planning, organizations can implement their new planning environment quickly and achieve value sooner. Most enterprise-scale customers deploy their first phase within six months. These rapid deployment cycles reduce project risk and free teams to develop more sophisticated models. Our approach includes end-user validation along the way so that user acceptance testing (UAT) is a non-event.

Trusted, scalable technology platform.

Workday Adaptive Planning is an in-memory computing technology platform designed for multidimensional modeling, reporting, and analysis. Supercharged with the patent-pending Elastic Hypercube Technology, it enables granular and complex planning and reporting by any number of critical business dimensions (customer, channel, product, regions, and more), and by day, week, or other time period. The technology platform also enables unlimited what-if analyses to assess the opportunities and impact of potential changes to the business.

Elastic Hypercube Technology enables companies to manage large, data-intensive models without compromise using:

- Extremely large-scale models with quintillions (10^{18}) of cells
- Unlimited dimensions and unlimited dimension values
- Unlimited planning scenarios
- Rapid analysis, comparison, and reporting without cumbersome setup or additional cubes



Dashboard example with expense plan data.

Federated planning domains.

From corporate finance to operating departments and business units, Workday Adaptive Planning enables groups to plan their own domains. Individual plans come together into a holistic, fully linked corporate plan. What's more, each planning domain can have its own comprehensive model based on the planning cadence of its part of the business. This architecture of federated planning domains mirrors the organizational structure of complex enterprises, aligning with how organizations manage data access and control. Federated planning domains enable corporate finance to orchestrate planning and performance at the local and corporate level. This empowers departments and business units to model, plan, and report at levels specific to their needs.

Open technology platform for all your data.

As you plan across your organization, you need data from all your transactional and operational systems. Workday Adaptive Planning is system-agnostic, seamlessly integrating with ERP, CRM, HCM, and BI systems so planners not only see key business metrics to understand how they got here and why, but also use this past performance to drive plans and forecasts for where they're going.

To learn more about Financial Planning, visit: https://www.workday.com/en-us/products/adaptive-planning/financial-planning/overview.html.

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Workforce planning.

Workforce planning has become an essential capability for organizational adaptability, empowering HR leaders to plan for their organization's workforce while staying in sync with financial plans to achieve wider business goals. Yet for most companies, having the right tools for successful workforce planning is still a work in progress. Many organizations currently use outdated, complex, and clunky legacy software, or have settled for error-prone spreadsheet processes that can't keep pace with rapidly changing business. But now there's a better way.

Workday Adaptive Planning offers a promising path forward. You get the flexibility and power to take your workforce planning to the next level, enabling HR to collaborate effectively with finance and key business partners while allowing functional and business unit leaders to plan the way they need to.

Powerful modeling and scenario planning across business units.

With Workday Adaptive Planning, you can create scenarios and standardize workforce plans across complex and diverse business units. Manage a single strategic workforce model that distributes across your entire enterprise while also building specific business and revenue models for individual business units.

With driver-based, what-if scenarios on how to evolve your workforce, you can better align your people with your corporate plan through top-down or bottom-up workforce planning processes, or both. And you get clear visibility into your workforce composition and cost with automated allocation rules. Drill deep into data across dimensions such as job level, department, job family, skills, projects, and locations. Break down FTE counts compared to contract workers and with a single click, factor in key global and local business drivers and assumptions that can impact your workforce needs.



Get a complete view of your workforce.

Key Benefits

- Improved data accuracy, consistency, and completeness, resulting in cost and time savings.
- Enhanced collaboration and data insights between HR and finance teams.
- Single source of truth for HR data.
- Holistic view of workforce planning and workforce driver-based scenario planning including hiring, transfers, retention, salary, and more.
- Quick and agile decision-making among senior leadership teams.
- Ability to identify workforce skills gaps and then model, plan, and execute the fastest way to address those gaps in real time.

"Workday Adaptive Planning will help accelerate our journey from traditional headcount planning to a strategic workforce planning process, enabling us to efficiently manage headcount and align human capital with business needs.

Kenneth Ruch
AVP of HR Committee Governance, People Analytics, and Organization Design, Nationwide Insurance

Make workforce planning a team effort.

Workforce planning should be agile enough to become a team effort among HR and finance, and their business partners. Workday Adaptive Planning provides the framework, shared data, and workflow to enable greater collaboration on dynamic, flexible workforce plans.

For many companies, it's difficult for their HR team to access forward-looking hiring plans because it is often only in the loop when job reqs get opened. Workday Adaptive Planning for the workforce fills this gap with full visibility into hiring plans—both short- and long-term—so all stakeholders can collaborate in real time.

Bridging to finance, you can now easily link workforce plans to financial models with up-to-date headcount plans and related costs. This dramatically reduces the risk of errors and frees up time previously spent on low-value-add data consolidation tasks to focus on workforce strategy. Easily share plans as they develop via dashboards and self-service reports to get feedback and buy-in. And because Workday Adaptive Planning lets users choose between a web interface familiar to spreadsheet users and a Workday Adaptive Planning-connected Excel worksheet, it's much easier to get ongoing adoption from those still clinging to spreadsheets.

Workflow management that keeps everything on track.

Traditionally, planning has been done via email, offering workers little visibility into the overall plan and no easy path to completion. Now you can keep workforce plans and budgets in sync with financial plans in real time. Built-in workflow allows managers to enter, review, and approve plans and budgets. Meanwhile, planning administrators can track tasks, user discussions, and cell notes to monitor changes and issues with a powerful audit trail.

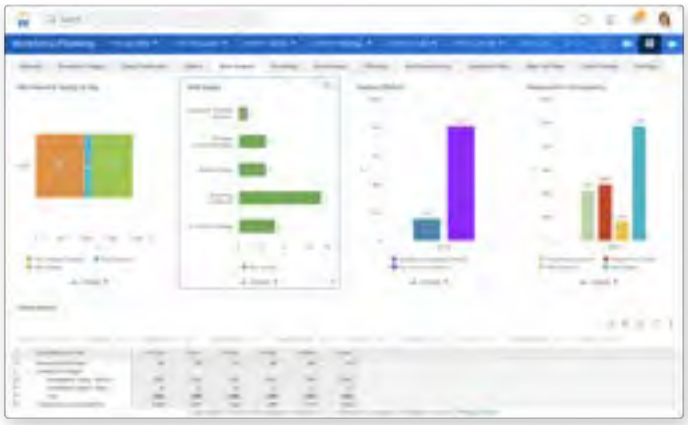
The business agility you need.

Today's evolving business environment requires agility—and Workday Adaptive Planning enables HR business partners and leaders to become more agile during their planning cycles. Quickly course-correct, and use dashboards and dynamic reporting to monitor and analyze costs, view open positions, and break down the geographical mix of your workforce:

- Track plans against actuals so you don't over-hire or end up short-staffed.
- Analyze gaps in achieving your plan; add planned hires, push out hiring dates, change ramp-up time assumptions, plan for attrition, and see capacity impacts in real time.
- Quickly model and analyze the impact of important events, such as M&A, divestitures, or internal restructuring.
- Model skills by location, ramp-up time, cost of workforce, and more to meet current and long-term business goals.

Key Capabilities

- Plan your workforce with flexible, multidimensional models that map to how you run your business—by level, department, job family, skills, projects, location, FTE vs. contingent workers, and more.
- Model hiring, transfers, and retention plans, and instantly see the cost impact to data updates or driver changes—by supervisory organization or cost center.
- Compare multiple driver-based, what-if scenarios in real time to see the impact upstream and downstream to create the optimal plan.
- Perform what-if labor analysis that includes areas such as salary and salary increases, bonuses, and equity compensation pool scenarios across business units.
- Drill down from plan data directly to your Workday human capital management and financial transaction data, and metadata.
- Plan and model the impact of one-time events, such as restructures or M&A.
- Model critical skills capacity, demand, and gaps by location, cost, and ramp-up time.



Match skills supply with demand.

Tightly link planning to execution and analysis.

Bringing your planning, execution, and analysis needs into a single platform drives our vision for planning. To be effective, your workforce plans need trusted ERP and human capital management data for visibility into key people metrics and movements to act as drivers for financial plans and reports. From one platform, analyze critical skills needs, identify gaps and how best to fill them, and then put your plans into motion by leveraging business process frameworks in Workday. Build in succession plans, ramp-up time for new hires, and cost of learning programs for current employees to inform your grow, flex, and hire people decisions.

Workday Adaptive Planning also offers a user-friendly integration platform that reduces the need for IT support. In addition to being tightly linked to your financial and HR data in Workday, you can automatically tap into data from third-party sources, such as salary and benefits benchmarking data, to more accurately drive your workforce planning decisions.

Safeguard your data with enterprise-class protection.

We know how critical it is to protect your data, particularly workforce data. Workday Adaptive Planning provides enterprise-class protection, service, and resilience you can rely on and trust, with SOC 2 Type 2 compliance—the AICPA standard for reporting on controls at service organizations, including SaaS providers. The SOC 2 attestation covers security, confidentiality, processing integrity, and availability trust principles.

To explore how Workday can enhance your workforce planning needs, visit: workday.com/workforce-planning

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HiredScore AI for Talent Mobility.

Deliver on your employee growth and development agenda.

Empower employees to be aware of the right job and growth opportunity at the right time while enabling managers and HR leaders to drive internal mobility and retention goals.

We often hear it's easier for employees to find jobs externally than internally—proven by the fact that only 33%[1] of employees who are searching for a new job look internally first. Many employees don't have time to continually watch for new open roles, resulting in dissatisfying internal candidate experiences and processes. It's equally challenging for managers to keep up with possible career pathways for their team, making it difficult to support employee growth and development.

Take the friction out of internal mobility and make it easier for employees to find new opportunities internally whenever possible. HiredScore AI for Talent Mobility with Workday delivers high-converting job recommendations in the flow of work; incorporating your company's mobility policies and holistic data such as employee interests, skills, time-in-role, and performance. Empowering employees to explore, apply to, and advance in roles within the organization helps improve retention while leveraging existing skills and knowledge, fostering a more engaged and loyal workforce.

Jobs that come to employees.

Employees receive highly relevant internal job opportunities directly within their existing workflow of MS Teams or email—eliminating the need to navigate internal application systems. Workers can choose to apply directly without leaving MS Teams, dismiss the recommendations, or further explore opportunities in the Workday career hub. Smart alerts notify employees of the additional opportunities they could receive once they complete their profile, including suggestions based on location preferences, prior experience, and capabilities. This interactivity highlights the "what's in it for me" aspect for the employee, driving continuous optimization and personalization of recommendations and enriching your employee dataset within Workday to drive a better employee experience.

Guided mentorship and career coaching.

Managers and HR business partners gain access to tailored job opportunities and status updates to mentor employees and provide one-to-one career coaching. Managers can proactively look for open opportunities for their team members directly within their MS Teams workflow to help facilitate important conversations about career progression. *Please note this is an additional implementation cost.*

Key Benefits

- **Personalized matching:** AI-powered, highly curated matching of employees to open roles
- **Intuitive user experience:** Proactively meets employees in the flow of work via MS Teams or email
- **Employee satisfaction:** Workers can navigate and apply to internal opportunities without adopting new tools
- **Data-driven insights:** Reporting enables talent and people analytics leaders to track employee progress and inform next steps

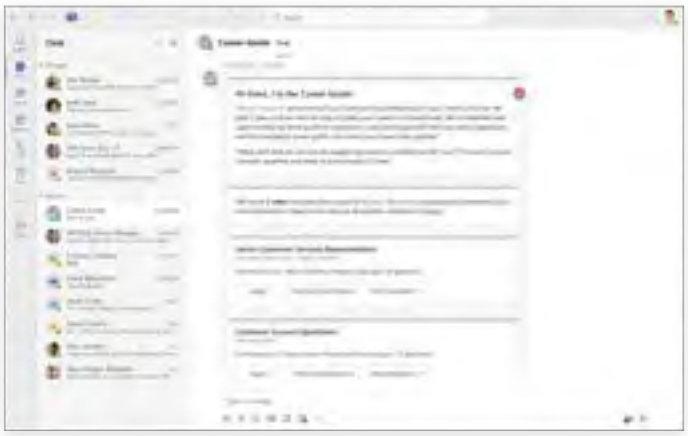
Key Features

- Employee career guide via MS Teams or email
- Employee data optimization linked to the Workday talent profile
- Tailored employee matching and communications
- Real-time notifications and alerts
- Internal mobility dashboard
- Manager moderated talent mobility*

*Additional implementation cost

Results

- 30% increase in internal application rates when contacted via AI-driven notifications
- 1.4x better-quality candidates compared to external applicant pool
- 18.75% increase in internal employees hired or in process of getting hired for a new role
- 2.3x increase in likelihood to move when provided tailored recommendations
- 5% improvement in employee retention when employees were encouraged to apply for internal jobs



Employee career guide.

Talent mobility insights and analytics.

Talent leaders and people analytics professionals can track employee progress to inform relevant and timely next steps. The internal mobility dashboard provides clear visibility into employee interest and progression overall by groups and by employee, enabling further advancement of internal mobility goals. Key insights, including internal mobility engagement analytics as well as detailed reports, enable leaders to track progress and identify areas of opportunity to further drive mobility.



Internal mobility dashboard.

Trusted, responsible AI.

Success with AI requires working with partners and solutions that prioritize trustworthy AI development, including a focus on explainability and transparency. Our fully transparent AI provides bias auditing, enabling talent leaders and managers to hire fairly and efficiently.

> “Partnering with HiredScore [a Workday company] to innovate around career mobility allows us to bring a more fair and universal talent discovery process for our amazing employees and have a more sustainable workforce that continually contributes to the communities our buildings occupy

Global Head of Talent Acquisition, **Fortune 500 Real Estate Services Company**

To learn more about how HiredScore AI for Talent Mobility can help your organization, please visit: https://www.workday.com/en-gb/products/talent-management/ai-recruiting.html

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PARADOX | workday

Innovation Partner workday

Ventures Partner workday

Paradox for Workday

The conversational recruiting platform chosen by 200+ Workday clients (and counting).

1 Save time and reduce manual tasks for recruiters and hiring managers.

The Paradox platform actually gets work done for your team, assisting recruiters in screening and scheduling automation or handling all manual hiring tasks for frontline managers.

15.6 Million interviews automatically scheduled

2 Create world-class, highly personalized candidate experiences.

Conversational AI creates dynamic, two-way candidate interactions via chat or SMS, answering questions, pre-screening, sending reminders, and simplifying applications.

85 Million candidates assisted

3 Increase speed and conversion at every hiring touchpoint.

Paradox conversational job search and chat-and-text to apply turns the Workday application into a conversation via chat or SMS, making it faster and easier for candidates to apply in minutes.

1 Billion messages automated



gm · Johnson Controls · Essentia Health · Burlington · ACE Hardware · DELL · Medtronic · TRUGREEN · EuroSport Storage

Our key capabilities for Workday.

Candidate Experience & Texting

- Automated candidate screening and dynamic Q&A in 100+ languages on the fly
- 1:1 and 1:many SMS/WhatsApp and text messaging
- Text and chat to apply integrated with Workday Recruiting

Conversational Scheduling

- Full automation of interview scheduling, including:
  1:1 pre-screens, Round robins, Panels, Sequential, Multi-location, Virtual and recorded interviews
- Automated reminders and rescheduling
- Interview prep and feedback



How our integration makes life easier.

