Workday 2024 R2 Release Impact Analysis

Customer contracts

2024

Customer contracts

Automatically available features

Customer contracts - Custom validations on customer invoice proposals

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What's changing

With the 2024R2 release, Workday now extend custom validations that you configure for customer invoices to apply to customer invoice proposals.

Additional considerations

If you want to disable custom validations for customer invoice proposal then In the Set Up Project Billing Configuration task, on the Billing tab, you can deselect Enable Custom Validations for Customer Invoice Proposals check box.

If you want any custom validation that apply to customer invoices but should not apply to customer invoice proposal then you can create a condition rule with these values:

- And/Or: And
- Source External Field or Conditional Rule: Is Document a Customer Invoice Proposal
- Relational Operator: not equal to
- Comparison Type: Value specified in this filter
- Comparison Value: Select the check box

What do i need to do?

You'll need to customize your existing validations under the Customer Invoice context in the Maintain Custom Validations task for validations that use report fields that exist in the customer invoice workflow but not in the customer invoice proposal workflow.

If these validations trigger in the customer invoice proposal workflow, you won't be able to correct them because the fields don't exist in the proposal workflow.

Alternatively, you can temporarily disable the feature by clearing the Enable Custom Validations for Customer Invoice Proposals option in the Set Up Project Billing Configuration task on the Billing tab, to give you time to adjust your existing validations accordingly.

What happens if i do nothing?

The feature is automatically enabled, and custom validations created for the Customer Invoice context will automatically apply to customer invoice proposals.

Community link

https://doc.workday.com/release-notes/en-us/finrev/7923116.html

cognizant

Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
No custom validations for customer invoice proposals.	A new field Enable Custom Validations for Customer Invoice Proposals has been added in the Set Up Project Billing Configuration task on the Billing tab. If the field is enabled then all custom validations configured for customer invoices shall apply to customer invoice proposals.	**Y/N:** Yes **Impact description:** Create own validations and guardrails for customer invoice proposals, ensuring that data is correct without having to wait until the invoicing stage.

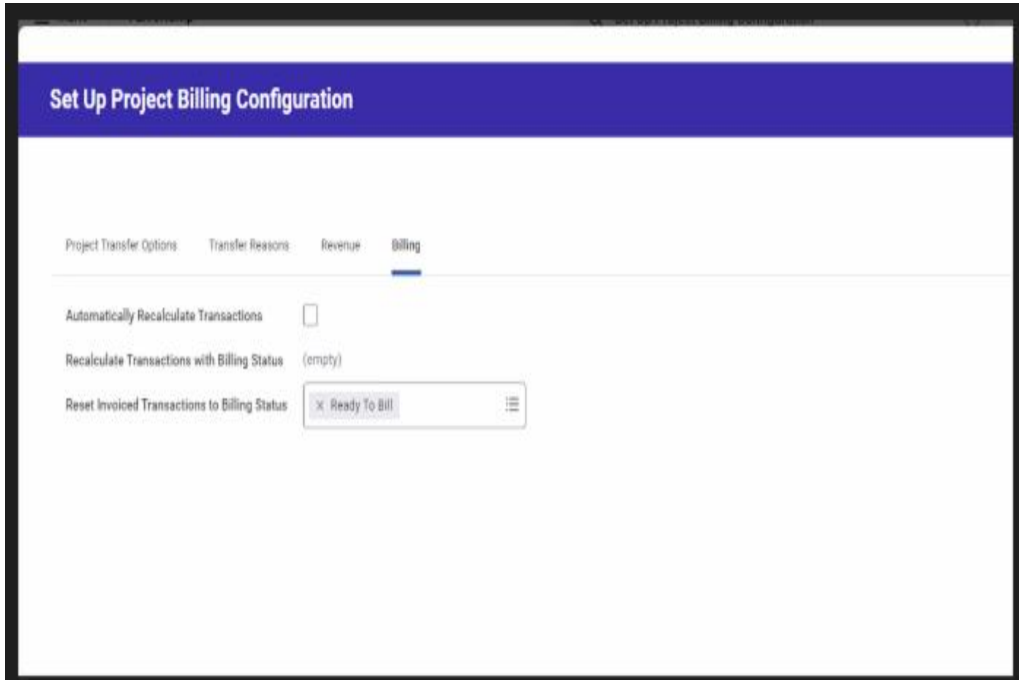
Effort 0.5 Hours

Defect link N/A

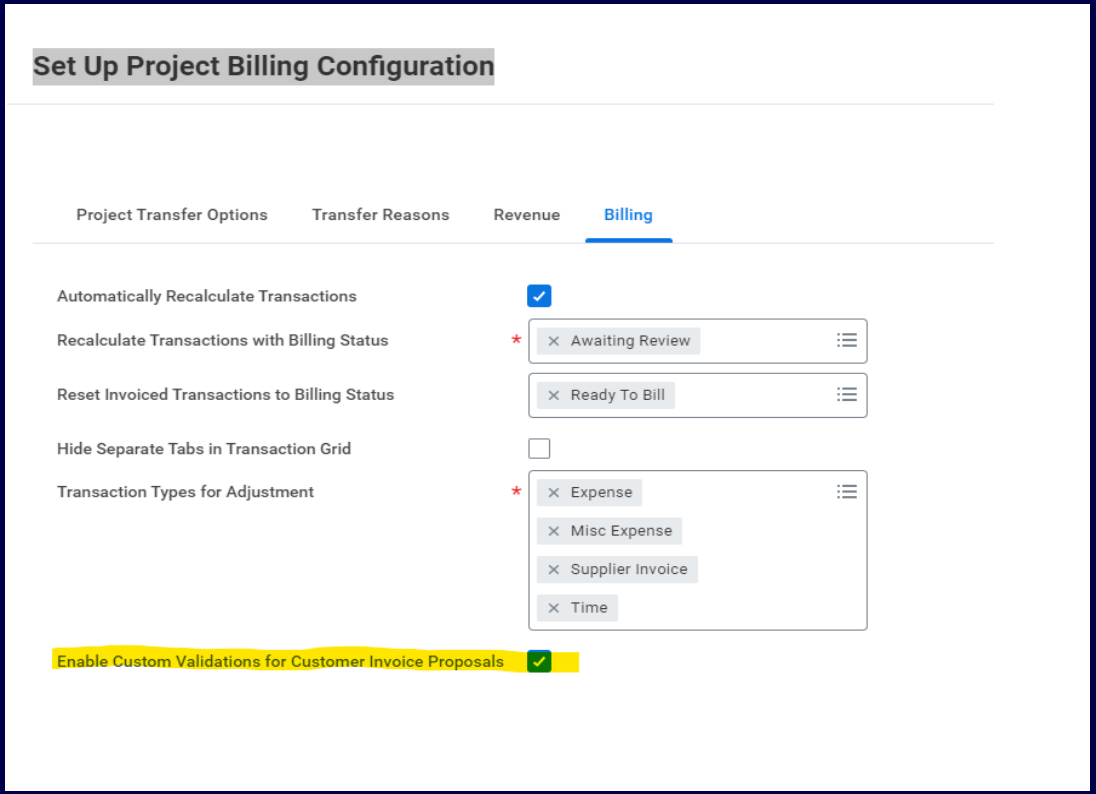
Community link https://doc.workday.com/release-notes/en-us/finrev/7923116.html

Workday 2024R2 automatically available features

Before release



After release



Customer contracts - Aging summary cards on manage project billing transactions

What’s changing

With the 2024R2 release, you can now collapse the Aging Summary cards on the Manage Project Billing Transactions task's summary page by default, which brings the transaction grid higher on the page.

Additional considerations

N/A

What do i need to do?

Workday recommends that you update your training materials so that users are aware of the changes.

What happens if i do nothing?

Users will see the Aging Summary cards collapsed on the Manage Project Billing Transactions task's summary page.

