

Workday 2024 R2 Release Impact Analysis

<Procurement>

2024

Procurement



Automatically available features

Procurement - Checkout requisition performance improvements

What's changing

With the 2024R2 release, Workday improves the performance of requisition goods lines on Checkout Requisition. This increases the efficiency of your operations.

Additional considerations

Workday improves the performance of high-volume grids for requisition goods lines on the **Checkout Requisition** task by only processing spend transaction lines that have been changed.

What do i need to do?

N/A

What happens if i do nothing?

N/A

Community link

<https://doc.workday.com/release-notes/en-us/hrcomp/8133493.html>

Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
	Checkout Requisitions performance improved for high volume data.	<p>Y/N: No</p> <p>Impact description:</p> <p>Performance Improvement on Checkout Requisition task</p>

Effort N/A

Additional description if applicable

Defect link N/A

Community link <https://doc.workday.com/release-notes/en-us/hrcomp/8133493.html>

Procurement - Company currency fields for editing and reviewing procurement documents

What's changing

With the 2024R2 release, Workday now displays total amounts in the company's base currency on procurement documents for change orders, purchase orders, and requisitions. The total transaction amount in the company's base currency displays on these procurement documents while you edit and review them, including tasks in My Tasks.

Additional considerations

Workday has added 3 new fields to display total transaction amounts in the company's base currency. These new fields are only visible if the company's base currency is different from the transaction currency.

The new **Line Total Amount in Company Currency** field for purchase orders is available in the **Summary** section on:

- The **Copy Purchase Order** task.
- The **Create Purchase Order** task.
- The **Edit Purchase Order** task.
- Purchase orders for review in My Tasks.
- Purchase orders for revision in My Tasks.

The **Line Total Amount in Company Currency** field doesn't include any taxes, freight amounts, or other charges for the purchase order. This field will only display the **Line Total Amount** in the company's base currency.

What do i need to do?

No setup is required. Workday only displays the total transaction amount in the company's base currency when the transaction currency is different from the company's base currency.

If a customer doesn't want to see the field displaying the total amount in the company's base currency, you can hide the field. Access the **Configure Optional Fields** task to hide the:

- **Line Total Amount in Company Currency** field in the **Purchase Order Event** functional area, for purchase orders.
- **Change Order Total in Company Currency** field in the **Change Order** functional area, for change orders.
- **Total Amount in Company Currency** field in the **Requisition Event** functional area, for requisitions.

Community link

<https://doc.workday.com/release-notes/en-us/smreg/7459767.html>

Procurement - Company currency fields for editing and reviewing procurement documents (cont.)

Additional considerations (cont.)

The new **Change Order Total in Company Currency** field for change orders is available in the **Summary** section of:

- The **Create Purchase Order Change Order** task.
- The **Edit Purchase Order Change Order** task.
- Change orders for review in My Tasks.
- Change orders for revision in My Tasks.

The new **Total Amount in Company Currency** field for requisitions is available in the:

- **Requisition Information** section of the **Edit Requisition** task.
- **Requisition Information** section of the **Checkout page** for requisitions.
- Header of the Requisitions for review in My Tasks.
- Header of the Requisitions for revision in My Tasks.

We now also display these procurement transaction amounts in the company's base currency in the **All Items** view of My Tasks:

- Total purchase order amount, in the title of review and revision tasks for purchase orders.
- Total change order amount, in the title of review and revision tasks for change orders.
- Total requisition amount, in the title of review and revision tasks for requisitions.

What do i need to do?

- Use the new **Mass Change Worker on Procurement Document** task to access these tasks:
 - existing Mass Change Requisition Requester task.
 - new Mass Change Buyer on Purchase Order task.
- Update any internal documentation that references the existing **Mass Change Requisition Requester** task, as it is now under **Mass Change Worker on Procurement Document** task.
- Ensure to configure the appropriate security for the person using the new mass change action tasks.

Community link

<https://doc.workday.com/release-notes/en-us/smorder/7990230.html>

Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
<p>Amount in Company Currency is not an available fields for procurement document even the transaction has a currency other than the base currency.</p>	<p>If any of the procurement documents below has a currency other than the base/company currency, a field “amount in Company Currency” will automatically show to guide initiator, reviewers and approvers of the document.</p> <ul style="list-style-type: none"> • Purchase Order • Change Order • Requisition <p>There is an option to hide the field using the Configure Optional Fields task for each of the document if this is not needed.</p>	<p>Y/N: Yes</p> <p>Impact description:</p> <p>Update materials for create/view/review/approve procurement documents impacted with this change to inform that these documents will have the field for amount in company currency if the currency used in the transaction is not the same with company currency.</p> <p>If not needed, this field can be hidden via the Configure Optional Fields task.</p>