Reduce clicks with step and status workflows.

Paradox makes recruiters' and hiring managers' lives easier by triggering automation in our system based on candidate status changes in Workday. Our AI assistant then does actual hiring tasks, like reaching out to get more information from a candidate, scheduling an interview, sending reminders for pre-boarding, and more.

Simplify your user experience with Paradox Browser Extension.

Using our browser extension, recruiters can message candidates and schedule more complex interviews without leaving Workday, eliminating multi-screen distraction.

"I had a recruiter call and say, 'Hey I just wanted to share with you the impact Paradox has made on my life.' This recruiter had a very high req load; it took her hours or days to schedule phone screens.

She said, 'It was amazing. I moved 30 people to the phone screen status in Workday at 5:30 at night, and I walked away to feed my kids dinner. When I came back 45 minutes later, I had 30 confirmed phone screens on my calendar for the rest of the week. I'm sold.'"



Eileen Kovalsky
Former Global Head of Candidate Experience, GM

PARADOX | workday

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Workday Talent Optimization

The world of talent is changing and the worker experience is critical. Organizations need the tools to invest in people at every stage of their career journey. This requires a shift from capturing talent data in a siloed system to putting it at the center of many of the business decisions you make today. Workday Talent Optimization incorporates people, business, and talent data into a single system, allowing you to attract, retain, and develop a workforce for whatever comes next.

Workday Talent Optimization helps you make data-driven talent decisions, understand and nurture top talent, and engage your workers.

- **Tap into skills and talent data:** Use worker data—such as performance, skills, and career interests—to realize the full potential of your organization and your people.
- **Empower managers:** Give your managers the tools they need to facilitate a meaningful experience between the employee and employer.
- **Engage your people:** Provide career development tools that allow for career exploration, growth, and contribution.

Make data-driven talent decisions.

Dashboards and analytics.

Organizations need to leverage talent insights and analytics to measure success and improve performance. Workday provides key metrics on areas such as adoption, engagement, and skills, making it easy for you to view talent holistically and compare workers through configurable talent cards, N-box, matrix, and search reports. Dashboards can identify whether a worker is appropriately compensated for their performance or not, reducing turnover and increasing engagement.

Skills everywhere.

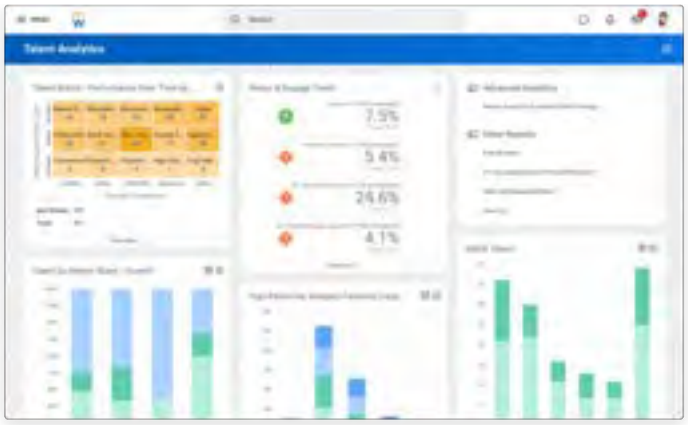
Workday Skills Cloud allows skills to be integrated and at the center of an organization's people strategy. Workday combines your core HR information with skills and experience data, delivering a comprehensive picture of the rich talent that already exists within your organization and any opportunities to upskill for the long-term success of the business.

Key Benefits

- Trusted source of skills and talent data to help organizations reach talent goals
- Ability to foster a strong relationship between manager and worker, increasing engagement and reducing turnover
- Personalized and centralized locations for workers to visualize their career path

Key Features

- Skills management
- Career development planning
- Goal management
- Performance enablement
- Talent visibility
- Talent pipeline
- Internal mobility

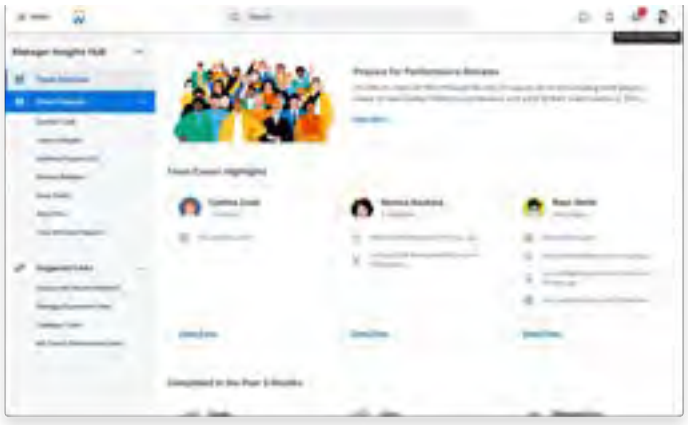


Talent insights.

Empower managers.

Understand talent.

Workday makes it easy for busy and caring managers to provide guidance and support their employees' career aspirations and well-being. Manager Insights Hub helps managers view their team's status in terms of goals, reviews, check-ins, feedback, development items, and more. They can also get a deeper view of each worker and, based on the employee's interests, suggest opportunities to nurture growth in those areas.



Manager Insights Hub.

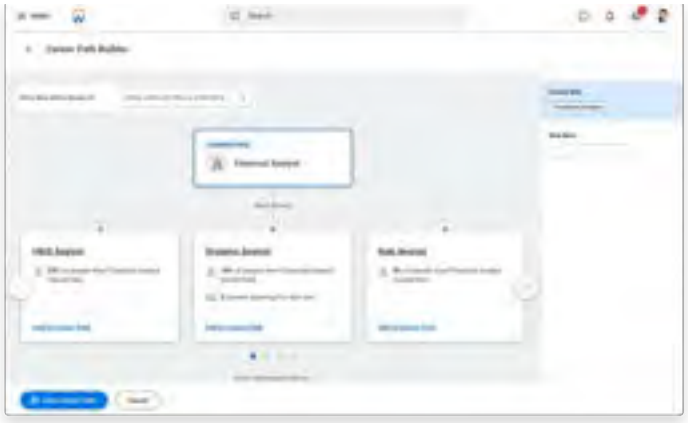
Consistent communication.

Workday supports internal collaboration between a manager and employee by way of anytime feedback and check-ins. While performance and talent reviews can be scheduled at any cadence, feedback and check-ins promote natural, informal conversations that can be used to discuss talent and career goals, no matter how small or large.

Engage your workers.

Support career development.

Workday supports your workers at every stage in their journey. Career Hub is a one-stop shop for workers to nurture their careers. They can solicit anytime feedback, converse with mentors and connections, update their skills profile using recommended skills, see new career opportunities and more. Employees can take an active role in mapping out their career journey with Career Pathing, enabling them to build and save career paths, and see the information they need to advance to the next step in their careers.



Career Pathing.

Explore opportunities.

Workers will be able to visualize where they are today and take accountability for their career plan. Workday Talent Marketplace creates transparency and connects employees to opportunities based on the skills they have or want to learn, allowing them to take an active role in their career development. Workday Talent Marketplace empowers employees by seamlessly connecting them to opportunities by removing the barriers to mobility. It creates direct lines to career growth and leverages machine learning to assess fit.

Reach talent goals.

With Workday Talent Optimization, your organization can leverage an innovative solution powered by a skills foundation to manage performance enablement, career development, and talent pipeline. Gain the tools to better understand and engage your talent, and drive personalized career development and talent mobility while adapting to the challenges of a changing world of work.

To explore how Workday Talent Optimization can help you, please visit: workday.com/en-us/products/talent-management/performance-optimization.html

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Datasheet

Workday Journeys

Every HR organization is unique and wants to create a memorable employee experience for its people; however, many current tools and systems provide static and linear experiences, leaving employees underwhelmed and feeling disconnected. Workday Journeys enables organizations to build tailored, concierge-style experiences for employees to help guide them through the moments that matter most. In addition, modular cards built with low-code tooling can assist employees through day-to-day activities by surfacing actions right at the time of need.

Engage employees in a meaningful way.

The extra mile of personalization goes a long way. If we take a look at a consumer application handbook, the most liked and trusted applications are those that provide a personal and meaningful experience. Workday Journeys takes a similar approach to experiences, both in the moments that matter and the ones in between. Whether preparing for a major career change or requesting time off, the experience must be intuitive and personal, suggestion driven, and accurate—so every person feels supported.

Exceptional experiences for productivity and engagement.

For many employees, being productive can be a challenge despite the abundance of productivity and knowledge tools available. Finding the right tool for the right task can become overwhelming, resulting in employees rarely using these tools at all. With the intuitive interface in Workday Journeys, organizations can create exceptional employee experiences. Whether it's a concierge-style journey with recommendations and steps to succeed in their role or quick access to payslips or rewards outside of Workday surfaced through a card, employees benefit from a single personalized experience for improved productivity and engagement.

Design tooling without the coding.

Experience design sounds complicated, but with Workday Journeys, it isn't. Copy, configure, and launch journeys and cards using clicks, not coding. We built our tooling to be intuitive and flexible so you can create journeys and cards that serve the needs of every employee, taking into account their location, management level, or any other employee parameter within Workday. And because this tooling pulls in real-time Workday data, the steps in a journey path are relevant and accurate for each employee.

Key Benefits

- Create concierge-style journey experiences that surface actions to users in the moments that matter
- Leverage core HCM data in order to more efficiently create experiences (cards and journey paths) for your people
- Create custom cards that allow you to pull in information and tasks from across your enterprise applications

Key Features

- Journey templates
- Journey drag-and-drop builder
- Journey path metrics and reporting
- Modular card creation
- Journey admin console
- Journey admin preview

Results

- Reduce the time and energy it takes to create personalized experiences for your people
- Increase speed and improve reliability of delivering content and insights to employees
- Reduce costs by centralizing experiences in Workday, eliminating unused tools



The first-time manager training journey path provides the information and education necessary for new managers to hit the ground running.

Extend the experience beyond the application.

The digital employee experience isn't built from a single tool or system—it's a combination of tools and systems, each with separate interfaces, security, and capabilities that can overwhelm employees in their search for guidance. With Workday Journeys, employees benefit from a single workspace that joins data, insights, and actions from multiple systems into one. Leveraging REST API data and the intuitive Workday interface, outside tasks and information are brought into Workday, giving employees one location for what they need, plus a mobile and collaborative experience.



Workday delivers several journey templates that provide prebuilt content recommendations based on our most popular use cases, such as open enrollment, onboarding, diversity and inclusion, and more.

Workday Applications

Human Capital Management

- Human Capital Management
- Workforce Planning
- Benefits
- Compensation
- Talent Management
- Recruiting
- Payroll Solutions
- Time and Absence Management
- Learning
- Help

To explore how Workday Journeys can help your organization engage employees in a meaningful way, please visit: workday.com/en-us/products/human-capital-management/employee-experience.html

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Workday Time Tracking

Workday Time Tracking is a consumer-driven, global time-and-attendance application that works seamlessly with Workday Human Capital Management (HCM), Workday Payroll, Workday Absence Management, Workday Scheduling, and Workday Projects. This cloud application provides global organizations with an end-to-end user experience that is accessible anywhere, increasing adoption for users whether they're using the web, a mobile device, or a physical time clock.

Workday Time Tracking helps organizations increase worker productivity, reduce labor costs, and minimize compliance risks.

Boost productivity with an engaging and user-friendly experience.

Workday Time Tracking is a consumer-driven time-and-attendance application that is available anytime, anywhere, both online and on mobile devices. It delivers an engaging experience that drives user adoption across the workforce, giving organizations the ability to streamline time-entry and approval processes. Workers and managers can quickly and efficiently enter and approve time, allowing them to focus on their work and add more value to the organization.

- **Self-service time entry.** Enter time worked from web browsers or mobile devices. Time can also be entered against projects using an easy-to-access calendar view.
- **Mobile and web time clocks.** Check-in and checkout time clocks for workers include automatic date and time stamps, as well as geofencing for mobile devices. Workers can easily access their activity history.
- **Efficient approvals.** With time editing and approvals, managers can efficiently add, correct, submit, and approve time for a large group of workers. In addition, validation alerts can be resolved all on one page for an enhanced manager experience.

Key Benefits

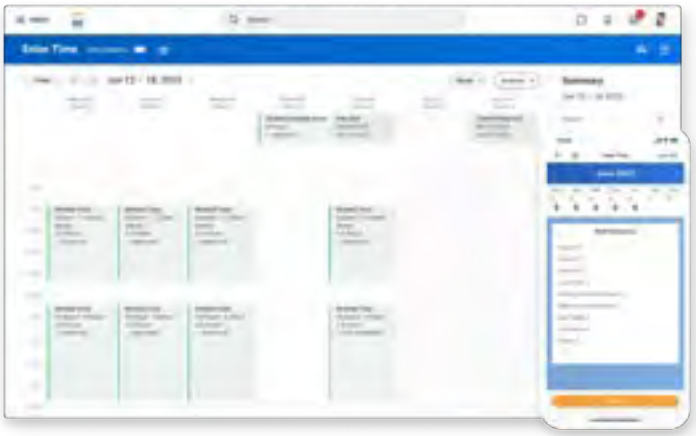
- Engage users with a consumer-driven, enterprise-grade application
- Simplify global workforce management
- Reduce labor costs
- Minimize compliance risks
- Increase workforce productivity
- Lower total cost of ownership

Key Features

- Global time entry
- Mobile and web time clock
- Time-clock integration
- Time approvals
- Real-time calculation
- Configurable business processes
- Reporting and analytics
- A single system for time and absence management
- Attendance and points tracking

Results

- 50,000 manager hours saved each year with automated time management *(Life Time Fitness)*
- 30%+ improvement in timesheet completion rates *(Unum)*
- 67% fewer late time corrections per pay period *(Clark County Washington)*



Enter time via mobile or desktop.

Control labor costs.

This end-to-end system seamlessly processes HR functions, along with time, attendance, and scheduling, reducing all manual effort and accurately reflecting in payroll every time.

- **Actionable reporting.** Get real-time reporting to analyze global workforce costs and trends. Use actionable insights with embedded analytics at the point of decision-making to more appropriately align with workforce plans.
- **All-in-one dashboard.** Frontline managers and admins can oversee critical labor and productivity tasks through a single dashboard. It's easier than ever to monitor their team's daily trends and quickly handle time and absence issues.

Lower compliance risks.

Organizations can minimize compliance risks by automating workforce management processes and eliminating manual interpretation of pay rules around rates, hours worked, and overtime.

- **Easy configuration.** Time-entry templates are configurable and standardized.
- **More control.** Managers can override rate during time entry and correct time off. For multiple jobs, approvals can be routed separately to each manager, eliminating approval delays.
- **Time-clock integration.** Workday delivers APIs that enable organizations to integrate their physical time clocks with Workday Time Tracking (supports inbound integration to import clock-in/outs).