Community link https://doc.workday.com/release-notes/en-us/finrev/8031565.html

Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
Aging Summary cards on the Manage Project Billing Transactions task's summary page were not collapsed by default	Aging Summary cards on the Manage Project Billing Transactions task's summary page **is collapsed by default**, which brings the transaction grid higher on the page.	Y/N: No Impact description: N/A

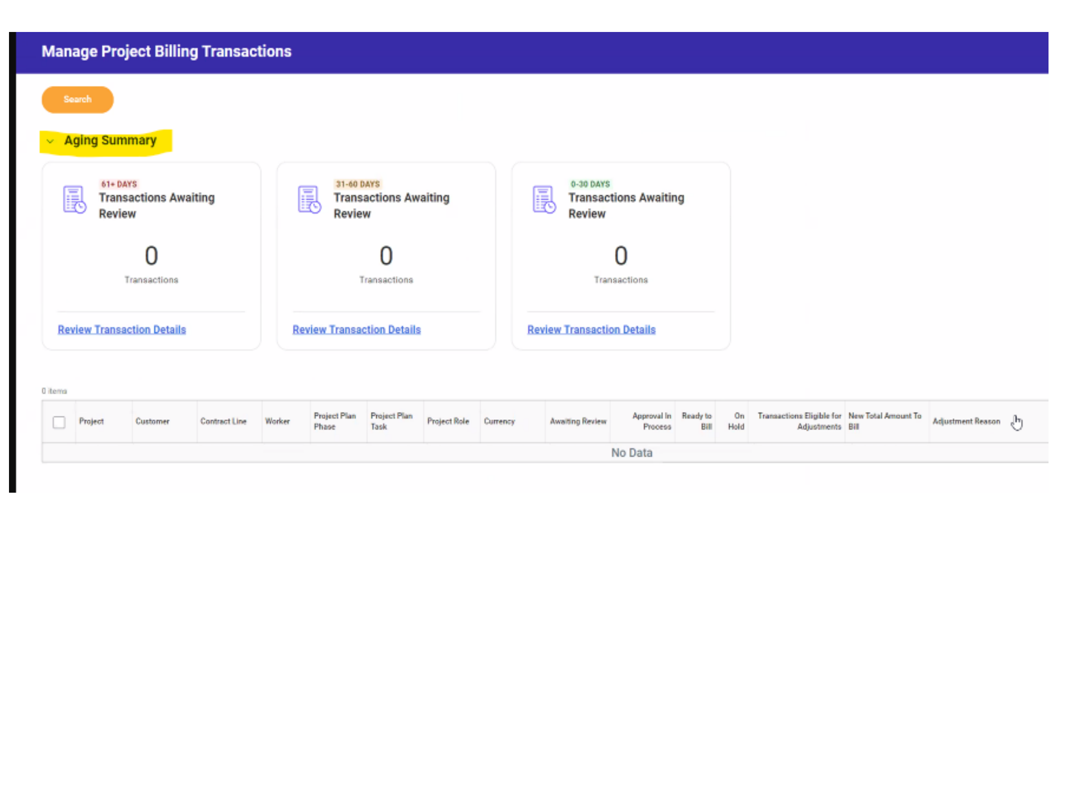
Effort N/A

Defect link N/A

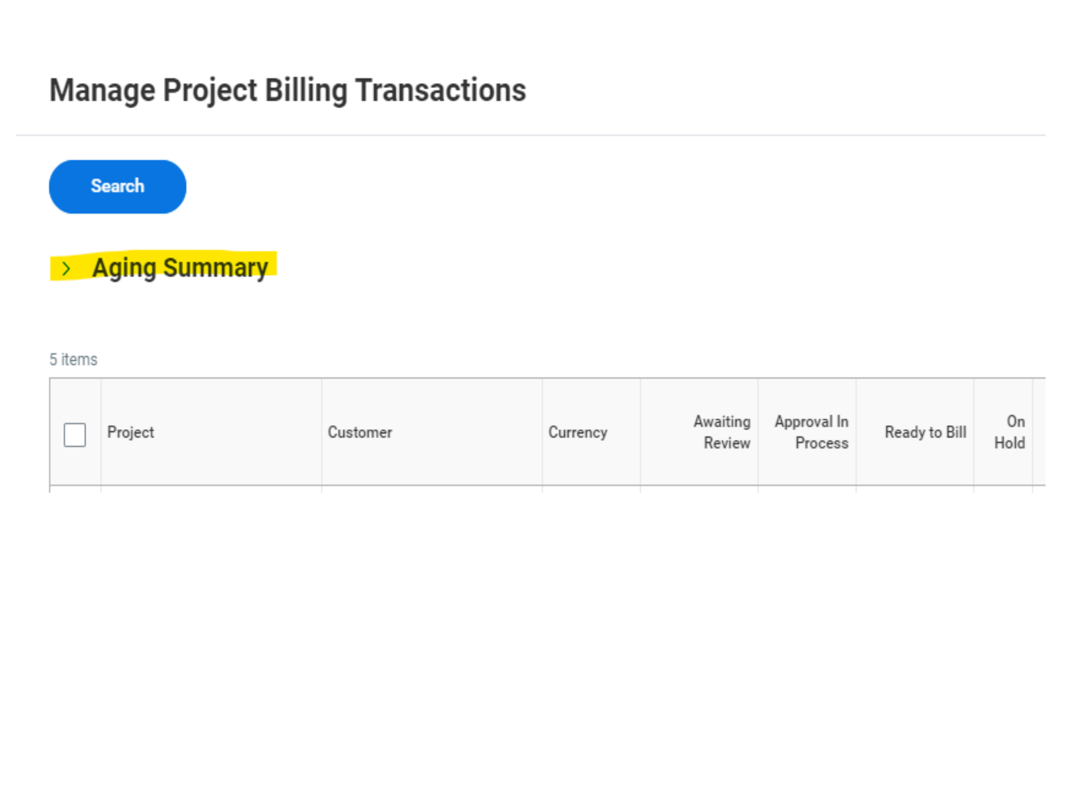
Community link https://doc.workday.com/release-notes/en-us/finrev/8031565.html

Workday release 2 automatically available features

Before release



After release



Customer contracts - Export project billing transactions to excel

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What's changing

With the 2024R2 release, you can now export project billing transactions from the Manage Project Billing Transactions task to Excel.

Additional considerations

Workday has added the Billable Transactions field on the Manage Project Billing Transactions task's transaction details view, which displays the total number of billable transactions across all transaction sources. You can click the field to open a read-only view of the grid, from where you can access exporting and other options.

Workday has also added an Export to Excel button on the read-only view.

Other actions available from the read-only view include export to PDF, filtering, and expanding and collapsing rows.

What do i need to do?

Workday recommends that you update your training materials so that users are aware of the changes.

What happens if i do nothing?

Users will be able to access the Billable Transactions field on the Manage Project Billing Transactions task's transaction details view and open a read-only grid view from where they can export transactions to Excel.

Community link https://doc.workday.com/release-notes/en-us/finrev/7862374.html

cognizant

Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
Export options were not available for project billing transactions.	Project Billing transactions can now be exported to Excel, PDF.	**Y/N:** No **Impact description:** N/A

