

Workday 2024 R2 Release Impact Analysis

Customer contracts

2024

Customer contracts



Automatically available features

Customer contracts - Custom validations on customer invoice proposals



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>

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.	<div>Y/N: Yes</div> <div>Impact description:</div> <div>Create own validations and guardrails for customer invoice proposals, ensuring that data is correct without having to wait until the invoicing stage.</div>

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

Set Up Project Billing Configuration

Project Transfer Options Transfer Reasons Revenue **Billing**

Automatically Recalculate Transactions ☐

Recalculate Transactions with Billing Status (empty)

Reset Invoiced Transactions to Billing Status × Ready To Bill

After release

Set Up Project Billing Configuration

Project Transfer Options Transfer Reasons Revenue **Billing**

Automatically Recalculate Transactions ☒

Recalculate Transactions with Billing Status * × Awaiting Review

Reset Invoiced Transactions to Billing Status × Ready To Bill

Hide Separate Tabs in Transaction Grid ☐

Transaction Types for Adjustment * × Expense
× Misc Expense
× Supplier Invoice
× Time

Enable Custom Validations for Customer Invoice Proposals ☒

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.	<div>Y/N: No</div> <div>Impact description:</div> <div>N/A</div>

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

Manage Project Billing Transactions

Search

Aging Summary

61+ DAYS
Transactions Awaiting Review

0
Transactions

Review Transaction Details

31-60 DAYS
Transactions Awaiting Review

0
Transactions

Review Transaction Details

0-30 DAYS
Transactions Awaiting Review

0
Transactions

Review Transaction Details

0 items

<input type="checkbox"/>	Project	Customer	Contract Line	Worker	Project Plan Phase	Project Plan Task	Project Role	Currency	Awaiting Review	Approval In Process	Ready to Bill	On Hold	Transactions Eligible for Adjustments	New Total Amount To Bill	Adjustment Reason	
No Data																

After release

Manage Project Billing Transactions

Search

Aging Summary

5 items

<input type="checkbox"/>	Project	Customer	Currency	Awaiting Review	Approval In Process	Ready to Bill	On Hold
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Customer contracts - Export project billing transactions to excel

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>

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.	<div>Y/N: No</div> <div>Impact description:</div> <div>N/A</div>

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

Manage Project Billing Transactions

Search

> Aging Summary

5 items

<input type="checkbox"/>	Project	Customer	Currency	Awaiting Review	Approval In Process	Ready to Bill	On Hold

Customer contracts - Mass action for excluding transactions from prepayment

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.	<div>Y/N: No</div> <div>Impact description:</div> <div>N/A</div>

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

Manage Project Billing Transactions

Search

Summary

Billable Transactions (click for options) 12

Time (4)

Expense (3)

Supplier Invoice (2)

Misc Expense (1)

Usage-Based (2)

Total Amount to Bill 2,780.00 Currency USD

Mass Action

Exclude from Prepayment

Exclude from Prepayment ☒

Apply

No Filters Applied

Saved

4 items | 4 selected

Billing ReviewProject TransferAdditional DetailsPrepaid

<input checked="" type="checkbox"/>	Billable Transaction	Project	Project Plan Task	Customer	Worker	Project Role	Billing Status	Previously Invoiced	Transaction Date	Billable Hours	Hours To Bill
<input checked="" type="checkbox"/>	Cyberdyne Advisory Services	Cyberdyne Advisory Services	Cyberdyne Advisory Services > Implement > Develop Prototypes (12/01/2021 - 08/01/2025)	Cyberdyne Systems	Conor Harrington	Project Manager	<div>⌵ Awaiting Review ⌵</div>	<input type="checkbox"/>	06/18/2024	2	<div>2</div>
<input checked="" type="checkbox"/>	Cyberdyne Advisory Services	Cyberdyne Advisory Services	Cyberdyne Advisory Services > Implement > Develop Prototypes	Cyberdyne Systems	Kyle Winters	Consultant	<div>⌵ Awaiting Review ⌵</div>	<input type="checkbox"/>	05/21/2024	4	<div>4</div>

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>

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.	<p>Capability to mass modify amounts to bill in the Manage Project Billing Transaction task has been extended to:</p> <ul style="list-style-type: none">• Supplier Invoice• Expense• Misc Expense <p>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.</p>	<div>Y/N: Yes</div> <div>Impact description:</div> <p>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.</p>

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

Billable Transactions (click for options) 17

Time (9) Expense (7) Supplier Invoice (2) Misc Expense (1) Usage-Based (2)

Total Amount to Bill 22.43 Currency USD Mass Action ✕ Modify Amount

Original Amount to Bill 22.43

New Amount to Bill

Zero Amount to Bill ☐

Adjustment %

Adjustment Amount

Adjustment Reason

Apply

No Filters Applied Saved Filters select one

3 items 1 selected Billing Review Project Transfer Worktags Additional Details

<input type="checkbox"/>	Billable Transaction	Project	Project / Phase / Task	Customer	Worker	Billable Amount	Billing Status	Previously Invoiced	Transaction Date	Quantity	Billable Amount	Amount To Bill	Zero Amount to Bill	Recalculate
<input type="checkbox"/>	Q	Cyberdyne Advisory Services	Cyberdyne Advisory Services > Implement > DevOps Prototypes (12/07/2021 - 06/01/2025)	Cyberdyne Systems	Bruce Morton	20.00	Awaiting Review	<input type="checkbox"/>	04/01/2024	1	20.00	20.00	<input type="checkbox"/>	
<input type="checkbox"/>	Q	Cyberdyne Advisory	Cyberdyne Advisory Services >	Cyberdyne	Conor	200.0		<input type="checkbox"/>	05/10/2023	1	200.00	200.00		