> "Mass timecard submissions and approvals save time and allow our managers to focus on their most important and valuable work.
>
> **Thermo Fisher**

WORKDAY TIME TRACKING	
Global Time Entry	• Web time entry • Time entry from calendar view • Configurable time entry (in/out, units, required/optional worktags) • Time entry against projects • Administrator-defined scheduling
Mobile/Web Time Clock	• Check-in and checkout • Geofencing capabilities • Employee activity history
Time-Clock Integration	• APIs to integrate with physical time clocks and other time clock systems
Time Approvals	• Flexible manager/supervisor approvals • Mass online edit and approvals • Exception management
Global Time Calculation	• Enterprise-grade calculation engine • Real-time calculations before payroll run (overtime, double time, and so on) • Configurable time-calculation framework • Support for weekly/daily/consecutive days overtime, holidays, shift differential, predictive scheduling, minimum rest period, and more
Combined with Workday Applications	• Workday Human Capital Management, Workday Payroll, Workday Absence Management, Workday Scheduling, and Workday Projects • Integrated with Workday Cloud Connect for Third-Party Payroll

To learn more about Workday Time Tracking, visit: workday.com/en-us/products/workforce-management/time.html

workday.

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Datasheet

Workday Scheduling.

Labor costs often make up the greatest portion of your organization's spending. In today's environment, building a workforce that can quickly respond to change requires a laser focus on controlling costs while also balancing worker needs and operational goals.

That's where Workday comes in. Workday Scheduling enables you to balance both business and worker needs when generating shift schedules and provides a continuous real-time view of labor spending, productivity KPIs, and workforce analytics—all seamlessly connected in a single workforce management system.



Workday Scheduling via mobile and desktop.

The solution seamlessly integrates with Workday Human Capital Management (HCM), Workday Time Tracking, Workday Absence Management, Workday Labor Optimization, and the rest of the Workday suite so it all works effortlessly together without costly integrations and with complete transparency into labor costs with a single source of data.

A schedule strategy that balances people and business.

Easily balance worker preferences with business needs, and do it at scale across locations. Simultaneously give your workers more control over their work lives while meeting the demands of your business.

Key Benefits

- Time saved generating schedules so managers can focus on workers
- Ability to maintain tight control of labor costs
- Empowering workers with input into their preferred schedules
- Engaging workers with a self-service mobile app
- Full transparency into labor costs with a single source of data
- Unification with Workday Time Tracking, Human Capital Management, Absence Management, Labor Optimization, VNDLY, and the rest of the Workday suite

Workday Scheduling is an intelligent scheduling solution that automatically generates schedules based on fixed shift patterns and assigns workers to shifts based on worker availability, preferences, and qualifications.

Automate to make scheduling less work.

Automatically generate schedules based on business rules. Assign workers to shifts based on worker availability, preferences, and qualifications. Configurable validations automatically highlight schedule errors and warnings.

Experiences that engage workers and managers.

Workers are able to manage availability and schedule preferences, receive notifications about their schedules, view schedules, offer and request to cover shifts on the open shift board, and swap shifts via their mobile device. Managers view and manage labor needs from a centralized hub via their mobile device that automates scheduling and time tracking and highlights where they should focus next.



Open shift board and team view.

Scheduling analytics and notifications to guide your decisions.

Workday Scheduling provides managers and schedulers with real-time insights into configurable time and scheduling KPIs so they can quickly react based on dynamic business needs as schedules are being worked.

Flexibility to react to change.

When managers and schedulers need to update shift assignments, Workday Scheduling automatically suggests qualified and available replacement workers using AI and an objective Replace Worker score, which helps reduce implicit bias. You always have the ability to manage, adjust, and edit schedules as needed.

Key Features

- Automatic schedule generation
- Centralized time and scheduling manager hub
- Real-time analytics to compare scheduled versus actual hours and labor costs
- Interactive schedule for managers
- Drag-and-drop scheduling
- AI-recommended workers
- Mobile app for workers and managers
- Worker preferences
- Open shift board
- Shift swapping
- Predictive scheduling / fair work week support

Results

- Two-thirds of the time saved on weekly scheduling activities by the managers—On Running
- Saves store managers 30 to 40 minutes per week on scheduling activities—Mister Spex
- $1M in annual labor savings —Life Time Fitness

Supercharge workforce optimization.

For organizations with a large, dynamic hourly workforce and fluctuating labor demands, Workday Scheduling integrates seamlessly with Workday Labor Optimization, which harnesses AI to generate optimized shift schedules based on fluctuating demand and automatically assign workers with the right availability, preferences, and skills.

Learn more. To explore how Workday Scheduling and Workday Labor Optimization can help you, visit: **workday.com/ scheduling**

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Datasheet

Workday Labor Optimization.

For businesses with fluctuating labor demand—such as retail, hospitality, and food services—labor costs can quickly skyrocket, negatively impacting profitability and revenue goals. At the same time, organizations are competing for quality workers, who are increasingly requesting more control over their work lives, as well as more stability and growth opportunities.

With Workday Labor Optimization, managers and schedulers can efficiently schedule their workforce with precision while also balancing worker preferences with business parameters, compliance, and labor needs.



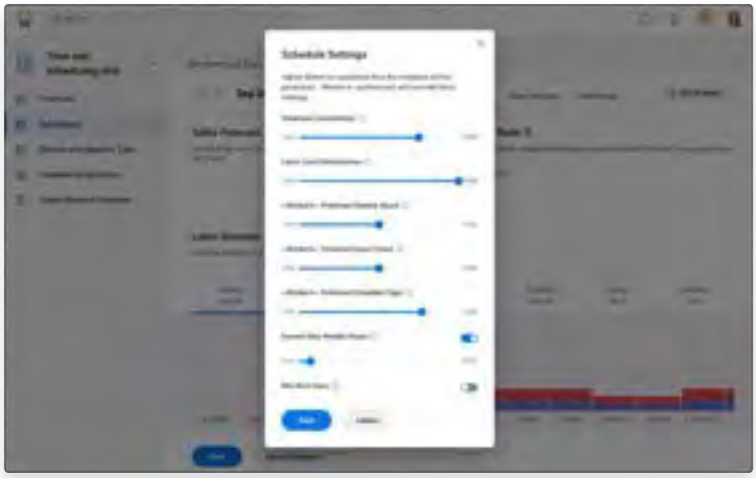
Sales forecast and labor budget.

Workday Labor Optimization was built from the ground up with an AI-based optimization engine at its core. The solution works with Workday Scheduling to generate optimized shift schedules and worker assignments based on fluctuating labor needs. Combined with Workday Scheduling, the solution balances changing business goals with worker availability, preferences, and skills to generate optimized shift schedules for industries with large, dynamic hourly workforces.

The labor optimization engine harnesses AI to create optimal schedules that accommodate an extensive number of worker preferences and business constraints from throughout Workday Human Capital Management (HCM) and Workday Financial Management or external systems. The intelligent decision-making capabilities analyze operational data to suggest needed labor and automatically match workers with the right skills, preferences, and availability into shifts.

Key Benefits

- Handle tens of thousands of scheduling scenarios, generating optimized schedules and assigning workers in seconds
- Maintain tight control of labor costs, and eliminate needless overtime and waste
- Maximize operational efficiency with automation and labor optimization KPIs
- Easily flex schedules as demand fluctuates
- Achieve sales, revenue, and other business targets with precise shift coverage
- Drive productivity by matching the right workers with shifts
- Measure schedule quality informing scenario planning to support business objectives
- Benefit from unification with Workday Scheduling, Workday Time Tracking, Workday Absence Management, Workday HCM, and the rest of the Workday suite for frictionless, accurate workforce management



Adjust schedule settings.

Optimize schedules and labor instantly.

Are your labor demands fluctuating? Let machine learning (ML) take care of it. The ML-based forecasting engine is trained on historical data to identify patterns and trends, and uses this information to predict future outcomes. It also uses advanced algorithms to adjust for various factors, such as weather data, holidays, nearby events, or store promotions. All these factors help ensure accurate and reliable forecasted metrics.

Workday generates a labor demand based on future metric predictions, showing managers how many people are needed during each hour increment for the day for each role.



ML-based demand forecasting.

Key Features

- AI-powered labor optimization engine
- Simultaneous generation of shift schedules and worker assignments
- Worker assignment by availability, preferences, and skills
- Built-in schedule optimization score and productivity measurement
- Recommendation of replacement workers
- Ability to schedule shifts in 60-, 30-, or 15-minute increments
- Visibility into coverage gaps
- Ability to leverage ML-based forecasting engine to generate future scheduling driver predictions
- Volume-based rules to determine labor demand
- Fixed labor activities to capture operation tasks

Results

- Saving store managers 30 to 40 minutes per week on scheduling activities.
  Mister Spex
- Two-thirds of the time saved on weekly scheduling activities by managers.
  On Running
- Consolidated 22 systems to 1 with Workday.
  Lore Group

The AI-powered labor optimization engine at work.

Shift shaping.

The engine automatically determines the best variety of shift lengths and begin/end times to cover labor demand while taking worker availability, minimum weekly hours, and other constraints and objectives into account.

Shift assignment.

The engine simultaneously assigns workers to shifts while adhering to business and worker preference constraints and optimizing to meet objectives.

Schedule score.

After generating a schedule, the engine responds with a schedule score that represents the overall quality of the schedule across a variety of dimensions, including the objectives set at the time of schedule generation.

Recommended worker replacement.

For those workers who are not able to make their shift, the engine automatically recommends replacement workers for an existing shift.



Schedule score.

To explore how Workday Scheduling and Workday Labor Optimization can help you, please visit: workday.com/scheduling

With Workday Labor Optimization, embedded AI gives you the power to match your labor demands with worker preferences, generating optimal shift schedules for workers as well as the business.

Labor optimization is a critical aspect of workforce management for organizations with a large hourly workforce and that need flexibility to schedule and manage workers across locations, shifts, and roles.

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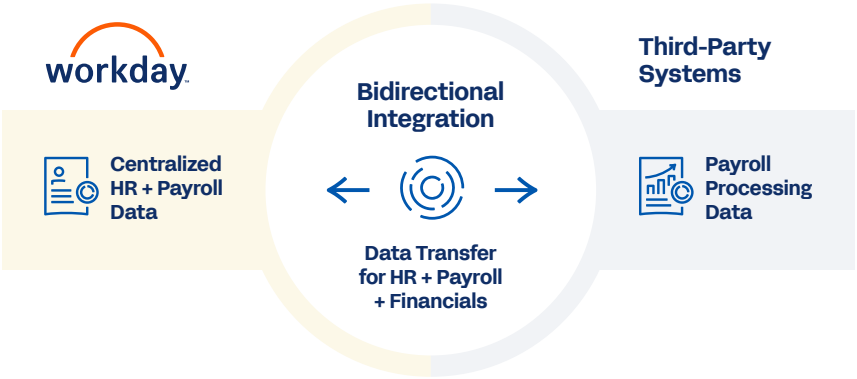
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Datasheet

Manage global payroll, HR and workforce data in one place.

Workday Global Payroll Connect offers seamless integration with payroll providers in the Workday partner ecosystem, enabling an end-to-end global payroll experience while managing payroll, HR, and workforce data right within Workday.

From meeting evolving country-specific tax regulations and compliance needs to getting real-time data across regions of operations, organizations need more support from their payroll vendors to make informed, data-driven decisions. Managing data and integrations on a global scale is complex, time-consuming, and often results in a disjointed experience for workers and disconnected data for payroll practitioners. With seamless integrations between Workday and trusted global payroll partners, Workday provides a consistent view across all your pay data and bi-directional data transfer for streamlined, automated payroll processing regardless of where workers are paid.



Streamline and automate payroll processing with bi-directional data transfer.

Payroll integrations can be costly and time-consuming. Global Payroll Connect reduces the complexity associated with payroll integrations through pre-built, bi-directional integrations. With GPC, you can quickly reflect changes in HR and pay data across systems with bi-directional REST APIs that enable:

- Third-party systems to easily flow and query data from Workday
- Notify third-party systems of hires and terminations almost instantly
- Send notifications to specific workers based on their role through simple text notifications
- Upload payroll documents and results from third-party vendors into Workday for a holistic view for employees and managers

Key Benefits

- Deliver a seamless end-to-end experience for payroll practitioners and employees
- Boost satisfaction and engagement with a simpler, consistent employee experience
- Make faster, data-driven business decisions
- Reduce lengthy deployment times and costly integrations
- Deploy integrations effortlessly in over 100 countries through trusted global payroll partners

Key Features

- Bi-directional REST APIs enable third-party systems to easily flow and query data from Workday
- Direct access to third-party payroll data in one place
- Reduced log-ins and improved employee self-service capabilities
- Enhanced audit trails via checklists

Results

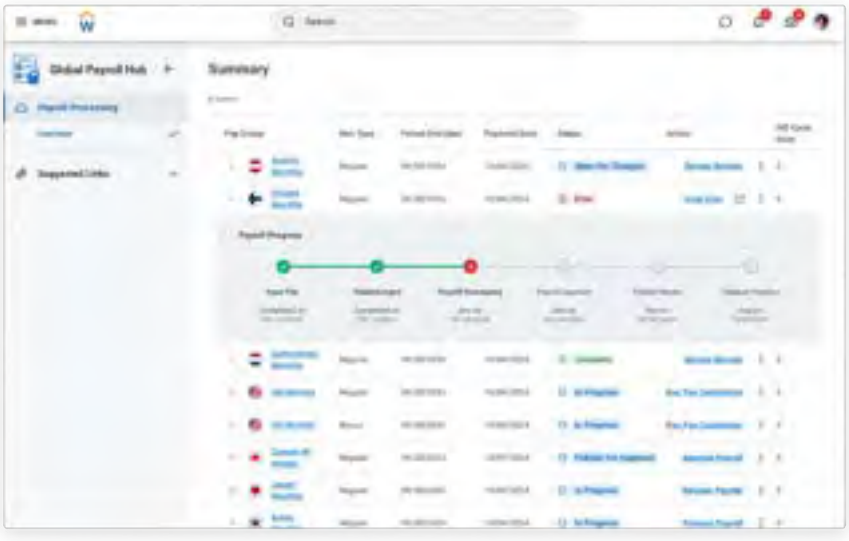
- Streamlined Payroll Operations with automated data transfer for all countries regardless of population
- Faster and cheaper deployment

Simplify global payroll management.

Global Payroll Connect aims to simplify the experience for both employees and payroll practitioners to boost employee engagement and payroll practitioner productivity. With a simpler, more consistent experience, employees can get direct access to their HR and pay data within one system, regardless of where they're paid. Employees can update HR details and upload payroll-related documents in Workday and the partner payroll is updated simultaneously, enabling employees to view HR and pay information in Workday even if they're paid through a partner.

With **Global Payroll Hub**, payroll professionals gain a holistic view of payroll processing status, tax information, and metrics across different pay groups, countries, and across Workday payrolls and partner payrolls–in near-real time. Global Payroll Hub empowers users to:

- **Be proactive:** Monitor and identify items requiring immediate attention
- **Customize workflow:** Create custom checklists for each pay period to ensure accuracy with access to a comprehensive audit trail of actions performed by authorized users, directly from the checklist
- **Stay on track:** Receive notifications for key dates and required actions
- **Dive deeper:** With drill-down capabilities, you can view details in a pay group's processing including variance analysis to spot any discrepancies and take action quickly
- **Take action:** Perform vendor-supported actions right from the Hub



Global Payroll Hub view of payroll processing status across pay groups and countries.

More choice and flexibility with our global payroll partners.

The Workday global payroll partner program provides prebuilt, pretested country-specific integrations between Workday and third-party payroll systems, using a standardized approach for deployment, integration, and support. With over 100 country-specific certifications, customers gain flexibility and efficiency in managing payroll integrations while minimizing costs and effort.