Effort N/A

Defect link N/A

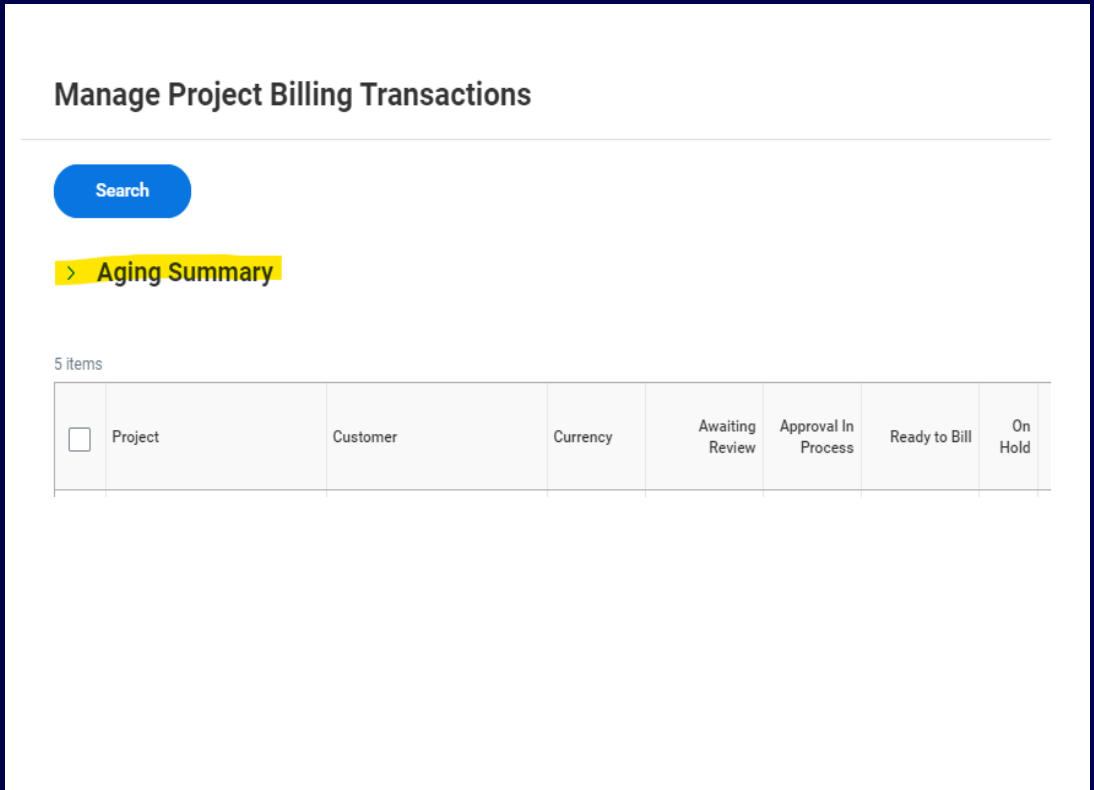
Community link https://doc.workday.com/release-notes/en-us/finrev/7862374.html

Workday release 2 automatically available features

Before release

N/A

After release



Customer contracts - Mass action for excluding transactions from prepayment

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What's changing

With the 2024R2 release, Workday has introduced a new mass action, Exclude from Prepayment, to enable you to exclude multiple transactions from prepayment.

Additional considerations

Workday had added the Exclude from Prepayment mass action to the Manage Project Billing Transactions and Edit Customer Invoice Proposal tasks.

The new mass action is available only if at least one eligible transaction is available to use for prepayment.

What do i need to do?

Workday recommends that you update your training materials so that users are aware of the changes.

What happens if i do nothing?

Users will be able to access the Exclude from Prepayment mass action from the Manage Project Billing Transactions and Edit Customer Invoice Proposal tasks.

Community link https://doc.workday.com/release-notes/en-us/finrev/8031568.html

Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
Export options were not available for project billing transactions.	Project Billing transactions can now be exported to Excel, PDF.	Y/N: No Impact description: N/A

Effort N/A

Defect link N/A

Community link https://doc.workday.com/release-notes/en-us/finrev/7862374.html

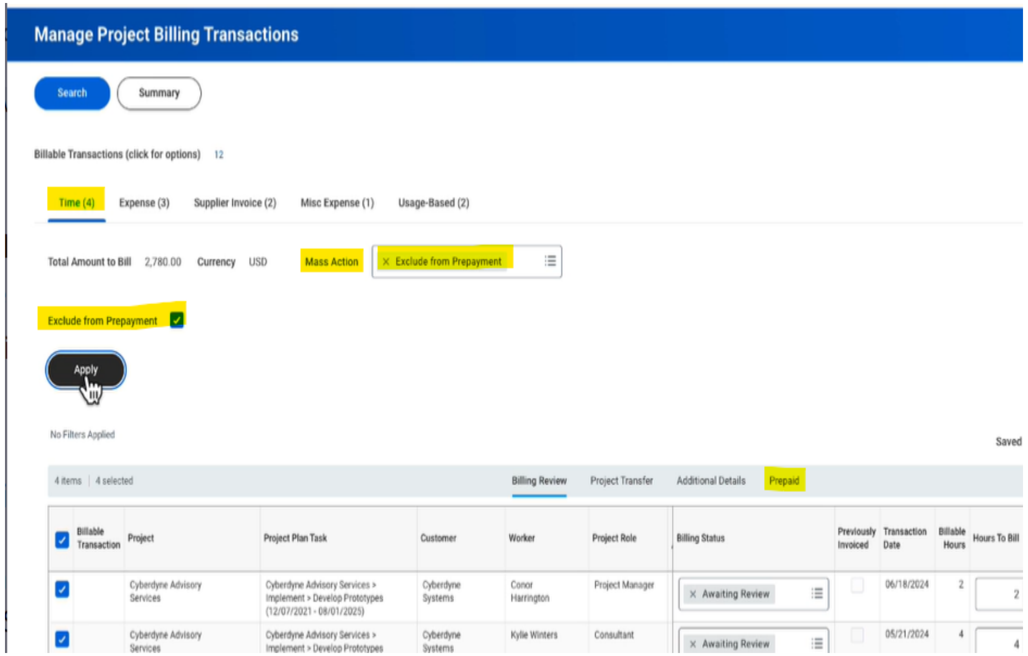
cognizant

Workday release 2 automatically available features

Before release

N/A

After release



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Customer Contracts - Mass modification of amounts for non-labor transaction sources

What's changing

With the 2024R2 release, Workday now extends the mass modification of amounts to bill capability, which already exists for time transactions, to these non-labor transaction sources:

- Supplier Invoice
- Expense
- Misc Expense

Note: Mass modification of amounts to bill for usage-based transactions is not supported at this time.

Additional considerations

Post this release, by default all 4 transactions sources (time, supplier invoice, expense and misc expense) are enabled for mass modify.

In order to disable mass modification for any one of the transaction sources, use Set Up Project Billing Configuration task.

In order to disable mass modification for all the transaction sources, use Configure Optional Fields task.

What do i need to do?

Ensure that in the Set Up Project Billing Configuration task, you select only the transaction types that you want to allow mass proration adjustments for in your organization. All four transaction types — Time, Expense, Supplier Invoice, and Misc Expense — are enabled by default. Deselecting a transaction type removes your ability to mass modify that transaction type, but you can still manually overwrite amounts to bill.

What happens if i do nothing?

By default, all four transaction types (Time, Expense, Supplier Invoice, and Misc Expense) will be selected in the Set Up Project Billing Configuration task and made available for adjustment in the Manage Project Billing Transactions task.

Community link https://doc.workday.com/release-notes/en-us/finrev/7694038.html

cognizant

Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
Capability to mass modify amounts was available only for Time transaction in the Manage Project Billing Transaction task.	Capability to mass modify amounts to bill in the Manage Project Billing Transaction task has been extended to: • Supplier Invoice • Expense • Misc Expense Further, new columns, Original Total Amount to Bill, Transaction Types for Adjustment, Eligible Amount for Adjustment, Adjustment % for Selected Types, Adjustment Amount for Selected Types, Zero Amount to Bill, have been added on task's summary page.	**Y/N:** Yes **Impact description:** This feature affects all users' ability to mass modify transaction types throughout all pages in the Manage Project Billing Transactions and Customer Invoice Proposal workflows.

