

Workday Release Preparation Guide

It's that time of year again: WD2024R2 is almost here!



Whether your organization is preparing for your first Workday release or your tenth, we've put together our best resources, tips, and checklist to ensure you are well-prepared for each release.

What resources will I receive?

As part of our Workday update bundle, your account or service delivery lead (EM, SDM, PA) will provide the following resources:

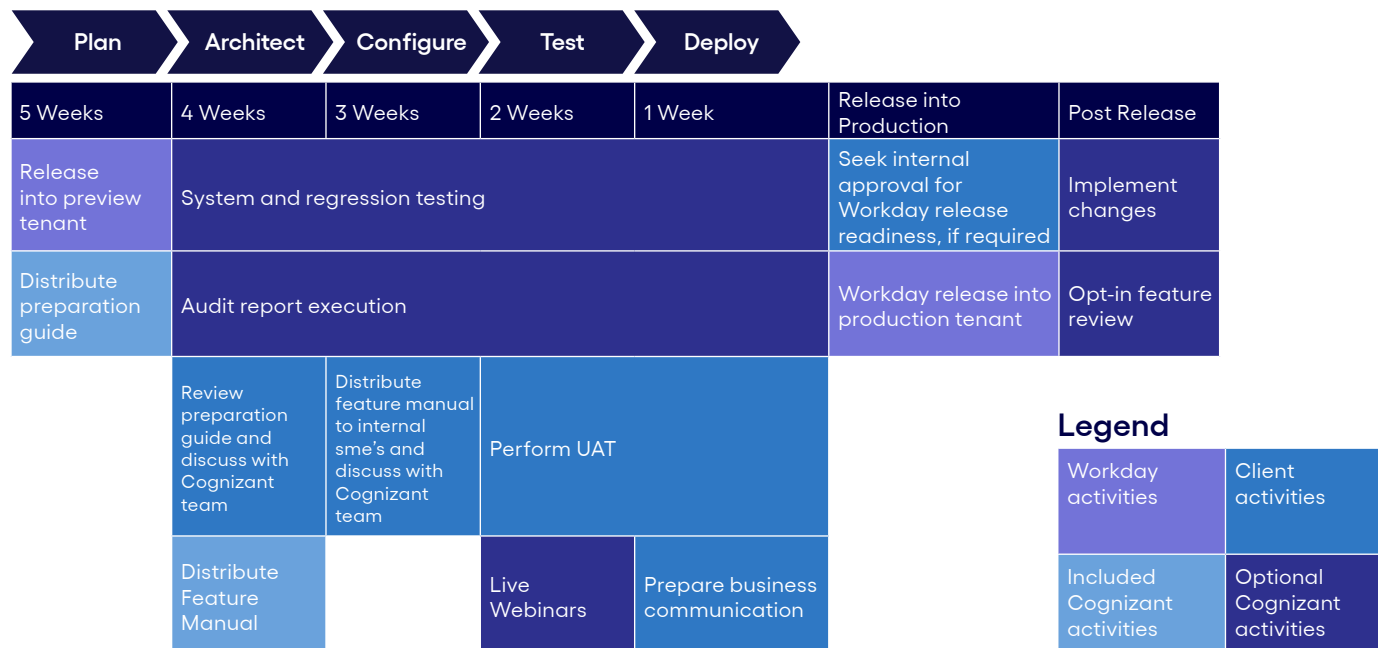
1. Feature Manual: A curated bundle of resources to help your organization prepare for each Workday release.

The feature manual provides you:

- A detailed view of the top release features selected by Cognizant subject-matter experts
- An outline of each feature in the upcoming release and notes on required vs. automatically available features
- Easy-to-find direct links to Workday community for each feature and details around why the Cognizant team is excited for this release
- Workday-provided guidelines for assessing training, criticality and impact

2. Webinars: Take a deep dive on some of the latest and greatest requested release features! The Cognizant team will be hosting webinars to demonstrate the top features.

Recommended release timeline



Workday releases

Workday delivers two mandatory releases per year, in March and September. Some features are automatically available while others require additional setup.

Feature release name: WD2024R2

Start of release preparation window: August 17, 2024

Feature release delivery: September 21, 2024

Visit the [Workday feature release schedule](#) for more information.



Additional service offerings

The Cognizant team is ready to help if your organization needs additional support preparing for the upcoming release. Here’s an overview of our additional services:

Audit reports



Run recommended reports against your current release and the upcoming release to compare results. Our team will help your organization understand report findings and assist with resolving exceptions, e.g., Business process exception audit, security exception audit, custom report exception audit. Cognizant has provided an updated checklist below to further assist with the upcoming release and can walk you through with any questions and findings.

Release Plus Package

We are continuing to offer three different levels of the Release Plus Packages to further provide you proactive guidance and release process support. Package levels can span from audit report templates, mandatory feature reviews, and testing to accommodate you specific business support needs. If you would like to proceed with one of the packages, you will need to submit a Salesforce Service Cloud case indicating the specific Release Plus Package option in the title, no later than August 13th. Please reach out to your EM/SDM/PA for additional information.