These certified integrations ensure seamless data transfer of employee and organizational information, keeping Workday as the system of record. Fully documented and tested, they reduce setup and maintenance expenses, streamline processes, and eliminate the complexities of ongoing updates, offering a reliable and cost-effective solution for global payroll management.

Workday global payroll partners.

Workday global payroll partners include activpayroll, ADP, Alight, Ascender, CDP Group, CGI, CloudPay, Datacom, Excelity Global, Grupo Tress Internacional, i-Admin, iiPay, Immedis, Intelligo, Neeyamo, Papaya Global, Payroll Inc., PaySpace, PwC, Ramco Systems, Safeguard Global, SD Worx, Sopra HR Software, Strada, SwissSalary, TMF Group, Toshiba, and Zucchetti S.p.A.

Global payroll made easy.

Providing a seamless, configurable, bi-directional integration experience between your core HR system of record and your external payroll provider is important. With built-in Workday HCM features, configurable connectors, and web services, Workday Global Payroll Connect enables organizations to streamline payroll, reduce payroll operating costs, and deliver a seamless and consistent experience to all workers globally.

To explore how Workday can help you, visit: **Workday Global Payroll**

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20241213-workday-global-payroll-connect-datasheet-enus

Datasheet

Workday Payroll for the UK and Ireland.

Elevate payroll. Empower your people. Drive strategic impact.

In today's dynamic business landscape, organisations face increased complexity and risk. Economic uncertainty, evolving regulations, and new ways of working are all impacting payroll, putting immense pressure on payroll teams to adapt to change while staying compliant and avoiding penalties.

Payroll is more than just a back-office function; it's a critical driver of employee engagement, productivity, and overall business success. Yet, many organisations rely on outdated, fragmented payroll processes that hinder agility and strategic decision-making.

Workday Payroll for the UK and Ireland is a unified, cloud-based solution that helps organisations transform payroll into a strategic asset. Embedded in the AI platform for HR and finance, the solution empowers you to streamline processes, improve accuracy, ensure compliance, and unlock valuable insights.



Self-service that empowers employees.

Optimise end-to-end payroll processes.

Streamline your entire payroll process with a single unified platform that connects your people, data, and processes. Minimise integration needs and reduce data breach risks with one extensible, open platform that unifies payroll with HR and finance. For UKI multinational organisations, Workday payroll seamlessly connects to a trusted network of global and local payroll partners so you can gain a comprehensive view of your payroll operations across all countries and pay groups.

Key Benefits

- Reduce costs with a unified, cloud-based system
- Define processing criteria for pay runs and run multiple pay groups together
- Streamline payroll processing with a robust, automated calculation engine that handles complex requirements
- Support compliance and improve payroll accuracy with comprehensive audits
- Offer mobile and online employee access to payslips and P60 forms
- View prebuilt reports for insights into payroll results
- Get automatic tax updates through the cloud

Key Features

- UK holiday pay
- Continuous payroll processing
- Retro payroll processing
- Real-time visibility into the general ledger
- Highly flexible, anytime audits
- Built-in reporting and analytics
- Mobile-first employee experience
- Automatic tax updates

Customer Results Achieved

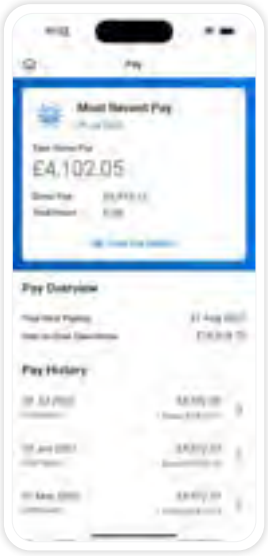
- Reduced payroll processing from 2 days to 1 hour
- Reduced monthly error rate by 80%
- 78% reduction in payroll time spent on data exceptions

Champion new ways of working.

Easily configure business processes, payroll calculations, and reporting frameworks to meet new regulations and specific reporting requirements without relying on third-party service providers or IT. Leverage AI-infused technology to improve accuracy, simplify audits, ensure compliance, and free up your payroll team for strategic initiatives. Scale fearlessly with the robust and reliable Workday platform trusted by the world's most sophisticated companies on a single version.

Empower your people.

Empower your employees and unlock the strategic potential of your payroll team through AI-driven experiences. Drive employee engagement and satisfaction by enabling them to easily view and manage both their HR and pay information in one system. Leverage AI and automation to optimise workflows and eliminate repetitive manual tasks, enhancing your payroll team's productivity.



Access mobile payslips via self-service. One system for analytics and payroll based on the most complete source of workforce data.

Become a data-driven business partner.

The unified Workday platform for HR, workforce, and payroll provides real-time analytics and reporting that allow you to align payroll data and insights with your business goals and strategic workforce plans. With real-time analytics based on live HR, workforce, and payroll data, you can make data-driven decisions and proactively address potential issues by analysing results mid-period. Gain strategic insights from your payroll data and model and predict future outcomes using real-time analytics and reporting.

Workday Global Payroll Partner Programme.

Global companies that want to use Workday Payroll for the UK and Ireland can take advantage of the Workday Global Payroll Partner Programme if they have payroll needs outside of the UK and Ireland. The Workday Global Payroll Partner Programme provides prebuilt, pretested country-specific integrations between Workday and third-party payroll systems using a standardised approach for deployment, integration, and support. With over 100 country-specific certifications, customers gain flexibility and efficiency in managing payroll integrations while minimising costs and effort.

These certified integrations ensure seamless data transfer of employee and organisational information, keeping Workday as the system of record. Fully documented and tested, they reduce setup and maintenance expenses, streamline processes, and eliminate the complexities of ongoing updates, offering a reliable and cost-effective solution for global payroll management.

Workday Payroll for the UK and Ireland

Payroll processing.

- Calculate on any earning, deduction, or accumulation for any time period
- Calculate in batch mode for pay group, at worker level with just one click, or in real time with continuous calculation
- Determine how gross-to-net is calculated for different types of payroll runs
- Define criteria for specific earnings and deductions
- Process weekly, fortnightly, four-weekly, monthly, quarterly, biannual, and annual pay frequencies (UK)
- Process retroactive changes such as compensation changes
- Process manual payments, on-demand payments and pay reversals (UK)
- Process weekly, fortnightly, monthly (IE)
- Process manual payments, on-demand payments (IE)

Earnings and deductions.

- Manage unlimited number of earnings and deductions
- Define a set of rules for earnings and deductions
- Map to compensation elements or benefits from Workday Human Capital Management
- Manage eligibility criteria and scheduling logic for accurate processing
- Use the flexible worktag feature to identify unique allocations
- Split labour allocations at the employee, position, and earning level
- Configure arrears calculations and net-pay validations
- Configure absence management for SSP, SMP, SPP, SAP, ShPP, and SNCP (UK)
- Configure absence management and earnings for holiday pay that supports average pay calculations within the qualifying period (UK)
- Manage student and postgraduate loans (UK)
- Manage court orders for England and Wales, Scotland, and Northern Ireland regions (UK)
- Manage PAYE and national insurance (UK)
- Manage pension auto-enrollment assessment, re-enrollment, and associated pension scheme contributions (UK)
- Configure absence management for occupational sick and parental leave, and statutory offsets (IE)
- Configure AEO and NOA court orders (IE)
- Manage income tax, PRSI, USC, and LPT (IE)

Accounting and compliance.

- Configure payroll chart of accounts and define account posting rules
- Analyse payroll-accounting reports with drill-down
- Use worktags for easy allocation to projects, cost centres, funds, grants, and custom organisations
- Take advantage of the Workday cloud model to get tax updates seamlessly and automatically
- Receive electronic tax code, student, and postgraduate loan notifications (UK)
- Create P60 forms that can be distributed to employees through employee self-service, mobile devices, or paper (UK)
- Receive electronic PAYE Modernisation (RPN) Revenue Payroll Notifications (IE)

Audit and reporting.

- Schedule recurring audits to run automatically
- Run common predefined reports, such as payroll register, pay balance summary, and pay calculation results
- Configure reports to display any earning, deduction, or balance values
- Create audit reports at the summary, pay group, or worker level
- View, track, and manage audit exceptions in real time via the payroll audit exception summary or the payroll audit exceptions report
- Define criteria to perform audits against pay results
- Compare payroll results across periods
- Take action on a pay-calculation result through a one-click report
- Configure specific earnings or deductions views for select security groups (for example, managers and benefits partners)
- Export any page or report directly to Microsoft Excel or a PDF with a single click or use your data in worksheets to collaborate in teams
- Run machine learning powered audit insights
- Process real-time information (RTI) directly from HM Revenue & Customs (HMRC) (UK)
- Manage RTI reporting with the ability to send test submissions to test in live service prior to completing payroll and submitting to live (UK)
- Process PAYE Modernisation real-time reporting (RTR) directly to Irish Revenue (IE)
- Manage regulatory reports

Workday Payroll for the UK and Ireland

Accumulations and balances.

- Add or modify accumulations easily
- Define balance periods, even after periods have been processed
- Report on balances and accumulations

Year-end processing.

- Create and publish form P60 (UK)
- Process and apply year-end, tax code, and clear down changes (UK)
- Create and transmit Final Payment Submission (FPS) tax adjustments (UK)

Employee self-service.

- View pay slip information online or from a mobile device
- Add or edit payment elections (direct deposit)
- Use paperless opt-in for payroll and tax documents
- Compare pay slips and pay components over time with the employee pay self-service dashboard
- Enable self-service for voluntary deductions
- View P60 documents (UK)
- Enter new starter checklist details and upload a copy of P45 when onboarding (UK)

To learn more, watch the **Workday Payroll for the UK and Ireland quick demo**.

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20250521-workday-payroll-uk-datasheet-enus

Datasheet

Workday Payroll for Canada.

Workday Payroll for Canada addresses a broad spectrum of enterprise payroll tasks. And because payroll is one of the most manually intensive processes in HR and finance, Workday is committed to making payroll more efficient and intelligent with continuous payroll calculations, smart payroll audits, and retro payroll processing. Workday Payroll offers the control, flexibility, and transparency you need in order to support your unique organization. Workday Payroll helps customers pay their workers accurately, on time, and compliantly. Our application goes beyond transacting by transforming businesses with higher worker engagement, maximized productivity, and increased agility.

Connected and future-ready.

Designed as part of a single solution alongside Workday Financial Management and Workday Human Capital Management (HCM), Workday Payroll for Canada helps you maximize your overall investment.

- **Unified solution:** Capitalize on connected, real-time data by maximizing the value of employment data as well as providing a system of engagement for your workers. Organizations can maximize the value by having a single solution that helps to not only reduce payroll errors and improve accuracy, but also to simplify and enhance the worker's experience.
- **Flexible configuration:** Configure accumulations, balance periods, and worker groups for seamless scalability and compliance in a future-proof, highly configurable framework.
- **Real-time accounting:** With access to real-time reporting and analytics, finance can preview payroll impact on the general ledger even before payroll is complete.

Effortless and engaging.

Ease the burden of challenging and complex payroll processes with a single solution for an effortless experience. Empower your workers with an engaging payroll experience that streamlines processes, manages complexity, and meets them in the natural flow of their work.

Key Benefits

- Reduce costs with a single cloud-based system
- Run payroll your way with the flexibility and control to make changes and update payroll in real time
- Streamline payroll processing with an agile, automated calculation engine that handles complex requirements
- Support compliance and improve payroll accuracy with comprehensive audits
- Increase productivity and employee satisfaction with self-service to access pay slips and year-end forms in English and French
- Meet worker financial needs with model my pay and pay on-demand features

Key Features

- Continuous payroll processing
- Automatic tax, garnishment, and legislative updates delivered in the cloud
- Real-time visibility into the general ledger
- Highly flexible, anytime audits
- Built-in reporting and analytics
- Mobile-first employee experience
- Employee self-service for TD1 and TD1X tax elections (English and French)

Results

- 81% reduction in payroll processing times
- 62% reduction in payroll cycle time
- 50% reduction in time spent on the year-end payroll cycle

- **Intelligent self-service:** Support employees with a single self-service experience where they can manage their HR and payroll data to view all HR, time, and payroll information in one place.
- **Visibility into actual costs:** Companies can now see what they're spending on workers globally. Compare payroll results across periods. Take action on a pay-calculation result via a one-click report.
- **Role-based and segment-based security:** Access pay results with configurable role-based permissions. Configurable security improves collaboration, giving business partners outside of the payroll department the ability to provide input and view results before payroll completion.



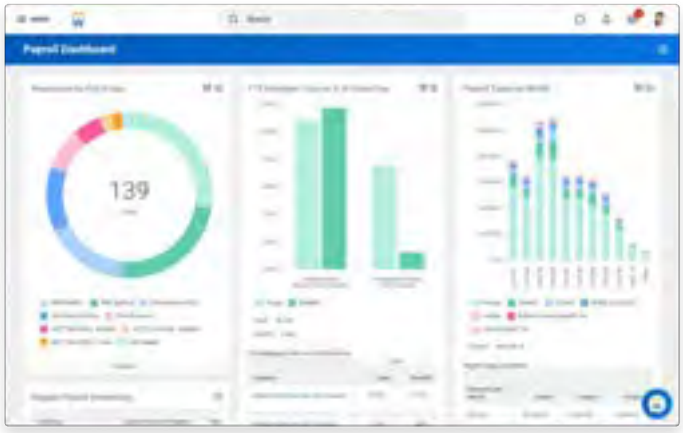
Access mobile pay slips via self-service.

Autonomous and efficient.

Do more with less, and save time and cost using Workday Payroll for Canada that is designed to analyze, anticipate, and automate. Respond to data changes on-demand with agility and efficiency through autonomous innovations such as responsible AI and machine learning (ML) that are built seamlessly into the core of an open, connected enterprise cloud platform.

- **Continuous pay calculations:** Automatically calculate pay results for each period so you can view up-to-date payroll information anytime, anywhere. The continuous calculation in Workday streamlines payroll processing by automatically recalculating payroll results in real time as pay-impacting events occur, saving valuable time.
- **Smart calculations:** You have the flexibility to schedule smart calculations and retro processing to run automatically on the events you select, so you can focus on the changes needed to support your business.

- **Control over cost:** No more cost-prohibitive charges for reports, pay components, or calculations from service bureaus. No more costly and time-consuming mandatory upgrades from ERP providers.
- **AI and ML:** AI and ML help eliminate manual interpretation of pay rules around rates, hours worked, and overtime.



Run standard, prebuilt payroll reports or customize your own.

Seamless operations globally.

Leverage the robust system in Workday Payroll for Canada for in-depth functionality, and collaborate with partners for broad coverage, ensuring seamless experiences for your global workforce.

- **Compliance:** Adhere to local legislations in Canada and be able to address any regulatory compliance changes quickly.
- **Security:** Workday is committed to protecting your data and providing a secure way for organizations to connect to third-party payroll providers around the world. Workday operates on a single and uniquely configurable security model and has implemented numerous privacy and security practices to support data processor compliance with GDPR.

Workday Global Payroll Cloud Partner Program.

Global companies that require payroll solutions beyond the native Workday Payroll offerings can take advantage of the Workday Global Payroll Cloud Partner Program, which helps reduce the costs associated with deploying, integrating, and managing third-party payroll solutions.