Effort 0.5 Hours

Defect link N/A

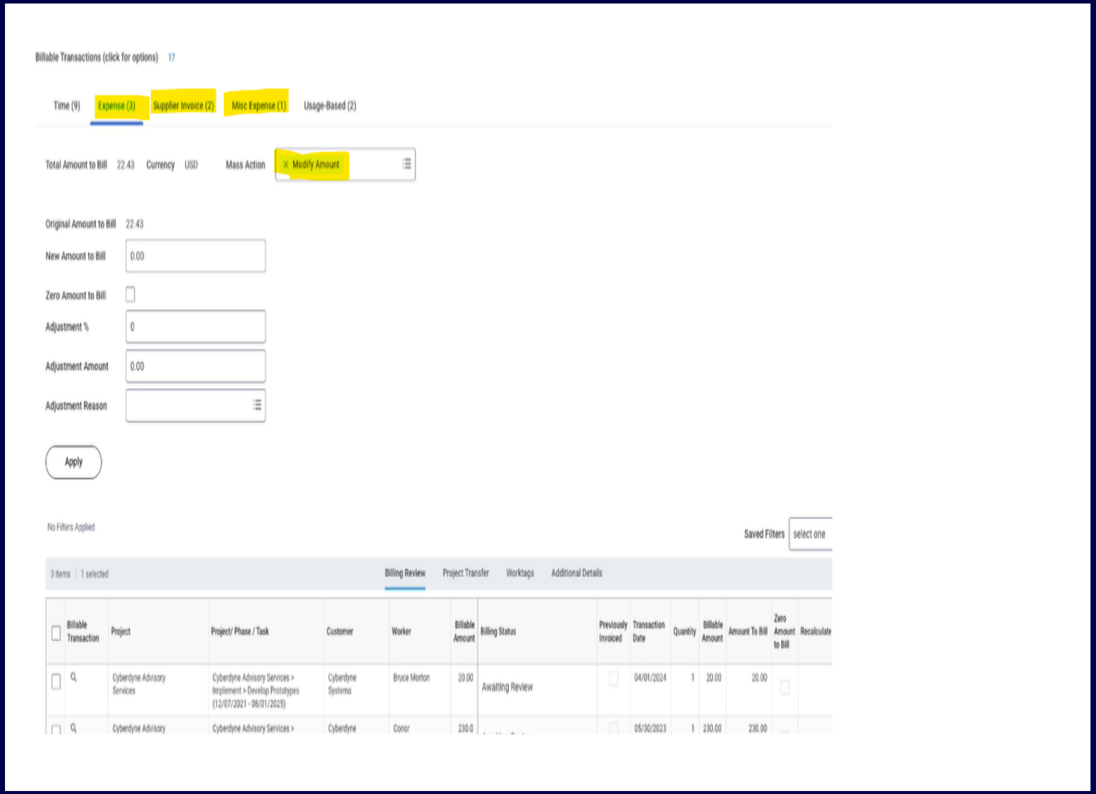
Community link https://doc.workday.com/release-notes/en-us/finrev/7694038.html

Workday release 2 automatically available features

Before release

N/A

After release



Customer Contracts - Prevention of concurrent transaction changes

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What's changing

With the 2024R2 release, Workday has enhanced the invoicing experience when concurrent changes are made to customer invoices; for example, if 2 users modify the same billable transaction at the same time.

Additional considerations

Workday now lock billable transactions for editing as soon as the invoicing process begins instead of after invoicing is completed, to prevent other users from altering the transactions during invoicing.

Workday now lock billing schedules for editing as soon as the invoicing process begins on installments belonging to the billing schedules, to prevent other users from altering the billing schedules during invoicing.

In the Manage Project Billing Transactions task:

During Submit or Create Invoice Proposal, if any of the selected transactions have been modified by another user then Workday will display a warning.

If any of the selected transactions on the Details or Summary pages, have a billing status of Billed or Billing in Progress, or have been submitted for invoicing, then Workday will display a warning and omit those transactions from the action.

What do i need to do?

Workday recommends that you update your training materials so that users are aware of the changes.

What happens if i do nothing?

When users try to make changes to transactions while the transactions are being invoiced, they'll receive a warning message.

Community link

https://doc.workday.com/release-notes/en-us/finrev/7694035.html

cognizant

Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
N/A	Concurrent changes by different users to same customer invoice will be prevented by Workday	Y/N: No Impact description: N/A

Effort N/A

Defect link N/A

Community link https://doc.workday.com/release-notes/en-us/finrev/7694035.html

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Customer contracts - Project phases & tasks for fixed fee and value-based customer contract line types

What's changing

With the 2024R2 release, you can add project phases and tasks on fixed fee project and value-based project customer contract lines,

This capability already exists for project time and expense contract lines and is now extended to fixed fee project and value-based project lines.

In this release, the phase and task granularity is only available when you configure Workday to use hours to calculate the revenue for the percentage of completion.

Additional considerations

You can't add fixed fee project or value-based project contract lines with phases or tasks to revenue recognition schedules that use the Percent Complete revenue recognition method when calculated by cost.

When project phases and tasks are added to contract lines, downstream budget processing works properly if the budget is at the project level, but not if it's at the phase/task level.

What do i need to do?

Enter project phases and tasks as needed to configure fixed fee project and value-based project customer contract lines.

What happens if i do nothing?

You can continue to enter billable projects to configure fixed fee project and value-based project customer contract lines.

Community link https://doc.workday.com/release-notes/en-us/finrev/7023798.html

cognizant

Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
Option to add project phase and task was enabled for Project Time and Expense line type in customer contracts	Option to add project phase and task has been extended to Fixed Fee Project and Value Based Project line type. In this release, phase and task will work only if revenue recognition is Hours for Percent Complete in the Revenue Recognition Schedule. There will be error if you select revenue recognition Percent Complete by Cost.	**Y/N:** Yes **Impact description:** You add project phases and tasks on fixed fee project and value-based project customer contract lines, enabling you to enter amounts at a more granular level, bill, and recognize revenue for multiple stages of a project, eliminating the need to create multiple projects