Task	Option 1	Option 2	Option 3	Additional Add-on
Advisory support	✓	✓	✓	
Audit template	✓			
Testing best practice guide	✓	✓	✓	
Cognizant conducted audit		✓	✓	
Weekly status calls		✓	✓	
Consulting on 7 automatic available features across 2 modules		✓	✓	
Regression testing BP's, reports, integrations			✓	
Impact review with heatmap			✓	
Module regression testing				✓
Testing manager				✓
Estimated hours	10	20	40-100	✓

Impact assessment



Determine if there are specific processes that require further impact assessment and receive a like-for-like comparison of the processes pre- and post-release and associated findings.

System and regression testing



Test tried-and-true preconfigured test scenarios from previous releases or custom test scenarios to meet your requirements, e.g., Hire, change job, propose/request compensation change. Test management services can also be provided, includes test plan and scenario development and execution.

Release review



Receive a custom Feature Manual for your organization and a presentation based on your specific requirements, including a workshop with your team to discuss potential impacts of each feature.

Advisory services



Plan and execute a strategy for rollout of one or more release features. Develop new or update existing training materials, in-system guidance support (guided tours, tenant branding, announcements, etc.), Training, communications, user adoption plan, or other targeted efforts, as determined based on unique needs.

Develop and implement changes



Your organization may need configuration changes upon review of new features or changes to existing features. Our team will assist with developing changes to prepare for production after go-live, e.g., custom validations to prohibit users from accessing new features, updating custom reports, security or business process changes, etc.

These services can be performed by Cognizant as part of your contracted hours or as a separate statement of work as required. A detailed effort estimate will be provided for each.

If you have further questions or would like additional support, please reach out to your account or engagement manager.

WD2024R2 Customer Feature Release Checklist

Item	Comments	Status
Pre-Feature Release – WD2024R2 Production		
Activate all 'pending' security changes before upgrading to WD2024R2.		
Run the Business Process Exception Audit (Business Process Administrator)	Resolve any identified critical Business Process exceptions.	
Run the Business Process Policy View Audit (Security Administrator)	Resolve any BP policy view issues.	
Run the Business Process Definitions with Integration Steps using Deprecated Fields Audit (Business Process Administrator)	Resolve any BP issues.	
Run the Organization Exception Audit (Organization Administrator)	Resolve any identified organization issues.	
Run the Security Exception Audit (Security Administrator & Security Configurator)	Resolve any identified critical security exceptions.	
Run the Custom Report Exception Audit (Security Administrator & Report Writer)	Resolve any identified critical report exceptions.	
Run the All Custom Reports with "Do Not Use" Items (Setup Administrator)	Update invalid report values.	
Run the Calculated Field Exception Audit (Security Administrator)	Resolve any identified critical calculated field exceptions.	
Run the Condition Rule Exception Audit (Business Process Administrator)	Resolve condition rule exceptions.	
Run the Condition Rules using Deprecated Fields (Business Process Administrator)	Update invalid condition rules values.	
Run the Unfilled Roles Audit (Business Process Administrator & Organization Administrator)	Resolve any role issues.	
Run the Integration Exception Audit	Review and Resolve any issues.	
WD2024R2 sandbox preview testing		
Review What's New Report for WD2024R2 which includes all Feature Considerations	Published August 9, 2024	
Run the Business Process Exception Audit (Business Process Administrator)	Resolve any identified critical Business Process exceptions.	
Run the Business Process Policy View Audit (Security Administrator)	Resolve any BP policy view issues.	
Run the Business Process Definitions with Integration Steps using Deprecated Fields Audit (Business Process Administrator)	Resolve any BP issues.	
Run the Organization Exception Audit (Organization Administrator)	Resolve any identified organization issues.	
Run the Security Exception Audit (Security Administrator & Security Configurator)	Resolve any identified critical security exceptions.	
Run the Custom Report Exception Audit (Security Administrator & Report Writer)	Resolve any identified critical report exceptions.	
Run the All Custom Reports with "Do Not Use" Items (Setup Administrator)	Update invalid report values.	
Run the Calculated Field Exception Audit (Security Administrator)	Resolve any identified critical calculated field exceptions.	
Run the Condition Rule Exception Audit (Business Process Administrator)	Resolve condition rule exceptions.	
Run the Condition Rules using Deprecated Fields (Business Process Administrator)	Update invalid condition rules values.	
Run the Unfilled Roles Audit (Business Process Administrator & Organization Administrator)	Resolve any role issues.	
Run the Integration Exception Audit	Review and Resolve any issues.	
Post-feature release – WD2024R2 production		
Ensure to unlock user accounts if you had locked all accounts during the update (It is best practice to do this).	Select the 'unlock user accounts' option from the Manage User Accounts task.	
Activate Sessions for Workday Accounts if user sessions were terminated during the update.	Use the 'Manage Workday Maintenance Window' task to activate the sessions.	
Re-enter any configuration changes that were made in your Sandbox Preview tenant.		
Rerun audits listed above.	Resolve audit issues.	
Review the Retired Functionality Reference for WD2024R2 when it becomes available	Make note of any upcoming retirements and corresponding required actions	