To make integration easier, Workday offers prebuilt integrations to partners through Workday Cloud Connect for Third-Party Payroll. Workday-certified partners build, offer, and maintain bidirectional integration, enabling payroll results to be displayed in Workday. Customers benefit by gaining a global view of payroll actuals from Workday while still being able to use local payroll providers in each country that offer their desired level of service.

WORKDAY PAYROLL FOR CANADA

Payroll Processing

- Calculate on any earning, deduction, or accumulation for any time period.
- Calculate in batch mode for pay groups, at worker level with just one click, or in real time with continuous calculation.
- Calculate workers' compensation and health taxes.
- Determine how gross-to-net is calculated for different types of payroll runs.
- Define criteria for specific earnings and deductions, including gross-up calculations.
- Manage each pay cycle, from preprocessing to postprocessing activities, with the Pay Cycle Command Center.

Earnings and Deductions

- Benefit from an unlimited number of earnings and deductions.
- Define a set of rules for earnings and deductions.
- Use intuitive mapping to compensation elements or benefits from Workday HCM.
- Set eligibility criteria and scheduling logic for accurate processing.
- Use the flexible worktag feature to identify unique allocations.
- Determine labor allocation splits at the employee, position, and earning level.
- Configure arrears calculations and net pay validations.

Accumulations and Balances

- Add or modify accumulations easily.
- Define balance periods, even after periods have been processed.
- Report on balances and accumulations.

Employee Self-Service

- View pay slip information.
- Add or edit federal and provincial withholding elections.
- Add or edit payment elections (direct deposit).
- View tax documents (T4, T4A, RL-1, RL2, T4A-RCA, and NR-4) and use paperless opt-in for payroll and tax documents.
- Compare pay slips and pay components over time with the employee pay self-service dashboard.
- Enable self-service for voluntary deductions.

Accounting and Compliance

- Configure payroll chart of accounts and define account posting rules.
- Do drill-down analysis with the payroll accounting report.
- Use worktags, which allow for easy allocation to project cost centers, funds, grants, custom organizations, and so on.
- Get tax and garnishment updates, which are delivered seamlessly and automatically with the Workday cloud model.
- Deliver tax remittance, workers' compensation, and health tax reporting for tax filing.
- Use the Workday Time Tracking statutory holiday support for federal as well as provincial workers.
- Generate Record of Employment (ROE) data to send to Service Canada.
- Integrate tax-filing and web services to the tax filing service you choose.

WORKDAY PAYROLL FOR CANADA

Audit and Reporting

- Schedule recurring audits to run automatically.
- Run common predefined reports, such as payroll register and pay calculation results.
- Configure reports to display any earning, deduction, or balance values.
- Create audit reports at the summary, pay group, or worker level.
- View, track, and manage audit exceptions in real time via the payroll audit exceptions summary or the payroll audit exceptions report.
- Define criteria to perform audits against pay results.
- Configure new or edit current audit rules based on worker eligibility and severity levels.
- Compare payroll results across periods.
- Take action on a pay calculation result via a one-click report.
- Configure specific earnings or deductions views for select security groups (such as managers or benefits partners).
- Export reports directly to Excel or a PDF with a single click or use worksheets to collaborate in teams.

Year-End Processing

- Leverage year-end dashboard to get access to strategic trends and metrics across the year-end process. Preview year-end information anytime.
- Configure, audit, preview, and generate T4, T4A, RL-1, RL-2, T4A-RCA, and NR4 year-end forms.

To learn more, please visit: workday.com/payroll

Deploy Workday and get significant value, fast.

Workday offers deployment services, training, support, and continuous innovations to help you use its products with confidence as your organization evolves. Because each customer has different requirements, resources, and goals, we've designed our services to meet a variety of needs and learning styles.

To help you reach your goals faster and empower your teams, subscription-based Workday Success Plans offer exclusive access to resources, tools, and expertise for an even deeper understanding of Workday.

For more information, visit: workday.com/cx

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Datasheet

Workday Payroll for Australia.

Payroll, a crucial HR and finance function, often faces complex and time-consuming processes that affect the employee experience. According to a recent Australian Payroll Association (APA) Industry Report, it has never been more crucial for businesses to stay ahead of compliance, governance, and strategic payroll management. In today's evolving workplace and regulatory landscape, it is critical to have accurate and timely payroll as well as strategic business insights. Adopting AI-powered automation, improving employee understanding of their pay, and streamlining data workflows is the key.

Become a data-driven business partner.

Using the most complete, trusted source of data possible, Workday Payroll for Australia offers access to built-in analytics and reporting in the same system as HR and payroll—enabling real-time insights about workforce costs, payroll, tax, and compliance to inform faster, better decisions.

Workday Payroll for Australia enables you to:

- Access pay results for any worker or period at any time by running configurable reports, such as audit, pay-balance, labor costs, and pay calculations—unlocking actionable insights that allow you to retrieve and act on payroll data immediately to make adjustments.
- View and take immediate action to make adjustments directly to the reports based on the audit alerts, decreasing time to resolution.
- Monitor pay results with interactive dashboards that allow users to drill into the underlying data for greater insight into actual labor costs.
- Improve collaboration by giving business partners outside the payroll department the ability to access pay results with configurable, role-based permissions.
- Partner with finance to view real-time, detailed journal lines before payroll completes and have them seamlessly post to the general ledger.

Key challenges for payroll leaders in Australia.

According to a recent APA payroll research report:

- **23.6%** of payroll leaders believe the biggest challenge is poor integration between HCM and payroll systems
- **22.3%** say payroll technology and process issues limit productivity
- **19.9%** believe legislative compliance remains a major concern
- **16%** of executives do not engage in payroll analytics

Workday Payroll for Australia is designed specifically for Australian businesses.

- Seamless Single Touch Payroll (STP) to the Australian Taxation Office (ATO)
- Employee self-service of TFN Declaration and Superannuation Choice forms
- Superannuation and SuperStream file for contributions to Super Funds
- PAYG withholdings
- Study and Training Support Loans (STSLs)
- Section 72A, Child Support & Court Orders
- Time off and leave payments
- Casual employees support
- Ordinary pay and proration
- Termination calculation and payments
- Settlement ABA file
- Reporting support for payroll taxes for states and territories
- Retroactive pay processing
- Off-cycle processing
- Conversational AI assistant
- Configurable Australian payslip
- HR, compensation, absence management, and payroll in a single system

Deliver on change with confidence.

Rather than hard-coded packages, Workday Payroll for Australia lets you leverage configurable frameworks built for payroll and compliance and designed to be owned by payroll, giving you the flexibility to accommodate specific business needs, complex payroll calculations, and evolving Australian regulatory requirements.

- Receive Australian compliance-related updates delivered by Workday as part of the standard service update and drill into the details to facilitate reporting.
- Report to the Australian Taxation Office (ATO) with a Single Touch Payroll Phase 2 (STP2) with a fully certified and integrated STP2 interface, without a need to leave Workday or download or upload files.
- Configure accumulations, balance periods, and balances according to your current calculation and reporting needs.
- Incorporate pay as you go (PAYG) withholding from payments made to workers including those to Higher Education Loan Program (HELP)/Study and Training Support Loan (STSL), as well as bonus, termination, lump sum, prior year, downward variations, and other tax types.
- Provide flexible Superannuation configuration, provisioning multiple default funds, different maximum super contribution base (MSCB) treatments, employee self-service (ESS) of salary sacrifice, and generation of a SuperStream file for contributions to SuperFunds.
- Utilise delivered deduction management, with compliant court order earnings deduction limits and payments, including configurable custom deduction management for novated leases, and employee self-service deductions for unions and memberships.
- Automatically calculate pay results for each period and view up-to-date payroll information anytime, anywhere including process payments for employees on leave.
- Allow transparent reporting and payslips with accurate and reliable retro and retro-on-retro processing, calculating retro results in the period.
- Configure accumulations, balance periods, and balances according to your needs to use embedded reporting that can deliver on your needs.
- Support additional withholdings for your workers to make repayments for financial assistance and STSLs.

Empower workers, and unlock the potential for your payroll talent.

With Workday Payroll for Australia, enjoy simple, efficient experiences that use AI to make HR, workforce, and pay information intuitive for workers—supercharging productivity so payroll professionals can focus on their strategic role.

- Increase productivity using AI-enabled payroll prompt recommendations for commonly used tasks to free up time for strategic work.
- Save practitioner time and effort by enabling AI to audit payroll results to detect anomalies that need to be addressed.
- Streamline response to employee inquiries by embedding payroll case management within the HR and payroll system.
- Boost worker satisfaction with direct access to their HR and pay information using a conversational AI assistant and empowering them to update their Tax File Number (TFN) declaration, the Superannuation choice form, bank details, leave, and more.
- Improve workers' total remuneration knowledge with access to Workday Benefits and Pay Hub to view their pay, benefits, and Superannuation contributions.

Optimise workflows across payroll, HR, and finance with one platform.

Designed as part of a single solution alongside Workday Human Capital Management (HCM) and Workday Financial Management, Workday Payroll for Australia uses AI innovation to anticipate, orchestrate, and optimise end-to-end processes. By channeling large volumes of HR, compensation, and time data into payroll, and subsequently feeding post-payroll data into finance, transactions flow faster with increased precision.

- Capitalise on the value of having a connected solution to manage the entire worker lifecycle to attract, manage, and pay workers and to be able to navigate what comes next.
- Take advantage of the system of record in Workday for employee data across HCM and payroll to manage job changes, terminations, and life events.
- Improve accuracy with real-time, consistent data changes, such as proactively identifying issues by previewing the payroll impact on the general ledger.

To learn more about how Workday Payroll for Australia can help, visit: workday.com/en-au/products/payroll/australia.html

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Datasheet

Workday Payroll for the U.S.

Workday Payroll for the U.S. addresses a broad spectrum of enterprise payroll tasks. And because payroll is one of the most manually intensive processes in HR and finance, Workday is committed to making payroll more efficient and intelligent with continuous payroll calculations, smart payroll audits, and retro payroll processing. Workday Payroll offers the control, flexibility, and transparency you need in order to support your unique organization. Our application helps customers pay their workers accurately, on time, and compliantly. Workday Payroll goes beyond transacting by transforming businesses with higher worker engagement, maximized productivity, and increased agility.

Connected and future-ready.

Designed as part of a single solution alongside Workday Financial Management and Workday Human Capital Management, Workday Payroll for the U.S. helps you maximize your overall Workday investment.

- **Unified solution:** Capitalize on connected, real-time data by maximizing the value of employment data as well as providing a system of engagement for your workers. Organizations can maximize the value by having a single solution that helps not only to reduce payroll errors and improve accuracy, but also to simplify and enhance the worker's experience.
- **Flexible configuration:** Configure accumulations, balance periods, and worker groups for seamless scalability and compliance in a future-proof, highly configurable framework.
- **Real-time accounting:** With access to real-time reporting and analytics, finance can preview payroll impact on the general ledger even before payroll is complete.

Effortless and engaging.

Ease the burden of challenging and complex payroll processes with a single solution for an effortless experience. Empower your workers with an engaging payroll experience that streamlines processes, manages complexity, and meets them in the natural flow of their work.

Key Benefits

- Reduce costs with a single cloud-based system
- Run payroll your way with the flexibility and control to make changes and update payroll in real time
- Streamline payroll processing with an agile, automated calculation engine that handles complex requirements
- Support compliance and improve payroll accuracy with comprehensive audits
- Increase productivity and employee satisfaction with self-service to payslips, W-2s, W-4s, and payment elections
- Meet worker financial needs with model my pay and pay on-demand features

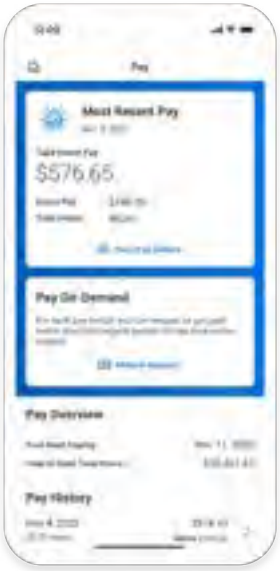
Key Features

- Continuous payroll processing
- ML-infused payroll insights and audit
- Real-time visibility into the general ledger
- Highly flexible, anytime audits
- Built-in reporting and analytics
- Mobile-first employee experience
- Automatic tax updates
- System-to-system integration with the Office of Child Support Enforcement for e-IWO

Results

- 85% reduction in payroll processing times
- 62% reduction in payroll cycle time
- Increased payroll accuracy to more than 99.9%

- **Intelligent self-service:** Support employees with a single self-service experience where they can manage their HR and payroll data to view all HR, time, and payroll information in one place.
- **Visibility into actual costs:** Companies can now see what they're spending on workers globally. Compare payroll results across periods. Take action on a pay-calculation result via a one-click report.
- **Role-based and segment-based security:** Access pay results with configurable role-based permissions. Configurable security improves collaboration, giving business partners outside of the payroll department the ability to provide input and view results before payroll completion.



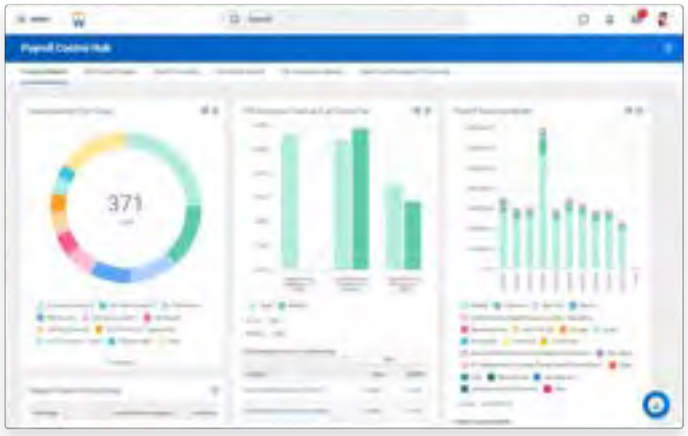
Access mobile payslips via self-service.

Autonomous and efficient.

Do more with less, and save time and cost using Workday Payroll for the U.S. that is designed to analyze, anticipate, and automate. Respond to data changes on-demand with agility and efficiency through autonomous innovations such as responsible AI and machine learning (ML) that are built seamlessly into the core of an open, connected enterprise cloud platform.

- **Continuous pay calculations:** Automatically calculate pay results for each period so you can view up-to-date payroll information anytime, anywhere. The continuous calculation in Workday streamlines payroll processing by automatically recalculating payroll results in real time as pay-impacting events occur, saving valuable time.
- **Smart calculations:** You have the flexibility to schedule smart calculations and retro processing to run automatically on the events you select, so you can focus on the changes needed to support your business.
- **Control over cost:** No more cost-prohibitive charges for reports, pay components, or calculations from service bureaus. No more costly and time-consuming mandatory upgrades from ERP providers.

- **AI and ML:** AI and ML help eliminate manual interpretation of pay rules around rates, hours worked, and overtime.



Run standard, prebuilt payroll reports or customize your own.

Seamless operations globally.

Leverage the robust system in Workday Payroll for in-depth functionality and collaborate with partners for broad coverage, ensuring seamless experiences for your global workforce.