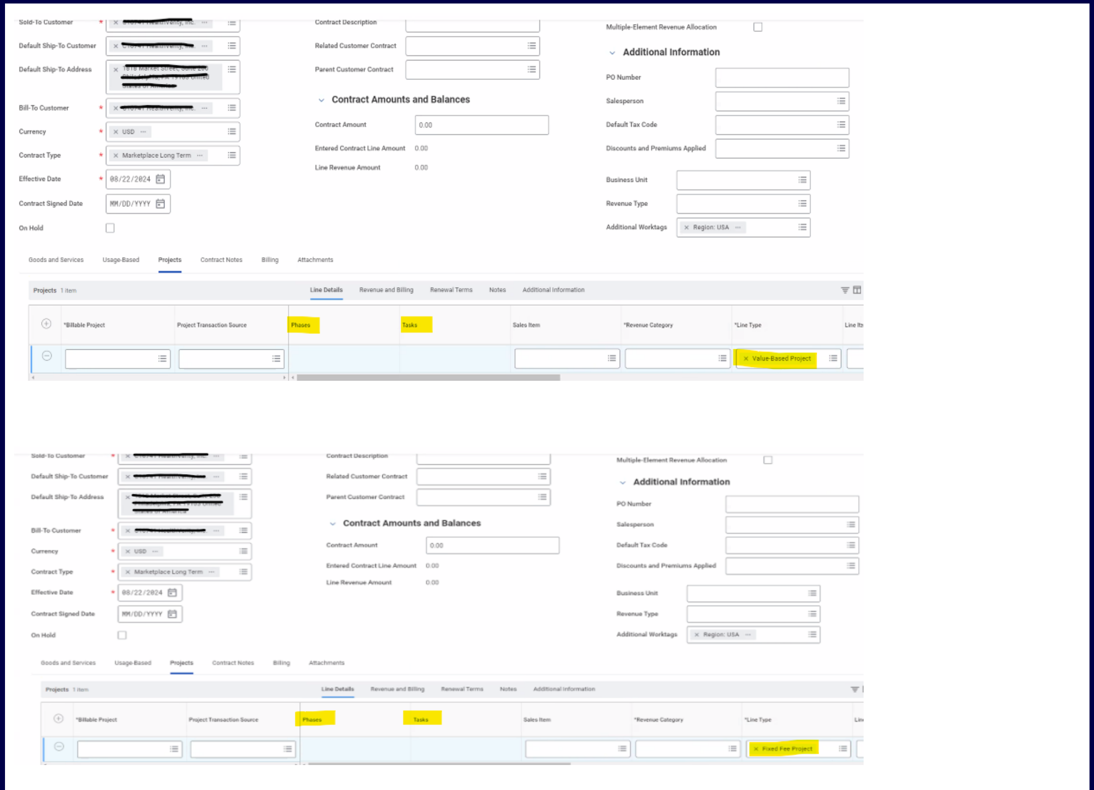
Effort 0.5 Hours

Defect link N/A

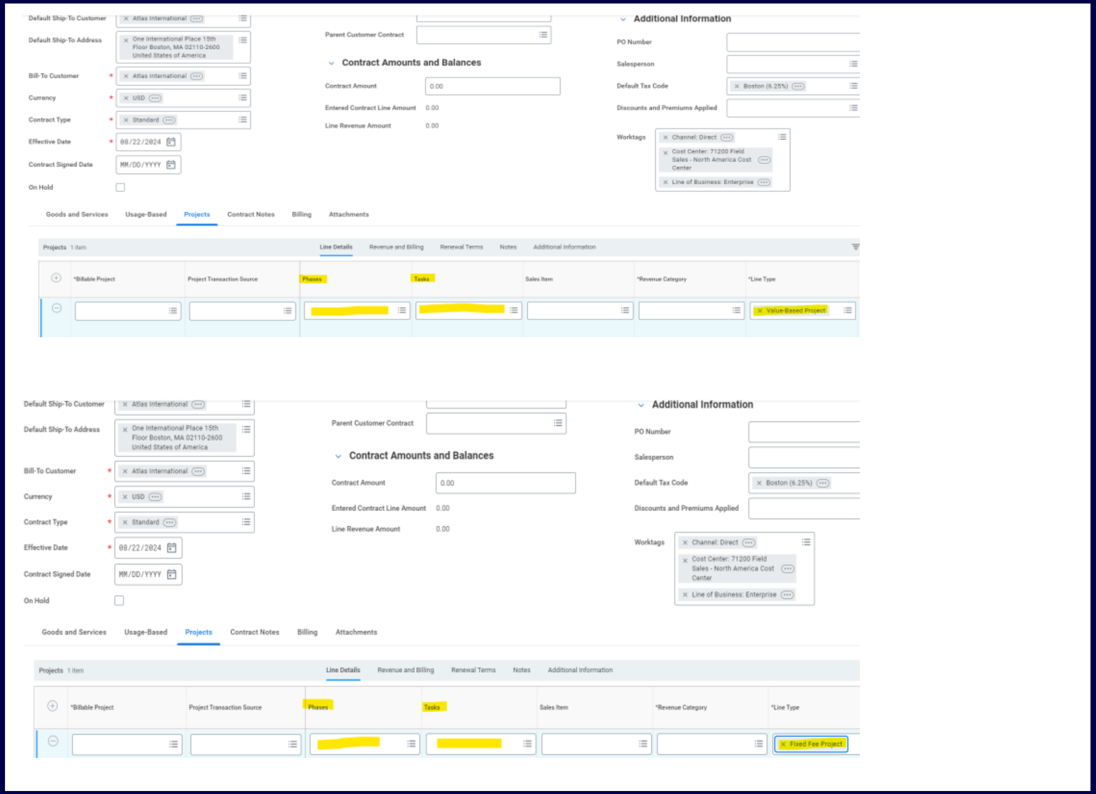
Community link https://doc.workday.com/release-notes/en-us/finrev/7023798.html

Workday release 2 automatically available features

Before release



After release



Customer contracts - Search enhancements in manage project billing transactions

What's changing

With the 2024R2 release, Workday has introduced new search capabilities in the Manage Project Billing Transactions task.

Additional considerations

At least one of these 4 fields (Project Hierarchy/Customer/Project Owner/Billable Projects) must be populated to perform a search in the Manage Project Billing Transactions task.

The Billable Projects prompt now excludes projects that don't have any transactions.

Any search filters you've previously saved are automatically converted to the new format

What do i need to do?

Workday recommends that you update your training materials so that users are aware of the changes.

What happens if i do nothing?

Users will experience the enhanced search capabilities in the Manage Project Billing Transactions task.

Community link https://doc.workday.com/release-notes/en-us/finrev/8031544.html

Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
N/A	The 3 fields Project Hierarchy, Customer, and Project Owner no longer populate projects in the Billable Projects field; they now filter the projects available to select in the Billable Projects field. For example, if you select customer Global Modern Services, then open the Billable Projects prompt and select Billable Projects by Project Customer, now only Global Modern Services projects are available to select.	Y/N: No Impact description: With improved search capabilities, you'll be able to review your billable project transactions more easily and intuitively.