Effort 1 hour +*

Potentially need time to train reviewers on new field

Defect link N/A

Community link <https://doc.workday.com/release-notes/en-us/smreq/7459767.html>

Workday 2024R2 automatically available features

Before release

View Purchase Order

Purchase Order [PO-4451](#) Version 1 Status Approved

Change Order Reason

Reason [Supplier Change](#) Comments [test](#)

Summary

Company [Global Modern Services, Inc. \(USA\)](#)

Purchase Order Type (empty)

Supplier [Baker Mckenzie LLP](#)

Currency [GBP](#)

Document Date [08/22/2024](#)

Line Total Amount [10,000.00](#)

View Requisition [REQ-7266](#) ⋮

Company	Requester	Status	Total Amount
Global Modern Services, Inc. (USA)	Employee: Teresa Serrano	In Progress	100.00 AUD

Requisition Information

Request Date [08/22/2024](#)

Currency [AUD](#)

Requisition Type (empty)

High Priority No

After release

View Purchase Order

Purchase Order [PO-4451](#) Status Approved

Summary

Company [Global Modern Services, Inc. \(USA\)](#)

Purchase Order Type (empty)

Supplier [Baker Mckenzie LLP](#)

Currency [GBP](#)

Document Date [08/22/2024](#)

Line Total Amount [15,000.00](#)

Line Total Amount in Company Currency [19,106.24 USD](#)

View Purchase Order Change Order

Purchase Order [PO-4451](#) Version 1 Change Order Status Successfully C

Change Order Reason

Reason [Supplier Change](#)

Comments [test](#)

Summary

Company [Global Modern Services, Inc. \(USA\)](#)

Purchase Order Type (empty)

Supplier [Baker Mckenzie LLP](#)

Order-From Connection (empty)

Currency [GBP](#)

Document Date [08/22/2024](#)

Change Order Creation Date [08/22/2024](#)

Change Order Total [10,000.00](#)

Change Order Total in Company Currency [13,737.89 USD](#)

View Requisition [REQ-7266](#) ⋮

Company	Requester	Status	Total Amount
Global Modern Services, Inc. (USA)	Employee: Teresa Serrano	In Progress	100.00 AUD

Requisition Information

Request Date [08/22/2024](#)

Currency [AUD](#)

Total Amount in Company Currency [65.69 USD](#)

Procurement - Mass change buyer on purchase order

What's changing

With the 2024R2 release, Workday enables you to take mass change action on purchase order when you need to change a purchase order buyer, due to reorganization or attrition.

Additional considerations

Workday delivers a new **Mass Change Worker on Procurement Document** task (secured to the Mass Change Worker on Procurement Document Business Process Security Policy) that enables you to change the requesters and buyers on multiple documents at the same time for requisitions and purchase orders.

The **Procurement Document Type** field enables you to select:

- Requisition to access the existing **Mass Change Requisition Requester** task. The **Mass Change Requisition Requester** task used to be its own task. You are now only able to access the **Mass Change Requisition Requester** task through the new **Mass Change Worker on Procurement Document** task.
- Purchase Order to access the new **Mass Change Buyer on Purchase Order** task. You can now change buyers for multiple purchase orders at once.

What do i need to do?

- Use the new **Mass Change Worker on Procurement Document** task to access these tasks:
 - existing Mass Change Requisition Requester task.
 - new Mass Change Buyer on Purchase Order task.
- Update any internal documentation that references the existing **Mass Change Requisition Requester** task, as it is now under **Mass Change Worker on Procurement Document** task.
- Ensure to configure the appropriate security for the person using the new mass change action tasks.
- Review the Mass Change Requisition Requestor business process, now renamed the Mass Change Worker on Procurement Document business process, to ensure that it is set up with new condition rules in order to route the approvals to the correct user. You will need to do this even if you don't use the purchase order functionality in the new **Mass Change Worker on Procurement Document** task.

Community link

<https://doc.workday.com/release-notes/en-us/smorder/7990230.html>

Procurement - Mass change buyer on purchase order (cont.)

Additional considerations (Cont.)

Workday delivers a new **Mass Change Worker on Procurement Document** As you complete new **Mass Change Buyer on Purchase Order** task, consider:

- When you update the buyer on a purchase order, Workday also updates the buyer for associated change orders that are In Progress and in Draft status.
- You can change the purchase order buyer when a purchase order is in Draft, In Progress, Issued, or Approved status. You will not be able change the purchase orders buyers when the purchase order is Closed, Canceled, Denied, or Fully Paid.
- In the **Use New Buyer As** field, select Bill-to Contact and Bill-to Contact Detail options to populate these fields with the new buyer.
- Workday is only able to update purchase orders when the credit card assigned on the purchase order is compatible with the new buyer.
- If you run the **Manage Business Processes for Worker** task, do so after the **Mass Change Buyer on Purchase Order** task so that the new buyer is in the Purchase Order Buyer security group.
- If you did not perform the tasks in the recommended order, you can use the **Unassigned Tasks** report to assign any unassigned tasks to the new purchase order buyer.