- **Compliance:** Adhere to U.S. local legislations and be able to address any regulatory compliance changes quickly.
- **Security:** Workday is committed to protecting your data and providing a secure way for organizations to connect to third-party payroll providers around the world. Workday operates on a single and uniquely configurable security model and has implemented numerous privacy and security practices to support data processor compliance with GDPR.

Workday Global Payroll Cloud Partner Program.

Global companies that require payroll solutions beyond Workday Payroll offerings can take advantage of the Workday Global Payroll Cloud Partner Program. The program helps reduce the costs associated with deploying, integrating, and managing third-party payroll solutions.

To make integrations easier, Workday offers prebuilt integrations to partners through Workday Cloud Connect for Third-Party Payroll. Workday-certified partners build, offer, and maintain bidirectional integration, enabling payroll results to be displayed in Workday. Customers benefit by gaining a global view of payroll actuals from Workday while still being able to use local payroll providers in each country that offer their desired level of service.

WORKDAY PAYROLL FOR THE U.S.

Payroll Processing

- Calculate on any earning, deduction, or accumulation for any time period
- Calculate in batch mode for pay group, at worker level with just one click, or in real time with continuous calculation
- Calculate FLSA premiums for any FLSA work period
- Support mergers and acquisitions (M&A)
- Determine how gross-to-net is calculated for different types of payroll runs
- Define criteria for specific earnings and deductions, including gross-up calculations
- Manage each pay cycle, from preprocessing to post-processing activities, with the pay cycle command center
- Process payroll for employees who live and work in Puerto Rico, the U.S. Virgin Islands, or Guam

Earnings and Deductions

- Unlimited number of earnings and deductions
- Ability to define a set of rules for earnings and deductions
- Intuitive mapping to compensation elements or benefits from Workday HCM
- Eligibility criteria and scheduling logic for accurate processing
- Flexible worktag feature to identify unique allocations
- Labor allocations split at the employee, position, and earning levels
- Configurable arrears calculations and net-pay validations

Year-End Processing

- Leverage year-end dashboard to get access to strategic trends and metrics across the year-end process
- Manage tax forms and reconciliation
- Configure, audit, preview, and print forms W-2, W-2c, W-2PR, W-2GU, and W-2VI

Audit and Reporting

- ML-infused payroll insights and audit is an ML-driven solution that learns from historical payroll and worker data to identify and surface abnormal payroll results.
- Schedule recurring audits to run automatically
- Run common predefined reports, such as payroll register and pay calculation results
- Configure reports to display any earning, deduction, or balance values
- Create audit reports at the summary, pay group, or worker level
- View, track, and manage audit exceptions in real time via the payroll audit exception summary or the payroll audit exceptions report
- Define criteria to perform audits against pay results
- Configure new or edit current audit rules based on worker eligibility and severity levels
- Compare payroll results across periods
- Take action on a pay calculation result via a one-click report
- Configure specific earnings or deductions views for select security groups (such as managers and benefits partners)
- Export pages or reports directly to Excel or a PDF with a single click or use your data in worksheets to collaborate on teams

WORKDAY PAYROLL FOR THE U.S.

Accumulations and Balances

- Add or modify accumulations easily
- Define balance periods, even after periods have been processed
- Report on balances and accumulations

Accounting and Compliance

- Payroll chart of accounts and define account posting rules are configurable
- Payroll accounting report provides drill-down analysis
- Worktags allow for easy allocation to projects, cost centers, funds, grants, custom organizations, and so on
- Supports employer withholding obligations by performing the following tax calculations, including tax rates, wage and payment limits, and allowances:
  - Federal
  - State
  - Local
- Involuntary withholding orders and garnishments tax updates are delivered seamlessly and automatically with the Workday cloud model
- Delivers and maintains federal, state, and local minimum-wage values
- Tax-filing and web services can be integrated into the tax deposit and filing service you choose
- The payroll compliance updates dashboard provides insight into how the updates impact your employees and take appropriate action, such as:
  - Alerting employees
  - Spot-checking payroll results
  - Being ready to answer questions
- Provides system-to-system integration with the Office of Child Support Enforcement for e-IWO

Employee Self-Service

- View payslip information online or from a mobile device
- Request access to accumulated wages with pay on-demand
- Add or edit federal and state withholding elections
- Add or edit payment elections (direct deposit)
- View tax documents (W-2 and W-2c)
- Use paperless opt-in for payroll and tax documents
- Compare payslips and pay components over time with the employee pay self-service dashboard
- Enable self-service for voluntary deductions
- Pay on-demand enables workers to request early payment of a portion of their accumulated wages
- Model my pay feature gives employees the ability to estimate their pay given hypothetical changes to their earnings, deductions, and tax elections.

To learn more, watch the Workday Payroll quick demo.

Deploy Workday and get significant value, fast.

Workday offers deployment services, training, support, and continuous innovations to help you use our products with confidence as your organization evolves. Because each customer has different requirements, resources, and goals, we've designed our services to meet a variety of needs and learning styles.

To help you reach your goals faster and empower your teams, subscription-based Workday Success Plans offer exclusive access to resources, tools, and expertise for an even deeper understanding of Workday.

For more information, visit: workday.com/cx

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workday.
VNDLY

Workday VNDLY

Optimize and streamline external workforce management.

The workforce composition is changing fast, with the use of external workers set to increase year-over-year. Businesses are increasingly augmenting their workforce with extended workers to fill critical skills gaps, reduce costs, and increase agility in hiring in order to scale quickly. The ability to adapt the workforce to change is now a strategic differentiator and organizations are looking for better ways to manage this important part of their worker population.

Workday VNDLY can support you in effectively managing your extended workforce and statement of work (SOW) needs through the use of leading technology—regardless of industry or worker location. Workday VNDLY offers the latest innovations across extended workforce, SOW, and worker profile management solutions. Additionally, you can benefit from core capabilities available across the platform—including robust invoicing and rate management, self-serve configuration, comprehensive reporting and dashboards, and more.

Optimize the end-to-end lifecycle management of contingent labor.

Streamline and optimize critical processes and empower your teams to efficiently work together to support end-to-end contingent labor recruiting, SOW negotiation, external worker onboarding, local compliance requirements, and billing and invoicing, through to eventual offboarding. Having all external workforce management in one place allows you to better plan, manage, and analyze contingent labor needs and spend.

Take control of statement of work deliverables.

Find everything you need to mitigate project risk, meet deadlines, uncover cost savings, and eliminate rogue spending in one place. You gain access to detailed information about ongoing projects (including pending and past requirement modifications) and acquire the ability to build controls around processes and facilitate negotiations—all within the security of Workday VNDLY.

Workday VNDLY Solutions

- Workday VNDLY Extended Workforce Management
- Workday VNDLY Statement of Work
- Workday VNDLY Worker Profile Management

Key Benefits

- Reduce time to hire and access required skills, at the right price
- Gain complete program visibility
- Control program spend and remain in line with budget allowances
- Streamline change management processes
- Flex the workforce to meet business needs
- Drive global user adoption with local language packs
- Oversee vendor effectiveness
- Reduce manual effort and create efficiencies with business process automation
- Achieve local invoice compliance and reduce manual invoice reconciliation with preapproval requirements
- Set parameters to support adherence to local employment laws and time rules
- Improve data quality and security measures with seamless systems integration

Increase program transparency and visibility.

Gain increased visibility across end-to-end processes related to your extended worker hiring and management activities, as well as full SOW oversight. Workday VNDLY equips you with the insights needed to answer those top-of-mind questions about topics such as headcount, roles, spend, and location.

Reduce time to hire.

Quickly fill skills gaps with the right workers, as needed. Workday VNDLY enables you to optimize vendor alignment by providing vendors with insight into both current and future open roles. Expedite the hiring process for time-sensitive roles with the ability to bypass steps in the hiring process.

Strengthen financial controls.

Enforce rate thresholds to ensure candidates submitted against job requisitions are at or below your maximum rate allowance. Remain on track with project spend and adhere to set budgets with complete visibility into overall available budget, committed spend, and invoiced amount. Reduce manual invoice reconciliation with system controls that allow only approved spend to be invoiced.

Improve invoicing efficiency.

Stay on top of invoicing with batch processing or individual off-cycle invoicing. As queries related to single-line items arise, you'll be able to put them on hold while still moving other items through the process. This ensures invoicing queues don't become backed up and vendor relations related to payment remain positive.

Quickly flex to meet business needs.

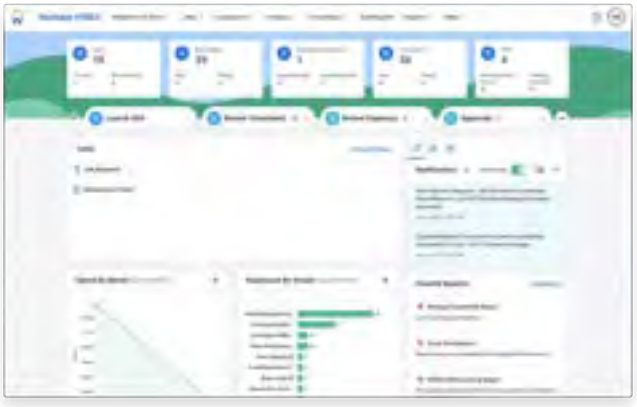
Avoid the lengthy wait times associated with support ticketing systems through user-friendly, self-serve configuration that empowers you to work in a way that makes sense for your business. You'll be able to modify approval workflows, rate cards, invoice settings, vendor distribution rules, and more.

Create an internal and external connected experience.

Drive user adoption with a cloud-based solution designed to connect all internal and external stakeholders involved in the management of your extended workers—including hiring managers, human resources, procurement, program leads and managed service providers, and vendors.

Key Features

- Essential multilingual capability
- Intuitive manager and vendor self-serve functionality
- Automated job requisition creation
- Streamlined SOW contract management and negotiation
- Convenient SOW change order requests, reviews, and approvals
- Compliant onboarding and offboarding checklists
- Simple time and expense tracking
- Succinct vendor performance management
- Robust rate card management
- Easy-to-use configuration capabilities
- Innovative invoice template builder
- Efficient batch and individual off-cycle invoicing
- Global digital invoicing
- Dynamic program dashboards



Access complete program visibility from the Workday VNDLY home screen.

Achieve global capabilities.

Access targeted functionality to support your global program needs. This includes achieving local invoice compliance with access to Workday VNDLY's invoice template builder, tax rate management, tenure policy management, extensive currency coverage, language packs, and more.

Drive better business decisions.

Acquire the insights you need to inform business decisions and maintain high program performance and control. With more than 100 base reports and its custom reporting functionality, Workday VNDLY enables you to get the data you need as quickly as possible. Dashboards offer data visualization to effectively evaluate your program, with the ability to apply filters to take a more focused view.

Align the technology ecosystem.

Improve information accuracy, remove manual effort, and increase data security with seamless systems integration. Workday VNDLY connects key technologies required for contingent labor management, including Workday Human Capital Management and other human capital management systems and procurement software, as well as identity and access management tools.

Focus on data security and compliance.

Be confident that your data is safe and secure. Data security and compliance is central to Workday VNDLY. Our certifications for ISO 27001, ISO 27018, SOC1 Type II, SOC2 Type II, and Cyber Essentials ensure we have best-in-class practices in place across our people, processes, and technology to protect your data.



Track all submitted invoices and progress through to payment with Workday VNDLY invoicing.

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Datasheet

Workday VNDLY Worker Profile Management

One system of record for your global extended workforce.

The extended workforce is rapidly growing and expanding across borders. Global organizations need complete oversight into who's where and for how long, and what their labor will cost.

Workday VNDLY Worker Profile Management allows you to capture the baseline information you need to better understand what's happening across your extended workforce program. Combined with core capabilities such as global digital invoicing, custom reporting, and self-serve configuration, Workday VNDLY can add even greater program value.

Increase visibility of your external worker population.

Capture key data related to external workers, including employment duration, location, previous assignments, organizational unit, and more. Gain added visibility with access to fully auditable activity logs.

Improve worker profile creation and management.

Optimize processes and save time across profile creation with the ability to bulk-upload worker information or add individual workers, as needed.

Strengthen financial controls.

Combine Workday VNDLY with our robust invoicing capabilities, regardless of spend or location. Reduce manual invoice reconciliation with system controls that allow only approved spend to be invoiced.

Achieve global capabilities.

Gain full visibility into all workers, regardless of where they are located. Access global digital invoicing to support local invoice compliance with extensive currency coverage to meet in-county vendor requirements.

Key Benefits

- Gain complete oversight of contingent workers
- Capture key external worker information such as location, employment duration, and assignment history
- Reduce manual effort and create efficiencies with business process automation
- Achieve local invoice compliance and reduce manual invoice reconciliation with preapproval requirements
- Gain insights into key program information to better support business decision-making
- Improve data quality and security measures with seamless systems integration

Key Features

- External employee profile creation and management
- Bulk-data upload
- Location data capture
- Start/end date visibility
- Organizational unit and resource manager details
- Unique employee ID allocation
- Worker status oversight
- Onboarding and offboarding checklist status tracking
- Assignment history
- Global digital invoicing
- Program dashboards

Drive better business decisions.

Gain complete program oversight with the ability to feed data from Workday VNDLY into headcount reporting and any related invoice spend into spend dashboards. With its more than 100 base reports and custom reporting functionality, Workday VNDLY enables you to get to the data you need as quickly as possible. Dashboards offer data visualization to quickly check your program with the ability to apply filters to take a more focused view.

Align the technology ecosystem.

Improve information accuracy, remove manual effort, and increase data security with seamless systems integration. Workday VNDLY connects key technologies required for contingent labor management, including Workday Human Capital Management and other human capital management systems, procurement software, and identity and access management tools.



Capture key information on worker profiles.

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Workday Cloud Connect for Benefits.

Workday Cloud Connect for Benefits empowers your HR organization to seamlessly integrate with benefits providers and automate the delivery of benefits offerings to your global workforce. With Workday Cloud Connect for Benefits, your organization avoids the cost and headache of building and maintaining custom integrations with a catalog of prebuilt integration templates that support industry-leading standards.

Simple setup and maintenance.

Workday Cloud Connect for Benefits features ANSI X12 834 and LIMRA Data Exchange templates that can be sent to any carrier that supports these schemas. Your benefits administrator simply selects the appropriate data elements from the available templates and adds their specific configurations themselves—reducing the need for IT resources in building or maintaining complex integrations with benefits providers' technical specifications. Workday Cloud Connect for Benefits ultimately reduces errors, drives consistency, and decreases time and effort to maintain provider integrations.

When transmitting data, administrators have clear visibility into the details of an integration event. This enables them to identify missing or incorrect data and swiftly resolve errors that may occur such as a dependent missing a national ID.

SIMPLIFY INTEGRATION

Cloud Connect for Benefits

Provides integration templates supporting industry standards and a catalog of prebuilt integrations between Workday and benefits providers, reducing the cost and resource burden of managing these integrations internally.

- Medical
- Dental
- Vision
- Insurance
- COBRA
- Spending Accounts
- Retirement Plans
- Evidence of Insurability
- Additional Benefits

Key Benefits

- Simplify administration with prebuilt integrations across all benefits options
- Minimize the burden of building your own custom integrations
- Drive consistency and improve data integrity with integration templates that support industry standards
- Track employee data changes in Workday Human Capital Management and update benefits providers automatically
- Leverage role-based security permissions for configuring, running, and viewing integrations from Workday Human Capital Management

Key Features

- Prebuilt integrations catalog
- Benefits Connector
- Supporting ANSI and LIMRA LDEx standards for electronic data interchange (EDI)

Results

- Customers report a 30% increase in the ability to automate data exchange with third-party benefits providers

Automatic updates from a single source of data.