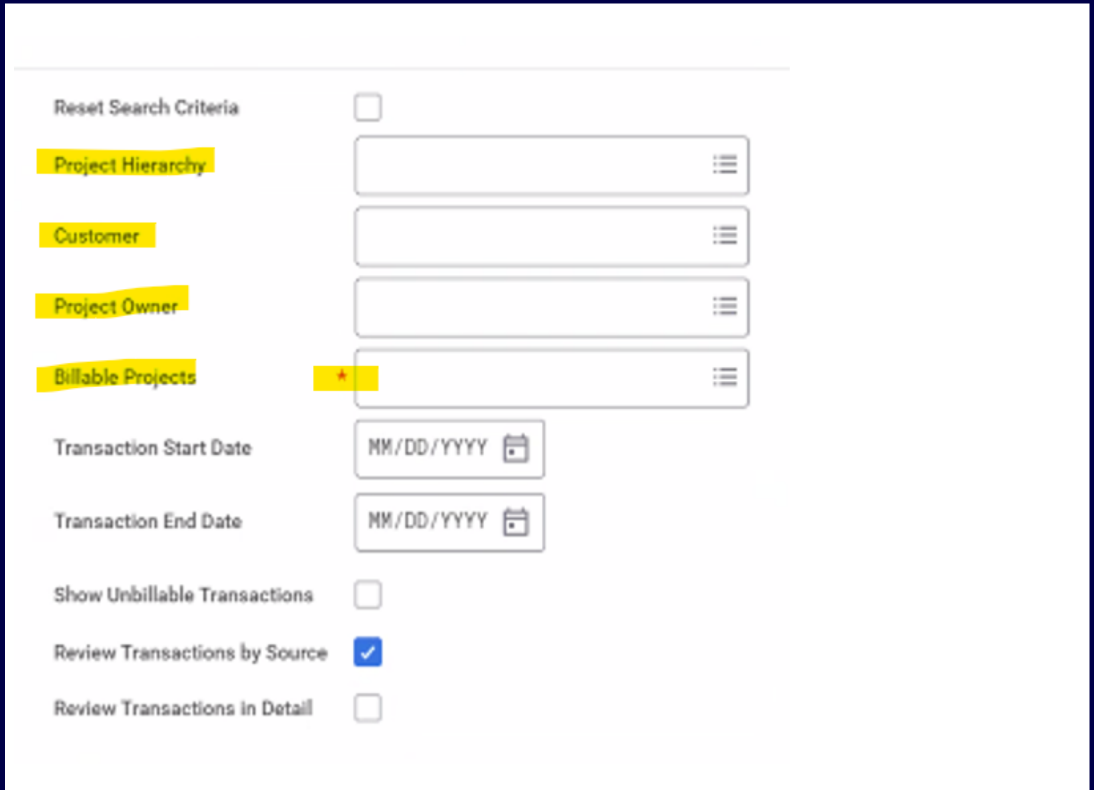
Effort N/A

Defect link N/A

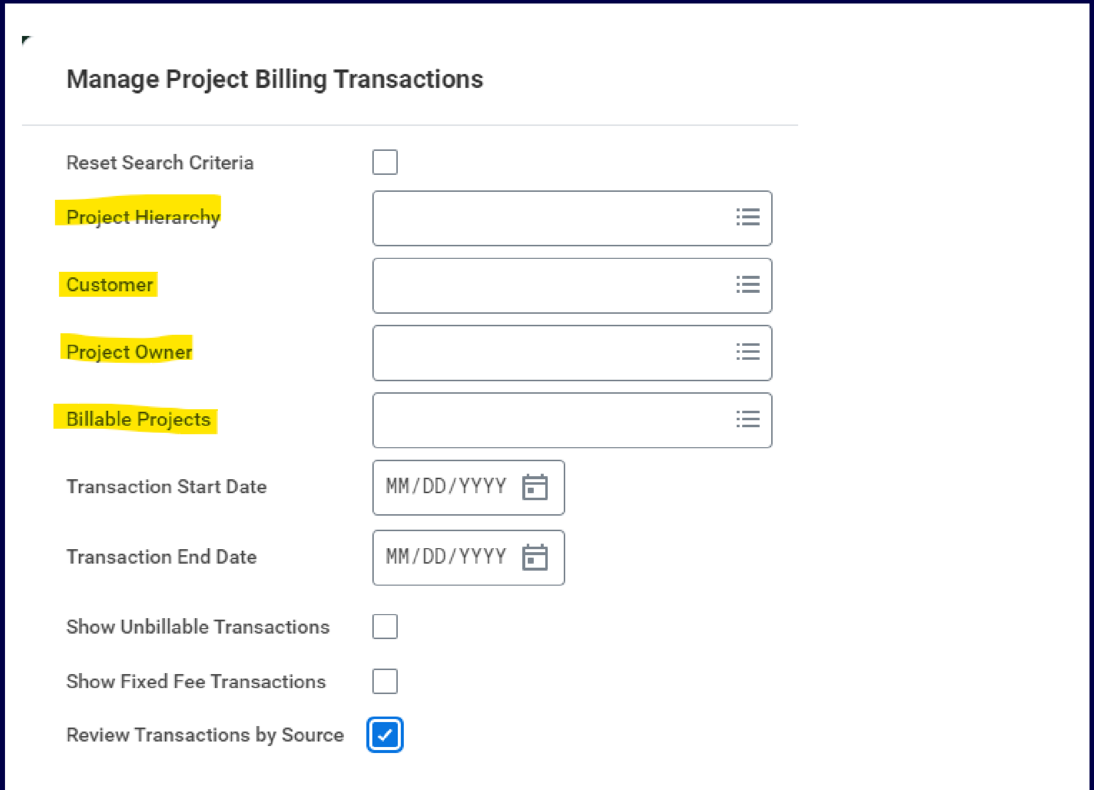
Community link https://doc.workday.com/release-notes/en-us/finrev/8031544.html

Workday release 2 automatically available features

Before release



After release



Customer contracts - Split project / phase / task column into phase and task columns

What's changing

With the 2024R2 release, Workday split the Project / Phase / Task column in the Manage Project Billing Transactions and Edit Customer Invoice Proposal tasks into separate Phase and Task columns. You can now filter for billing transactions by either project phase or project task.

Additional considerations

N/A

What do i need to do?

Workday recommends that you update your training materials so that users are aware of the changes.

What happens if i do nothing?

Users will see separate columns for phases and tasks in the Manage Project Billing Transactions and Edit Customer Invoice Proposal task.

Community link https://doc.workday.com/release-notes/en-us/finrev/8031544.html

Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
N/A	The 3 fields Project Hierarchy, Customer, and Project Owner no longer populate projects in the Billable Projects field; they now filter the projects available to select in the Billable Projects field. For example, if you select customer Global Modern Services, then open the Billable Projects prompt and select Billable Projects by Project Customer, now only Global Modern Services projects are available to select.	Y/N: Yes Impact description: You can now filter for billing transactions by either project phase or project task.

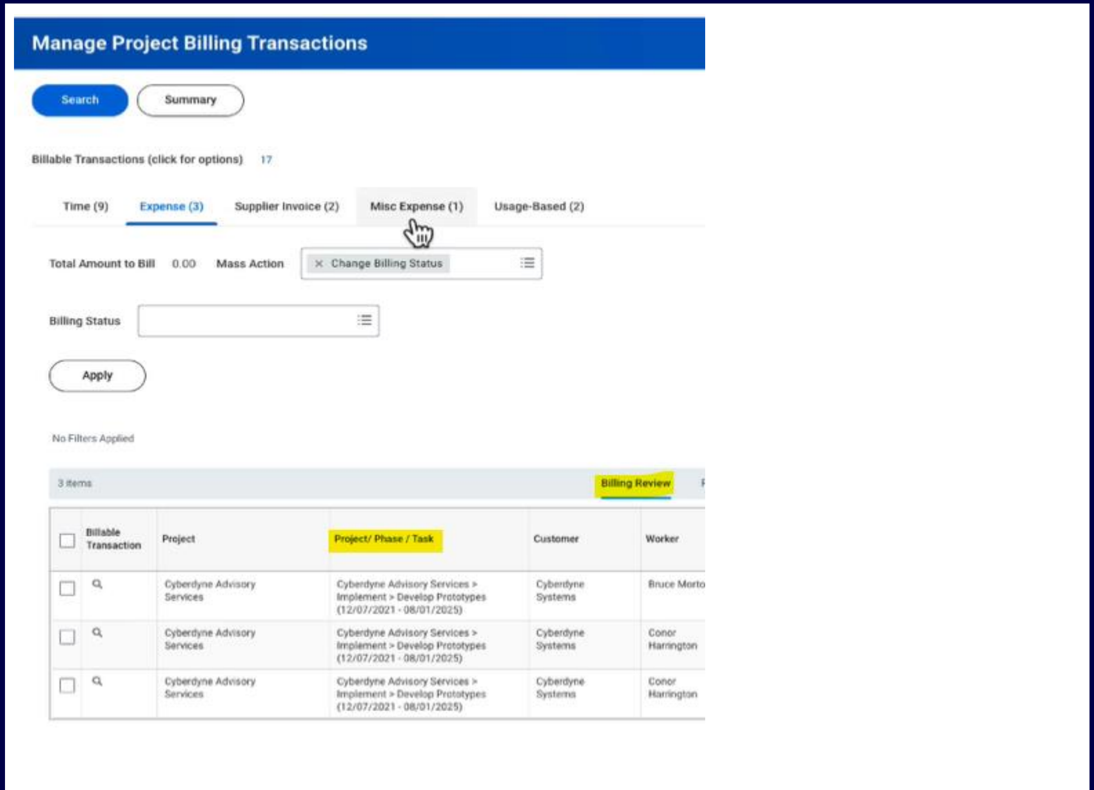
Effort 0.5 Hours

Defect link N/A

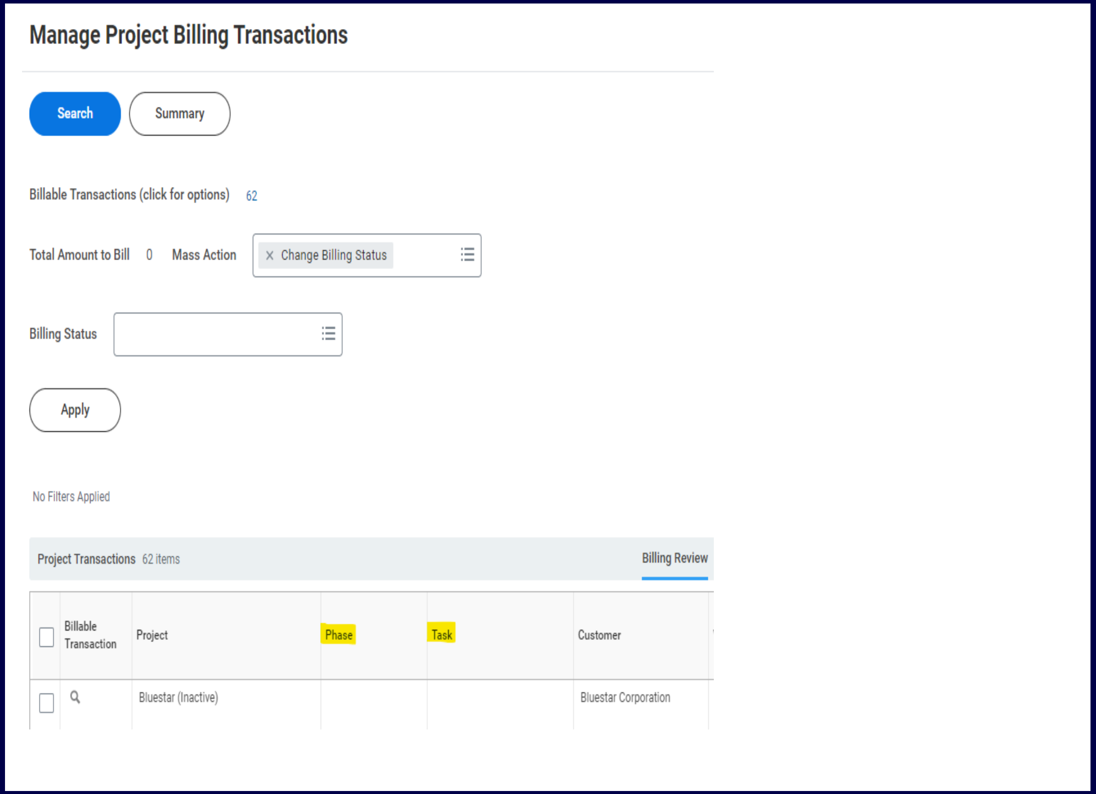
Community link https://doc.workday.com/release-notes/en-us/finrev/8031569.html

Workday release 2 automatically available features

Before release



After release



Setup required features

Customer contracts - Transfer project transactions

What's changing

With the 2024R2 release, Workday delivers a new Transfer Project Transactions task that enables you to transfer transactions from one project, phase, or task to another, and split transactions. You can access the task in 2 ways:

- Directly access the Transfer Project Transactions task.
- Access the Transfer Project Transactions task from the Manage Project Billing Transactions task's summary page

Note: Usage-based and capital project transactions can't be transferred, and there is no restriction on the types of project you can transfer to.