What happens if i do nothing?

You cannot access the **Mass Change Requisition Requester** task directly and will now need to use the **Mass Change Worker on Procurement Document** task.

Community link

<https://doc.workday.com/release-notes/en-us/smorder/7990230.html>

Procurement - Mass change buyer on purchase order (cont.)

Additional considerations (Cont.)

Workday delivers a new **Mass Change Worker on Procurement Document** business object (secured to the Public Reporting Items domain).

Workday delivers these new report fields on the **Mass Change Worker on Procurement Document** business object (secured to the Public Reporting Items domain) that you can use in your custom reports:

- Business Document Type
- From Buyer
- Number of Purchase Orders Changed
- Purchase Orders Changed
- To Buyer
- Use New Buyer As

Workday delivers a new **Mass Change Worker on Procurement Document** report data source (secured to the Process: Requisition - Mass Action domain and Process: Purchase Order - Mass Action domain) with a Mass Change Buyer on Purchase Order Filter by Company (RDS) filter that you can use to create custom reports for tracking purchase order buyer and requisition requester changes.

We deliver a new **Find Mass Change Purchase Order Buyer Requests** report (secured to the Process: Purchase Order - Mass Action domain), enabling you to display all purchase order buyer changes for a company.

Community link

<https://doc.workday.com/release-notes/en-us/smorder/7990230.html>

Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
<p>Able to run the task Mass Change Requisition Requester to change the requisition's requester. The business process name for this is Mass Change Requisition Requester (Default Definition)</p>	<p>A new task has been introduced called Mass Change Worker on Procurement Document where you can select either requisition or purchase order. Selecting requisition will direct you to the task Mass Change Requisition Requester, which is now not accessible directly. Same functionality has been retained for this task. Selecting purchase order will direct you to the new task Mass Change Buyer on Purchase Order, which will allow you to change PO buyer all at once.</p> <p>The business process Mass Change Requisition Requester has been changed to Mass Change Worker on Procurement Document.</p>	<p>Y/N: Yes</p> <p>Impact description:</p> <p>Existing Mass Change Requisition Requester task is now NOT accessible directly. It can be accessed via the new task Mass Change Worker on Procurement Document together with Purchase Order buyer change which is a new functionality. You need to update materials that involves these processes.</p> <p>Also note that the existing BP: Mass Change Requisition Requester has been changed to Mass Change Worker on Procurement Document.</p>

Effort 3 hours

Need to train end users on new process

Defect link N/A

Community link <https://doc.workday.com/release-notes/en-us/smorder/7990230.html>

Workday 2024R2 automatically available features

Before release

The dialog box is titled "Mass Change Requisition Requester" and contains the following fields:

- Request Name *
- Company *
- From Requester *
- Document Date On or After: 23/07/2024
- Document Date On or Before: 22/08/2024

Buttons: Cancel, OK

[View Business Process Definition](#) [Mass Change Requisition Requester \(Default Definition\)](#)

After release

The dialog box is titled "Mass Change Worker on Procurement Document" and contains the following fields:

- Procurement Document Type *
 - Search
 - Purchase Order
 - Requisition

The dialog box is titled "Mass Change Requisition Requester" and contains the following fields:

- Request Name *
- Company *
- From Requester *
- Document Date On or After: 23/07/2024
- Document Date On or Before: 22/08/2024

Buttons: Cancel, OK

The dialog box is titled "Mass Change Buyer on Purchase Order" and contains the following fields:

- Request Name *
- Company *
- Current Buyer *
- Document Date On or After: DD/MM/YYYY
- Document Date On or Before: DD/MM/YYYY

Buttons: Cancel, OK

[View Business Process Definition](#) [Mass Change Worker on Procurement Document \(Default Definition\)](#)

Procurement - Procurement tasks performance improvements

What's changing

With 2024R2, Workday improves the processing of procurements tasks when you edit and tab through the various fields on the page. This enables you to navigate through the fields quicker, increasing operations efficiency.

Additional considerations

Workday improves the processing for when you edit these fields and tab out:

- Any item on a goods line on the **Requisition Template**.
- **Requisition Type** in **Edit Requisition** or **Checkout Requisition** task.
- **Order Quantity** in the **Edit Inventory Par Count** task.

What do i need to do?