It's a given that employees will experience life events—such as a marriage, the birth of a child, or a change of address—that must be sent to benefits providers. With Workday Cloud Connect for Benefits, those updates are quick and easy. Once changes are made in the Workday system, your benefits administrator simply schedules files to be sent or sets up ad hoc data transfers, and then integrations run automatically. The data transmitted to benefits providers is always secure—from the time it's generated to the time it's transmitted in encrypted form or via secure FTP.

Workday Cloud Connect for Benefits supports the HIPAA-compliant 834 standard in addition to the LIMRA LDEx standards for electronic data interchange (EDI). Workday is a member of the LIMRA Data Exchange Standards Committee and a partner in the ongoing development and standardization of integrations across carriers and products.

To explore how Workday Cloud Connect for Benefits can help you, please visit: workday.com/benefits

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Datasheet

Workday Contract Lifecycle Management.

Business needs to move fast—and tedious, manual contract processes can't keep up. Teams across every enterprise not only need their contracts drafted, negotiated, and signed quickly and efficiently, they also need visibility into the terms of their agreements to inform decision making, manage supply chains, stay compliant, and achieve strategic goals.

Contract AI can dramatically accelerate processing and make critical contract data easily accessible across legal, procurement, finance, HR, RevOps, compliance, M&A, InfoSec, and other teams. While traditional contract management solutions focus on incremental improvements to manual workflows, **a complete, AI-native, contract lifecycle management** platform can provide total visibility and efficiency—adapting quickly to changing needs, meeting users where they work, and supporting sustained growth and a competitive edge over time.

Enhance your entire process with AI.

Workday Contract Lifecycle Management (CLM) infuses every aspect of the contract lifecycle with powerful, purpose-built AI to automate manual tasks, surface risks and opportunities, and enhance collaboration across legal and business teams. It enables complete, end-to-end workflows along with a unified, intelligent contract repository for total visibility into the contracts that are the lifeblood of your organization. With self-service, configurable workflows and custom AI modeling, Workday CLM provides total control to implement new use cases easily as your needs evolve.



Interactive, easily customizable dashboards deliver critical insights about contracts.

Key Benefits

- Accelerate drafting, negotiation and approval
- Surface risks, opportunities, and obligations across all your contracts
- Reduce manual errors with automated processes
- Enhance collaboration across legal and business teams
- Mitigate risks through comprehensive compliance tools

Results

- Dramatically faster contract turnaround at a lower cost
- Total visibility into the contract terms that matter the enterprise
- No more missed renewals or unused financial benefits
- Stronger compliance and faster preparation for audits



Sync contracts and data points across all your repositories



Know everything about your contracts and related documents



Supercharge your contract workflows to do business faster

Get in sync, stay in sync.

Get up and running fast with a complete, intelligent contract repository. Workday CLM analyzes contracts at scale, seamlessly syncing with shared drives, cloud repositories (like Box and Sharepoint), and enterprise solutions (like Salesforce). Its unique OCR+AI process enhances low-quality scans, reads handwriting, recognizes contract types and languages, and reliably extracts standard contract terms with pre-trained AI models.

Know it all, show it all, share it all.

Surface risks, obligations, untapped opportunities, and other actionable insights easily. Workday CLM provides an "Ask AI" chat experience, advanced search and filtering, flexible reports, and interactive, customizable dashboards. It can also share structured contract data directly with other enterprise systems across the organization—to support use cases ranging from procurement, to financial planning, to HR, M&A, sales, compliance, and more.

Supercharge your workflows.

Automate every aspect of your contract lifecycle—from intake to storage—with automated workflows to eliminate manual tasks. AI redlining and clause creation speed time to close while reducing cost and risk, and self-service workflow configuration means you'll never have to wait or budget to update your process again. Workday CLM's seamless automation reduces errors, accelerates approval, and helps ensure contract language is always compliant with your corporate playbook.



Automated Redlining suggests surgical edits with AI to speed negotiations.

Sample AI-Extracted Contract Terms

- Assignment
- Change of Control
- Confidentiality
- Contract Type
- Contract Title
- Counterparties
- Data Breach
- Effective Date
- Executed (Y/N)
- Force Majeure
- Governing Law
- Indemnification
- Initial Term
- Initial Expiration Date
- Internal Parties
- Language
- Liability Cap (Amount, Currency, Text, Type, Multiple)
- Limitation of Liability
- Non-compete
- Non-solicitation
- Number of Renewals
- Payment Term (Net Days)
- Publicity Rights
- Renewal Notice Date
- Renewal Notice Period (Days)
- Renewal Term
- Renewal Type (Automatic, Option to Renew, Manual)
- Start Date
- Termination for Breach
- Termination for Convenience
- Termination for Convenience Notice (Days)
- Text Quality
- Virtually any other term desired (via custom AI model creation

Ask anything.

Glean critical information buried in your contracts via a conversational AI experience. Users across the enterprise can ask questions in simple, natural language and get clear, reasoned answers—including summaries, calculations, even nuanced rankings—with links to sources so they can act with confidence. You can even save, group, and share questions across teams to standardize pre-signature risk assessment (such as data privacy analysis for tech vendor contracts) easier access to contract insights.



"Ask AI" answers include links to sources so users across the enterprise can act with confidence.

Track everything.

Keep track of every term that matters to your organization, today and in the future. Workday CLM not only extracts common contract terms, it also lets you create custom AI models quickly and easily to track any term of interest as your needs evolve. Its sophisticated, scalable AI engine combines traditional and best-of-breed generative AI tools — including a proprietary LLM fine-tuned for contracts. The AI engine optimizes each custom model automatically, even suggesting enhanced language for user prompts to achieve the most accurate results.

Flexible, custom AI model creation means organizations can future-proof their contract AI investment.

Meet users where they work.

Make contract workflows and critical data available to users wherever they need it. Integrate Workday CLM with productivity tools (like Microsoft 365), e-signature products (like Docusign and Adobe Sign), and cloud storage and enterprise solutions that teams across your organization rely on every day. A robust API and productized integrations facilitate system connections, while self-service configuration and enterprise-grade administration controls (including the ability to customize user roles) provide autonomy and flexibility.

Core Capabilities	
End-to-End, AI-Powered Workflows	Accelerate contract processes with AI-extracted terms, and configure.
Automated Redlining	Simplify negotiation with AI-suggested surgical edits to make clauses compliant with your playbook.
Clause Library and Contract Templates	Catalog preferred and fallback contract language and templates to streamline drafting and editing.
Industry-Leading AI	Apply a multifaceted AI engine that orchestrates traditional and generative AI for optimal results.
Advanced OCR+AI Processing	Ingest and analyze contracts at scale from virtually any source or format, quickly and accurately.
"Ask AI" Across All Contracts	Ask questions in simple, natural language and get clear, reasoned answers, linked to source documents.
Custom AI Models	Future-proof your investment with self-service AI model creation including AI-powered prompt support.
Advanced Search	Find everything you need with full Boolean and semantic search and filtering across all contracts.
Customizable Dashboards	See what matters with interactive, shareable, and easily-configurable dashboards.
Seamless Integrations	Integrate with Docusign, Adobe Sign, Salesforce, Box, Microsoft Word 365, and many more.
ISO-Certified Responsible AI	Leverage one of the first AI platforms in the world to achieve an accredited ISO/IEC 42001 certification.
Advanced Administration	Customize user roles, access controls, and more for enterprise-grade provisioning and security.

To learn more about how Workday CLM can help your organization do business with greater efficiency, visibility, and compliance, visit www.evisort.com/tryevisort.

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Datasheet

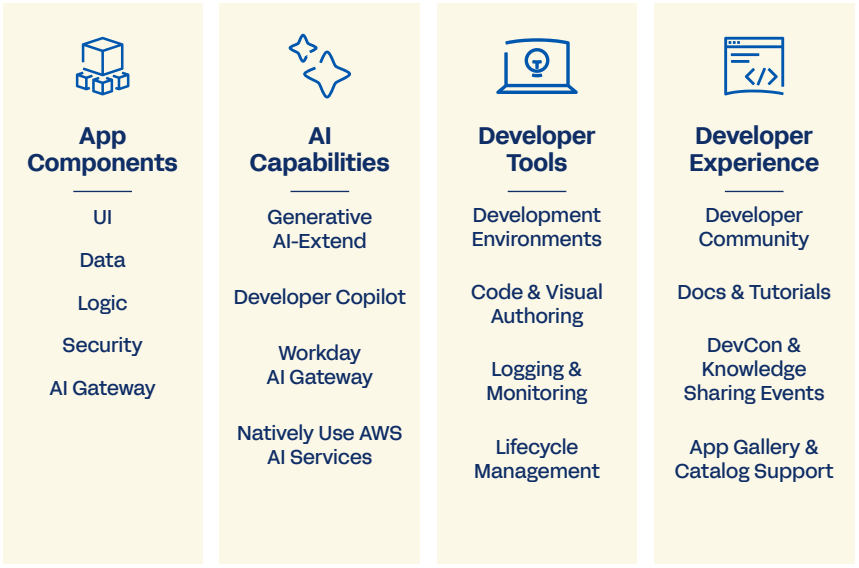
Workday Extend: the power to build.

Workday is a finance and people-focused platform designed to help your business continuously adapt and grow in an ever-changing world. With Workday Extend, your business and IT teams can amplify your Workday platform investment by building unique finance and people apps at scale.

Workday Extend provides a low-and-no code developer experience, where teams build collaboratively through intuitive, browser-based tools. Business Experts become builders and professional developers improve development speed as they focus on more complex coding needs.

With Workday Extend, you build in the right place. Workday Extend apps are built by extending Workday platform data, business processes and user experience. Teams build with confidence, taking advantage of data context and security. And Workday Extend is built for interoperability. Teams can build Extend apps that connect and orchestrate processes and data across Workday and third-party systems, crafting apps that advance the intuitive Workday experience and connect processes across the enterprise.

Build unique apps with Workday Extend.



Workday Extend apps leverage components within the Workday platform.

Key Benefits

Confidently build new capabilities by extending Workday:

- Create apps with trusted Workday data and processes
- Seamlessly add new functionality within the Workday UI
- Collaborate and build faster with low-and- no-code tooling

Seamlessly leverage Workday security and trust:

- Inherit and extend the Workday security model
- Always-on auditability
- Update safe

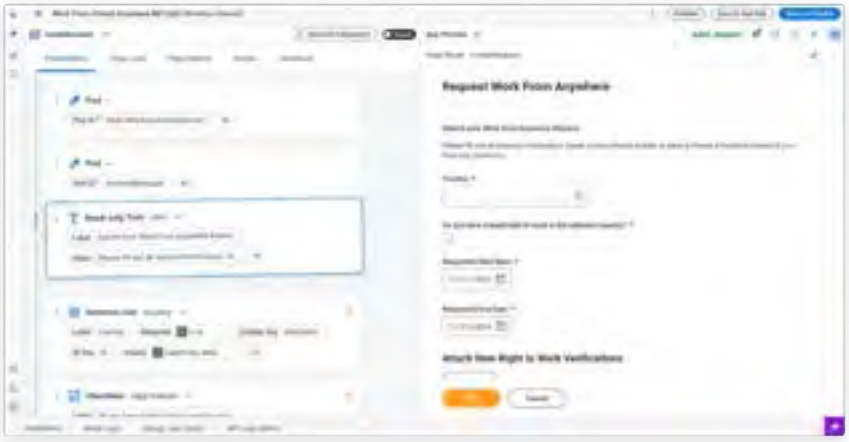
Scalably interconnect with other systems:

- Enable process automation and orchestration
- Create and publish APIs
- Establish real-time connections

Unlock low and no-code development with Workday Extend app builder and Workday Orchestrate.

App builder provides low-and-no code tooling for building apps with Workday Extend. Workday Extend app builder capabilities include building app pages visually and an in-tool app preview capability reducing the time it takes to build and deliver new apps.

With app builder, builders can create, edit and preview Extend apps through a “build with clicks” model. And when developers want to interact with code, they can toggle to code mode at any time.



App builder visual mode–build a page with clicks.

Workday Orchestrate enables developers to orchestrate data and processes between Extend apps and other systems. Developers can visually create powerful orchestrations consisting of intra-Workday and cross-application workflows.

Scale up with Workday Extend Professional.

Workday Extend is available in two versions: Workday Extend Essentials and Workday Extend Professional. Workday Extend Professional builds on the low-and-no code capabilities of Workday Extend Essentials, accelerating development at scale and unlocking responsible AI innovation for your professional developer teams.

	Extend Essentials	Extend Professional
App Builder	✓	✓
Workday Orchestrate	✓	✓
Fixed Annual Price	✓	✓
Apps in Development	Unlimited	Unlimited
Data–Model Instances	10M	100M
Apps in Production	3*	10*
Developer Tenants	1	3
Developer Support Contacts	3	5
Extend Developer Copilot		✓
Workday AI Gateway		✓
Native AWS Integration		✓

*Customers can purchase additional app packs.

Innovate with responsible AI services: Workday AI Gateway.

Workday Extend opens up responsible AI services for developers through the Workday AI Gateway. This provides a continuous pipeline of Workday-delivered AI capabilities that Workday Extend Professional developers can leverage within their Extend apps to accelerate processes, assist users, and transform operations.

Workday AI services continuously learn from the highest-quality set of financial and HR data. With the Workday AI Gateway, developers build confidently, knowing Workday delivers AI responsibly, keeping ethics, customer trust, and transparency all core to our approach.

Best of both worlds: Workday managed and secured AWS services.

With Workday Extend Professional, developers have fast and secure access to powerful technologies from leading providers. Access AWS hyperscale developer technologies including AWS Lambda to build custom functions, AWS S3 for storage, AWS Event Bridge for orchestration, and multiple AWS AI and machine learning (ML) services through a Workday-managed account.

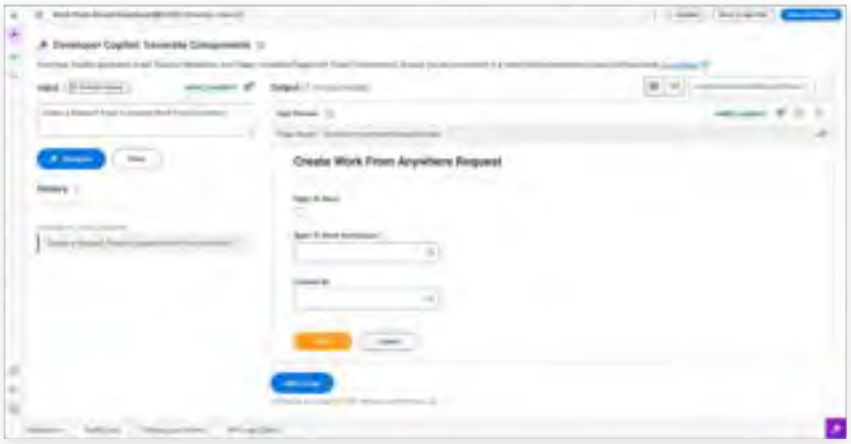
Key benefits of Workday Extend Professional.