Additional considerations

Using this new task, these transaction types can be transferred to another project, phase, or task, or split:

- Project time and expense billable transactions (existing capability)
- Project time and expense unbillable transactions
- Fixed fee project transactions
- Value-based project transactions
- Nonbillable or internal project transactions

What do i need to do?

To enable the Transfer Project Transactions task, create a security policy for the domain Manage: Project Transaction Transfer:

- From the domain's related actions menu, select Domain > Create Security Policy.
- Review and update the security groups as necessary.
- Run the task Activate Pending Security Policy Changes.

What happens if i do nothing?

If you choose to do nothing, you won't be able to access the Transfer Project Transactions task to transfer transactions and won't see the Transfer Project option from the More button on the Manage Project Billing Transactions summary view.

Community link https://doc.workday.com/release-notes/en-us/finrev/7693774.html

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Customer contracts - Transfer project transactions (cont.)

Additional considerations

For Time transactions, you can transfer transactions only at the task level, and can't split them. For expense and supplier invoice transactions, you can transfer or split at the project, phase, or task level.

You can transfer transactions individually, by choosing a target project, phase, or task for individual transaction lines, or select multiple transaction lines and apply a mass action to transfer them all at once.

If the transfer moves transactions from a billable project to a nonbillable project or an unbillable transaction, the billable amount and amount to bill become zero, corresponding to the target project instead of the source project

Community link

https://doc.workday.com/release-notes/en-us/finrev/7693774.html

cognizant

Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
N/A	A new task Transfer Project Transactions has been created to transfer transactions from one project, phase, or task to another, and split transactions. The new task is accessible only if sub-domain Manage: Project Transaction Transfer is enabled	Y/N: Yes Impact description: This new task can help to move transactions from 1 project to another project, phase, or task, or to another task within the same project. For e.g., move transactions from non billable to billable project.

Effort 1 Hour

Defect link N/A

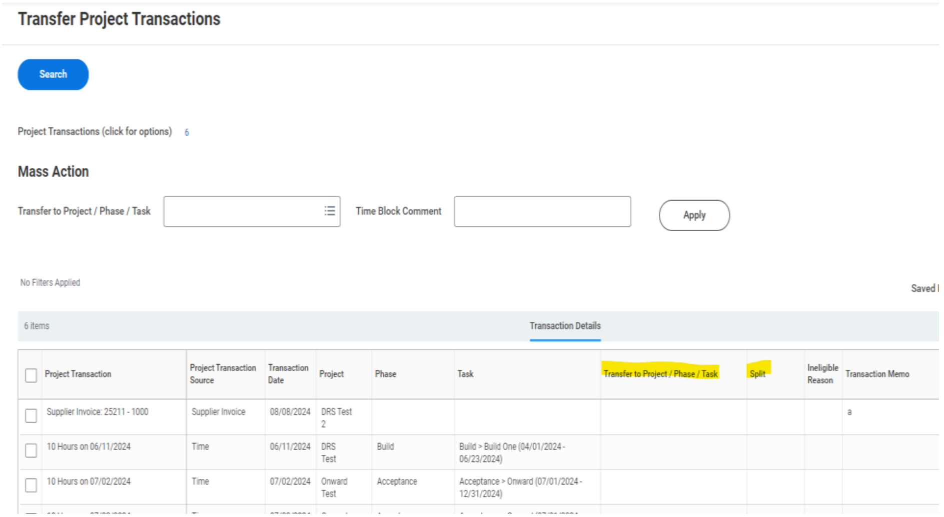
Community link https://doc.workday.com/release-notes/en-us/finrev/7693774.html

Workday release 2 setup based features

Before release

N/A

After release



Customer Contracts - Worklets on customer invoice proposal event & project transaction adjustment event BPs

What's changing

With the 2024R2 release, you can now add worklets to the Customer Invoice Proposal Event and Project Transaction Adjustment Event business processes (BPs).

Worklets enable you to add custom reports to an approval step in the business processes. For example, you could add a custom report that shows you information about previous invoices during the approval step of a new invoice proposal, to help you make your decision on approving or rejecting the invoice proposal.

Additional considerations

The worklets can only be embedded in an approval step, so you'll need to add an approval step to your BP if one doesn't already exist.

What do i need to do?

To enable worklets on the Customer Invoice Proposal Event and Project Transaction Adjustment Event business processes, you'll need to perform configuration steps:

- Enable a custom worklet for use in a business process.
- Enable users to view the related worklet.
- Add the worklet to the business process.

What happens if i do nothing?

Worklets won't be available from the Customer Invoice Proposal Event and Project Transaction Adjustment Event business processes.

Community link

https://doc.workday.com/release-notes/en-us/finrev/8031553.html

Workday 2024 release 2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
N/A	You can now add worklets to the Customer Invoice Proposal Event and Project Transaction Adjustment Event business processes (BPs).	Y/N: Yes Impact description: This feature will help in more informed decisions on approving or rejecting customer invoice proposals and project transaction adjustments.

Effort 1 Hour

Defect link N/A

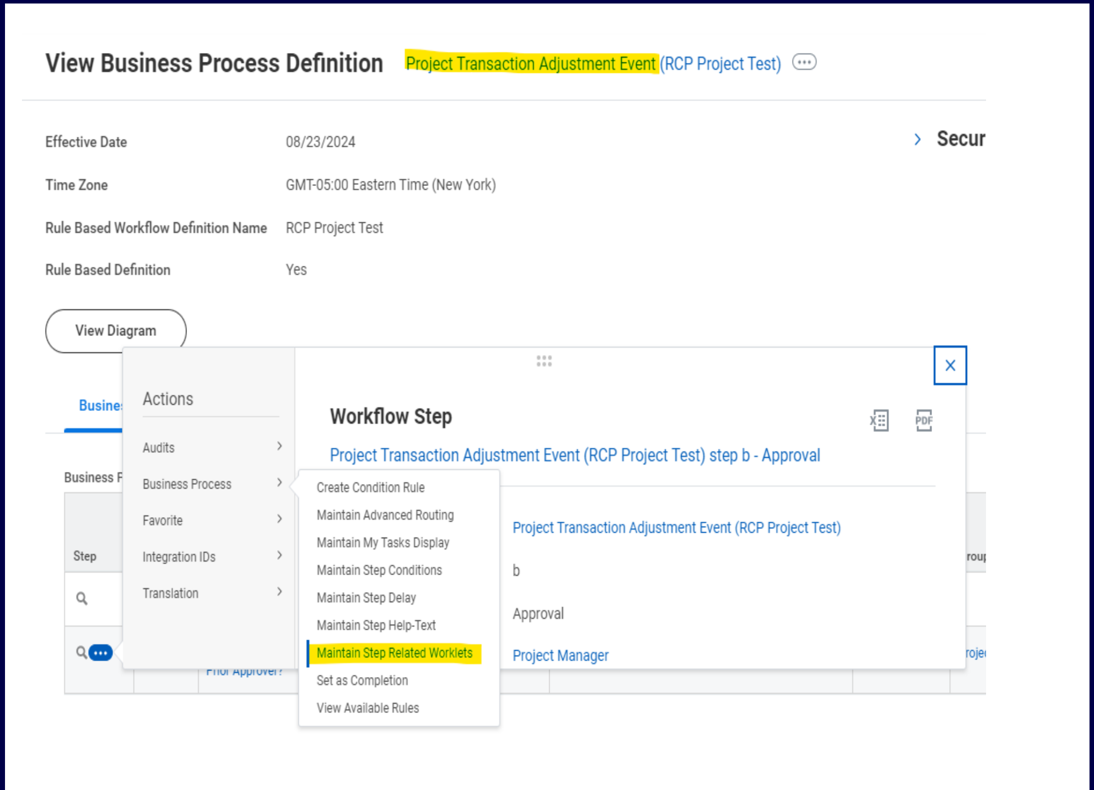
Community link https://doc.workday.com/release-notes/en-us/finrev/8031553.html