Customer Contracts - Prevention of concurrent transaction changes

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>

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	<div>Y/N: No</div> <div>Impact description:</div> <div>N/A</div>

Effort

N/A

Defect link

N/A

Community link

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

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>

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	<p>Option to add project phase and task has been extended to Fixed Fee Project and Value Based Project line type.</p> <p>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.</p>	<div>Y/N: Yes</div> <div>Impact description:</div> <p>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</p>

Effort

0.5 Hours

Defect link

N/A

Community link

<https://doc.workday.com/release-notes/en-us/finrev/7023798.html>

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.	<div>Y/N: No</div> <div>Impact description:</div> <div>With improved search capabilities, you'll be able to review your billable project transactions more easily and intuitively.</div>

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

Reset Search Criteria

Project Hierarchy

Customer

Project Owner

Billable Projects

Transaction Start Date

Transaction End Date

Show Unbillable Transactions

Review Transactions by Source

Review Transactions in Detail

After release

Manage Project Billing Transactions

Reset Search Criteria

Project Hierarchy

Customer

Project Owner

Billable Projects

Transaction Start Date

Transaction End Date


Show Unbillable Transactions

Show Fixed Fee Transactions

Review Transactions by Source

26

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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.	<div>Y/N: Yes</div> <div>Impact description:</div> <div>You can now filter for billing transactions by either project phase or project task.</div>

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

Manage Project Billing Transactions

Search

Summary

Billable Transactions (click for options) 17

Time (9)

Expense (3)

Supplier Invoice (2)

Misc Expense (1)

Usage-Based (2)

Total Amount to Bill 0.00 Mass Action

Change Billing Status

Billing Status

Apply

No Filters Applied

3 items

Billing Review

<input type="checkbox"/>	Billable Transaction	Project	Project / Phase / Task	Customer	Worker
<input type="checkbox"/>		Cyberdyne Advisory Services	Cyberdyne Advisory Services > Implement > Develop Prototypes (12/07/2021 - 08/01/2025)	Cyberdyne Systems	Bruce Mento
<input type="checkbox"/>		Cyberdyne Advisory Services	Cyberdyne Advisory Services > Implement > Develop Prototypes (12/07/2021 - 08/01/2025)	Cyberdyne Systems	Conor Harrington
<input type="checkbox"/>		Cyberdyne Advisory Services	Cyberdyne Advisory Services > Implement > Develop Prototypes (12/07/2021 - 08/01/2025)	Cyberdyne Systems	Conor Harrington

After release

Manage Project Billing Transactions

Search

Summary

Billable Transactions (click for options) 62

Total Amount to Bill 0 Mass Action

Change Billing Status

Billing Status

Apply

No Filters Applied

Project Transactions 62 items

Billing Review

<input type="checkbox"/>	Billable Transaction	Project	Phase	Task	Customer
<input type="checkbox"/>		Bluestar (Inactive)			Bluestar Corporation



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>

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>

Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
N/A	<p>A new task Transfer Project Transactions has been created to transfer transactions from one project, phase, or task to another, and split transactions.</p> <p>The new task is accessible only if sub-domain Manage: Project Transaction Transfer is enabled</p>	<div>Y/N: Yes</div> <div>Impact description:</div> <p>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.</p>

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

Transfer Project Transactions

Search

Project Transactions (click for options) 6

Mass Action

Transfer to Project / Phase / Task

Time Block Comment

Apply

No Filters Applied

Saved

6 Items

Transaction Details

<input type="checkbox"/> Project Transaction	Project Transaction Source	Transaction Date	Project	Phase	Task	Transfer to Project / Phase / Task	Split	Ineligible Reason	Transaction Memo
<input type="checkbox"/> Supplier Invoice: 25211 - 1000	Supplier Invoice	08/08/2024	DRS Test 2						a
<input type="checkbox"/> 10 Hours on 06/11/2024	Time	06/11/2024	DRS Test	Build	Build > Build One (04/01/2024 - 06/23/2024)				
<input type="checkbox"/> 10 Hours on 07/02/2024	Time	07/02/2024	Onward Test	Acceptance	Acceptance > Onward (07/01/2024 - 12/31/2024)				

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).	<div>Y/N: Yes</div> <div>Impact description:</div> <p>This feature will help in more informed decisions on approving or rejecting customer invoice proposals and project transaction adjustments.</p>

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

View Business Process Definition

Project Transaction Adjustment Event (RCP Project Test) ⋮

Effective Date

08/23/2024

> Secur

Time Zone

GMT-05:00 Eastern Time (New York)

Rule Based Workflow Definition Name

RCP Project Test

Rule Based Definition

Yes

View Diagram

Business

Business F

Step

Q

Q ⋮

Actions

Audits

Business Process

Favorite

Integration IDs

Translation

Workflow Step

Project Transaction Adjustment Event (RCP Project Test) step b - Approval

Create Condition Rule

Maintain Advanced Routing

Maintain My Tasks Display

Maintain Step Conditions

Maintain Step Delay

Maintain Step Help-Text

Maintain Step Related Worklets

Set as Completion

View Available Rules

Project Transaction Adjustment Event (RCP Project Test)

b

Approval

Project Manager

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.	<div>Y/N: No</div> <div>Impact description:</div> <div>N/A</div>

Effort

0.5 Hour

Defect link

N/A

Community link

<https://doc.workday.com/release-notes/en-us/finrev/8031561.html>

Before release

After release



Thank you