- Extend Workday at scale with more apps, more data, and more developer capacity
- Apply AI responsibly as you build with access to a continuous pipeline of Workday AI APIs through the Workday AI gateway
- Get the best of both worlds–access to innovative AWS services secured and managed by Workday
- Skill up and build apps faster through generative AI-enabled development with Workday Extend Developer Copilot

Your generative AI developer companion–Workday Extend Developer Copilot.

Included with Workday Extend Professional, Workday Extend Developer Copilot uses the power of generative AI to boost developer productivity. Workday Extend Developer Copilot helps Workday developers build Extend apps and learn new technologies faster.

Workday Extend Developer Copilot provides Natural Language Prompt support for search, summarization, chat and code generation.



Workday Extend Developer Copilot—your generative AI developer companion.

Discover the possibilities of Workday Extend apps.

Enhance recruiting and onboarding, employee engagement and compensation experiences. Address unique financial processes, integrate with industry systems, support student enrollment and academic success. With Workday Extend, you have the power to build **unique apps** that run within your existing Workday Human Capital Management (HCM), Workday Financial Management, and Workday Student product portfolio.

Leverage the Workday Extend developer community to innovate faster.

The Workday Extend app catalog, available on the Workday developer site, offers customers a curated library of Extend app templates and reference apps for finance, HR, and industry-specific needs. These resources can be quickly configured and deployed, accelerating the delivery of Extend apps.

Additionally, Workday Extend partners provide a range of services and solutions to help customers expedite the design, implementation, and deployment of their Workday Extend apps. With a thriving community of thousands of developers building new people and money apps, we're continuously expanding the value of Workday.

Explore how Workday Extend can empower your organization to support innovative programs, adapt to unique operational needs, respond swiftly to unforeseen events, and optimize your IT systems. Build precisely what your organization requires for finance and HR, while responsibly innovating with cutting-edge AI capabilities.

To learn more, visit: **workday.com/extend**

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Workday Prism Analytics.

Today's business environment moves at an incredible pace. To stay competitive and be successful, organizations must be highly adaptive. Business leaders must get the most value out of their data and put insights into the hands of the workforce, empowering everyone within the organization to make more confident decisions. Gartner® recently reported that "increasingly, data and analytics has become a primary driver of business success, and the potential for data-driven business strategies is greater than ever."

Unfortunately, companies are struggling to put their data to work. In an Accenture study, only 33% of firms reported they trusted "their data enough to use it effectively and derive value from it." Executives and practitioners have limited trust in their organization's data, bringing information together is time-consuming and complex, and limited insight impedes strategic decision-making.

Workday Prism Analytics addresses these challenges for both finance and HR, while helping IT teams simplify systems, reduce spend, and decrease the amount of effort needed to maintain legacy systems. With Workday Prism Analytics, finance and HR now have a data hub built right into the system of record, bringing together the data they need while maintaining fidelity, providing access to decision-makers without compromising security, and supplying intuitive tools that make insights from disparate data sources easier to generate and consume. Get ready to make better business decisions and drive performance like never before.

Complete view of the business.

Executives, managers, and decision-makers across the business often rely on much more than financial and HR information to make decisions. They need data from other places such as their CRM, vendor management, LMS, engagement, or industry-specific systems to get a full picture of business performance. Workday Prism Analytics makes it easy to get a current, reliable, and singular view of the business by bringing all that data together with integration and data management capabilities, all inside of Workday. Users can create reports, surface granular insights, and seamlessly and securely distribute at scale across the organization.

Automation and efficiency.

IT teams get worn out trying to service analytics requests from the business, reel in shadow access, and maintain multiple security models. Workday Prism Analytics lets IT teams set security once with flexible governance that adapts and fits the needs of the business. And because Workday Prism Analytics is a fully cloud-based service, we do the heavy lifting to maintain

Key Benefits

Integrated Security

- Keep sensitive financial and workforce data in Workday and integrate external sources as needed
- Set role-based permissions that adapt as your organization changes

Democratized Insights

- Share data, reports and insights across cross-functional teams to make faster, more confident decisions from the same source of truth
- Provide self-service access to anyone within your organization with reports and dashboards available on any device

In Context Experience

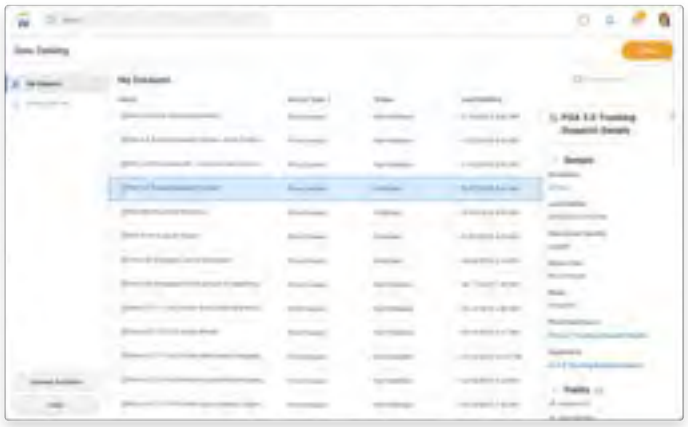
- Gain complete visibility into the analysis with transparent and user-friendly data lineage capabilities for trusted and accurate decision-making
- Enable any stakeholder to access the full, relevant context of any reports or insights through an intuitive and familiar click-not-code interface

Product Capabilities and Features

Data Integration and Management

- Bring in data from any source via API, SFTP, browser-based file uploads, or our out-of-the-box connectors, including AWS S3
- Access finance and HR transactional data from Workday
- Schedule automatic updates to keep your data synced and current
- Easily search, discover, and manage datasets in a single data catalog
- Quickly understand how pipelines are constructed with data lineage

and update software. This enables IT teams to deploy faster, while still getting the performance and scalability of Hadoop, Spark, and the latest storage and processing technologies.



The data catalog, part of Workday Prism Analytics.

Accelerated time to insight.

When it comes to analytics, business analysts have long been limited in their ability to get access to data and quickly produce insights. With Workday Prism Analytics, analysts gain a secure playground of business data that they can prepare, blend, and analyze with point-and-click functionality. Users can efficiently manage and transform data for any type of reporting, analytics, or planning use case with robust auditability and data lineage capabilities baked into the platform—no coding or special licenses required. They can then share these insights with the colleagues and executives who need them.



Managing data pipelines with Workday Prism Analytics.

To explore how Workday Prism Analytics can help you drive business outcomes, visit: https://www.workday.com/en-us/resources/prism-analytics/data-hub-use-cases.html

Data Governance

- Govern data using the Workday security framework
- Apply role-based and contextual security for personalized access
- Separate duties with different permissions for dataset creation and publishing
- Set table-level security and sharing controls

Self-Service Preparation

- Create and maintain data transformation pipelines with an intuitive interface
- Apply join, union, group-by, and filter functions to datasets
- Build computed fields by leveraging a rich function library
- Preview data transformations to ensure data is what was expected
- Get a visual profile of fields in the dataset to understand statistics, such as distribution

Productionalized Insights

- Query large-scale datasets with an in-memory high-performance analytics engine
- Use data sources from Workday Prism Analytics in Workday reports, dashboards, and scorecards
- Access insights generated from Workday Prism Analytics from a desktop, tablet, or mobile device
- Share insights with anyone within the organization

workday.

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Services and support for successful outcomes.

With Workday, you're never alone. We offer deployment services, training, support, and continuous innovations to help you use Workday with confidence. Because each customer has different requirements, resources, and goals, we've designed our services to meet a variety of needs and learning styles to help you realize your desired outcomes in today's changing world.

Workday is committed to your success—well beyond a smooth deployment. As our customer, you're part of a powerful community of Workday teams and expert partners, and one of the most collaborative peer groups in the industry. From self-service resources and shared best practices to education and 24/7 support, you're empowered to get the most out of Workday today, tomorrow, and every day.

With Workday, there's no limit to what you can achieve.

For more information, visit: **workday.com/cx**



End-user opt-in.

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Datasheet

Workday Success Plans

Workday Success Plans deliver a success multiplier on your Workday investment. Designed to help your business adapt and thrive in this new age of work, our subscription-based plans give you direct access to an extensive network of experts; proactive, ongoing problem-solving; services that build team competency; and a rich library of education and self-guided resources right-sized for your needs.

Choose the right plan for your business goals.

Offering you continuous, proactive support with measurable results, **Workday Success Plans** are designed to grow with your business while maximizing the impact of your Workday investment. If you work with a third party, Workday Success Plans can help you develop your internal capabilities to improve self-reliance and achieve a balance that best fits your needs and budget. Choose from three flexible plans:

- **Accelerate Essentials** empowers lean teams to solve problems faster, with education, self-guided tools, and expert guidance on-demand. Builds on the resources standard with all Workday products.
- **Accelerate** enables your team to deploy, adopt, and optimize your Workday platform with tailored deployment guidance, in-tenant advice, and on-demand learning to expand your team's Workday expertise and help you keep pace with innovation. Builds on the resources included in the Accelerate Essentials Plan.
- **Accelerate Plus** provides premier technical and strategic guidance including one-to-one support from a technical account manager, comprehensive guidance during deployment, and adoption and governance strategies to power your success. Builds on the resources included in the Accelerate Plan.

Workday Success Plans multiply the impact of your Workday investment.

> Workday Success Plans customers adopt 25% more Workday features compared with customers not on a Workday Success Plan.

Workday Success Plans can also help you enhance the value of Workday Illuminate™—our next-generation AI. We can help you connect the dots between your business objectives and Illuminate capabilities, keep pace with AI innovation, and elevate your team's skills to feel more confident embracing AI.

Key Benefits

- Connect the dots between your business objectives and Workday capabilities.
- Increase productivity and efficiency, elevate skillsets, and inspire your team.
- Keep pace with innovation.
- Realize the full value of Workday Illuminate—our next-generation AI.
- Deploy with confidence and drive value from day one.
- Focus on the road ahead with comprehensive global support.

Key Features

- In-tenant guidance for configuration and adoption
- In-depth, expert-led education and just-in-time learning on-demand
- Guidance during deployment on testing, change management, and more
- Access to analytics, reporting, integrations expertise, and more throughout life in production
- Help in building and evolving your adoption strategy and planning and refining your governance and support model
- Global support and access to one-to-one technical account management

Standard	Accelerate Essentials Plan	Accelerate Plan	Accelerate Plus Plan
Included with all Workday products	Builds on the resources standard with all Workday products	Builds on the resources included in the Accelerate Essentials Plan	Builds on the resources included in the Accelerate Plan
• Access robust online resources to get you started with Workday. • Contact customer support with contractual response times. • Connect and collaborate with the Workday Community. • Learn from customer collaboration forums, knowledge articles, and product learning series.	• Access one-to-one, in-tenant configuration and adoption guidance from Workday experts. • Solve on-the-job challenges swiftly with on-demand, just-in-time learning. • Boost team confidence in managing Workday with live and on-demand webinars. • Focus on the road ahead with comprehensive global support available 24/7/365 at all severity levels.	• Get tailored guidance during deployment on change management, testing, project management, and more. • Maximize end-user adoption with personalized change management guidance throughout life in production. • Elevate skillsets and inspire your team with in-depth, expert-led education. • Identify feature adoption opportunities that align to your business objectives with detailed tenant assessments.	• Drive value through deployment and beyond with premier technical and strategic guidance. • Minimize disruption and get peace of mind with one-to-one technical account management that helps you solve issues before they arise. • Get comprehensive guidance during deployment on operational success, testing, change management, and more. • Access expertise on analytics, reporting, integrations, and more throughout life in production. • Build an adoption roadmap tailored to your goals and define and manage a governance plan for ongoing success. • Test Workday features in a secure, dedicated environment with one private demonstration tenant and one additional standard implementation tenant for core Workday products at no additional fee.



We decided to go with Workday Success Plans to help continue our education, grow our internal resources, and develop our skills in order to support our long-term vision of Workday.

Product Manager
Vertex Education LLC

Connection and Engagement Collaborate, spark ideas, and share challenges with peers through Workday-facilitated small-group sessions, Workday Community, and more.	**Standard Resources**	**Accelerate Essentials**	**Accelerate**	**Accelerate Plus**
Community Access	●	●	●	●
Workday Rising Passes			●	●
Collaboration Crews			●	●

Education and Learning Access robust, on-demand training and education that enables your team to expand their Workday expertise like never before.	**Standard Resources**	**Accelerate Essentials**	**Accelerate**	**Accelerate Plus**
Workday Pro—Exam Fee Waiver	●	●	●	●
Learn On-Demand		●	●	●
Workday Adaptive Planning Administrator Training Kit		●	●	●
Workday VNDLY Administrator Training Kit		●	●	●
Workday Administrator Library			●	●
Product Overview Trainings	●	●	●	●
Feature Release Reviews (Webinars)		●	●	●

Self-Guided Tools From change management to testing, governance, and adoption kits, access self-guided tools and resources on the go.	**Standard Resources**	**Accelerate Essentials**	**Accelerate**	**Accelerate Plus**
Usage Monitoring	●	●	●	●
Adoption Kit		●	●	●
Testing Guidance Kit	●	●	●	●
Change Management Guidance Kit	●	●	●	●
Support Model and Governance Kit	●	●	●	●
Implementation Tenant				●
Demonstration Tenant				●
Feature Accelerator Library		●	●	●

Expert Guidance and Insight Enjoy direct access to personalized, one-to-one advice through deployment and beyond. Set yourself up for success with expert guidance that helps you connect the dots between your business objectives and Workday capabilities.	**Standard Resources**	**Accelerate Essentials**	**Accelerate**	**Accelerate Plus**
Governance Planning				●
Strategic Planning				●
Feature Adoption Assessment			●	●
Feature Adoption Workshop				●
Ask-an-Expert		●	●	●
Accelerator Webinars (Live Experts)		●	●	●
Feature Accelerator Coaching				●
Deployment Guidance Services			●	●

Optimization Packages

Get access to expertise when you need it to guide you throughout life in production. From change management to analytics, reporting, integrations, and more, Optimization Packages can help with a menu of fixed-scope packages that provide personalized guidance.

Functional Review			●	●
Change Management Guidance			●	●
Analytics and Reporting Guidance				●
Operational Success				●
Technical Guidance				●
Health Checks				●

Technical Account Management Get technical expertise when you need it with technical account management.	**Standard Resources**	**Accelerate Essentials**	**Accelerate**	**Accelerate Plus**
Tenant Capacity and Go-Live Readiness				●
Security Risk Mitigation Review				●
Event Management				●
System Health Insights				●
Incident Management				●
Operational Review				●
Service Availability/Root Cause Analysis Reviews				●
Additional Alerts				●

Support Rest easy with global support available for all severity levels.	**Standard Resources**	**Accelerate Essentials**	**Accelerate**	**Accelerate Plus**
Technical Support (24/7 P1, 24/5 P2–P5)	●			
Technical Support—Accelerate Essentials (24/7 P1–P5)		●		
Technical Support—Accelerate (24/7 P1–P5)			●	
Technical Support—Accelerate Plus (24/7 P1–P5)				●

Workday Success Plans offer flexible, results-oriented support that grows with your business. No matter where you are in your Workday journey, there's a Workday Success Plan designed to help you reach your business goals. **Learn more.**

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