Workday release 2 setup based features

Before release

N/A

After release



Customer Contracts - Tabbed transaction grid on manage project billing transactions task

What's changing

With the 2024R2 release, Workday has enhanced the transaction grid on the Manage Project Billing Transactions task to provide the option to display all columns in a single view, allowing you to move or hide columns relevant to your billing.

Additional considerations

Workday has added a new Hide Separate Tabs in Transaction Grid option to the Set Up Project Billing Configuration task, on the Billing tab.

When the option is checked, the transaction grid is displayed as a single view including all columns and the Billable Transaction column includes the display IDs and remains fixed on the left side of the transaction grid when you scroll the grid horizontally.

What do i need to do?

On the Set Up Project Billing Configuration task, on the Billing tab, select or deselect the Hide Separate Tabs in Transaction Grid option.

What happens if i do nothing?

The transaction grid will continue to be displayed in the tabbed view.

Community link https://doc.workday.com/release-notes/en-us/finrev/8031561.html

Workday 2024 release 2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
You can view Transaction grid in the Manage Project Billing Transactions task in tabbed form only.	You can now choose to view Transaction grid in the Manage Project Billing Transactions task in tabbed form (the default), or with all columns in a single view.	**Y/N:** No **Impact description:** N/A

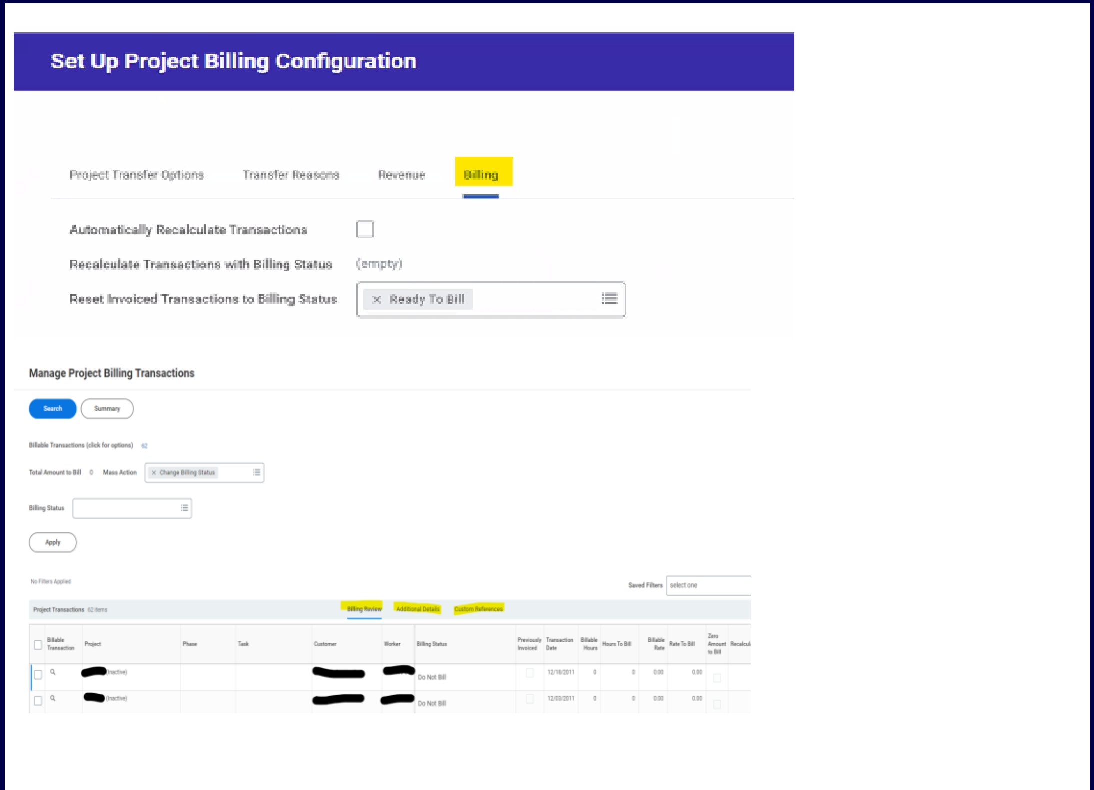
Effort 0.5 Hour

Defect link N/A

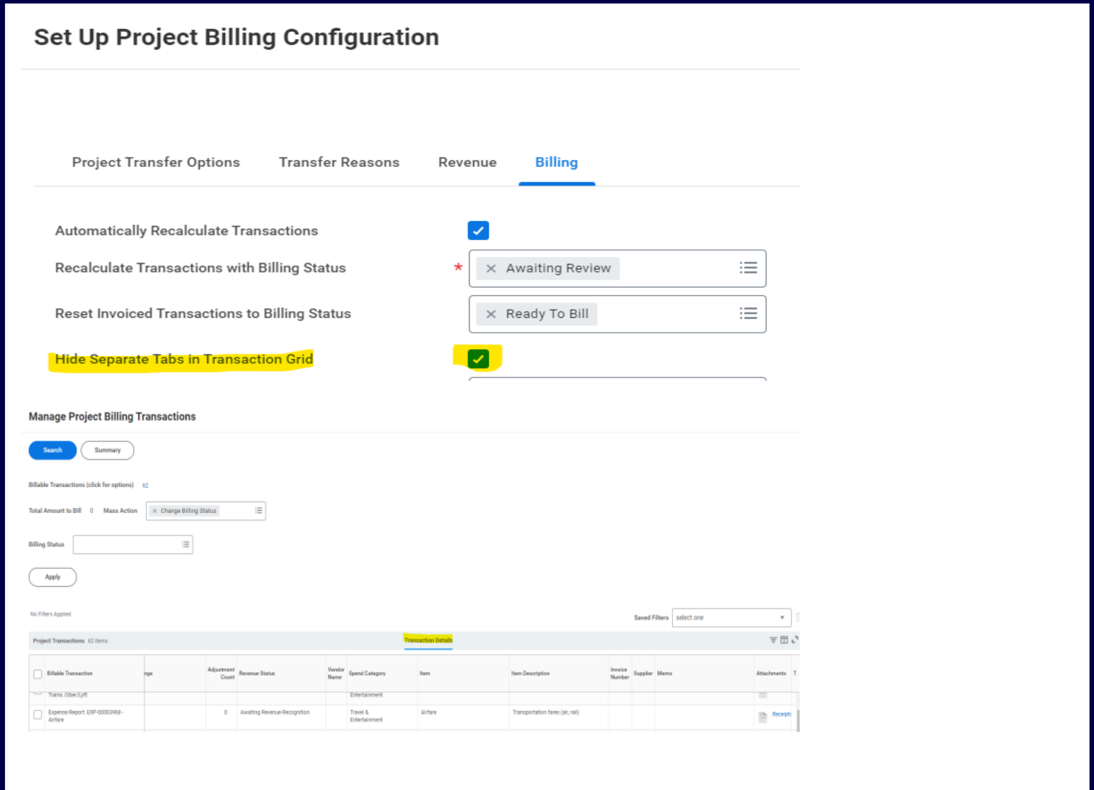
Community link https://doc.workday.com/release-notes/en-us/finrev/8031561.html

Workday release 2 setup based features

Before release



After release



Thank you