N/A

What happens if i do nothing?

N/A

Community link

<https://doc.workday.com/release-notes/en-us/smorder/8075880.html>

Workday 2024R2 automatically available features

Prior to 2024R2	Post 2024R2	Impact
	<p>An improved performance for the following procurement objects:</p> <ul style="list-style-type: none"> • Requisition Template • Requisition Type in Edit Requisition or Checkout Requisition task • Order Quantity in the Edit Inventory Par Count task 	<p>Y/N: No</p> <p>Impact description:</p> <p>Improved Performance</p>

Effort N/A

Additional description if applicable

Defect link N/A

Community link <https://doc.workday.com/release-notes/en-us/smorder/8075880.html>

Procurement - Setup: Item substitutes with different base unit of measure

What's changing

With 2024R2, Workday enables you to configure substitute items with a different base unit of measure than the primary purchase item. Workday provides more flexibility for substitute item packaging that may differ from primary item packaging and enable you to use more items as substitutes.

Additional considerations

Workday has updated these tasks to enable item substitutes with different base units of measure (UOM):

- Create Purchase Item
- Edit Purchase Item
- Mass Maintain Purchase Items

We update these web services to enable item substitutes with different base UOMs:

- Get Purchase Items
- Put Purchase Item

Workday has updated the auto-sourcing process for requisitions to support item substitutes with different base UOMs. When you have differences between the ordering UOM and the base UOM, Workday consistently recalculates ordering quantity based on the item's conversion factor to preserve the requested base quantity, minimizing over ordering or under ordering.

What do i need to do?

This feature is automatically available. You'll be able to define substitutes for purchase items when they don't have the same base unit of measure.

What Happens If I Do Nothing?

You'll be able to define substitutes with different base unit of measure.

Community link

<https://doc.workday.com/release-notes/en-us/sminv/7657616.html>

Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
<p>Primary and Substitute Items should have the same base UOM. Selecting substitute item with other base UOM will throw the error “You can't select an Item Substitute that doesn't share the same base unit of measure as the original item. Select an Item Substitute with a common unit of measure.”.</p>	<p>It is now allowed to select a substitute item with different base UOM from the primary purchase item. Workday will consistently recalculates ordering quantity based on the item’s conversion factor to preserve the requested base quantity in the case that there are difference between ordering and base UOM.</p>	<p>Y/N: Yes</p> <p>Impact description:</p> <p>Substitute Item with different base UOM with primary purchase item is now allowed. Update materials regarding this process.</p>

Effort N/A

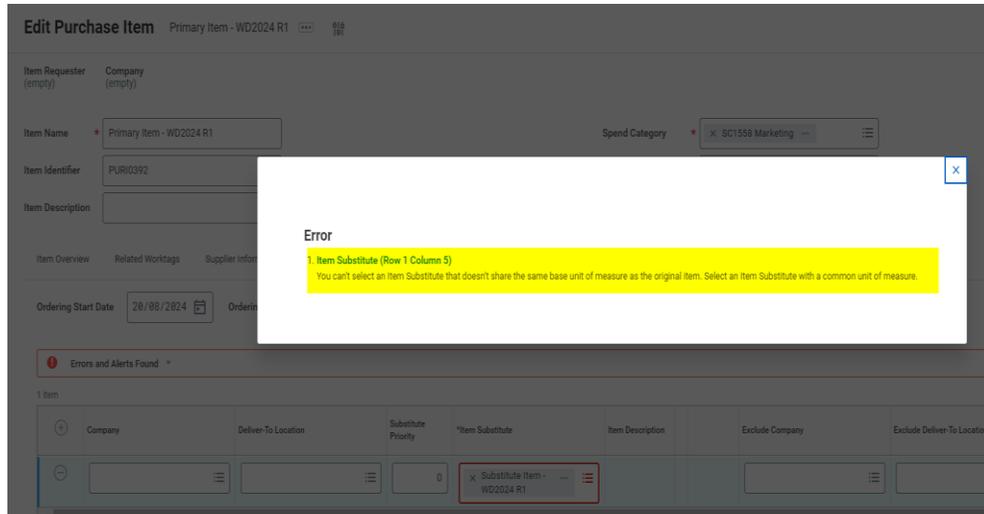
Additional description if applicable

Defect link N/A

Community link <https://doc.workday.com/release-notes/en-us/sminv/7657616.html>

Workday 2024R2 automatically available features

Before release



Edit Purchase Item Primary Item - WD2024 R1

Item Requester (empty) Company (empty)

Item Name * Primary Item - WD2024 R1 Spend Category * SC1558 Marketing

Item Identifier PUR00392

Item Description

Item Overview Related Worktags Supplier Information

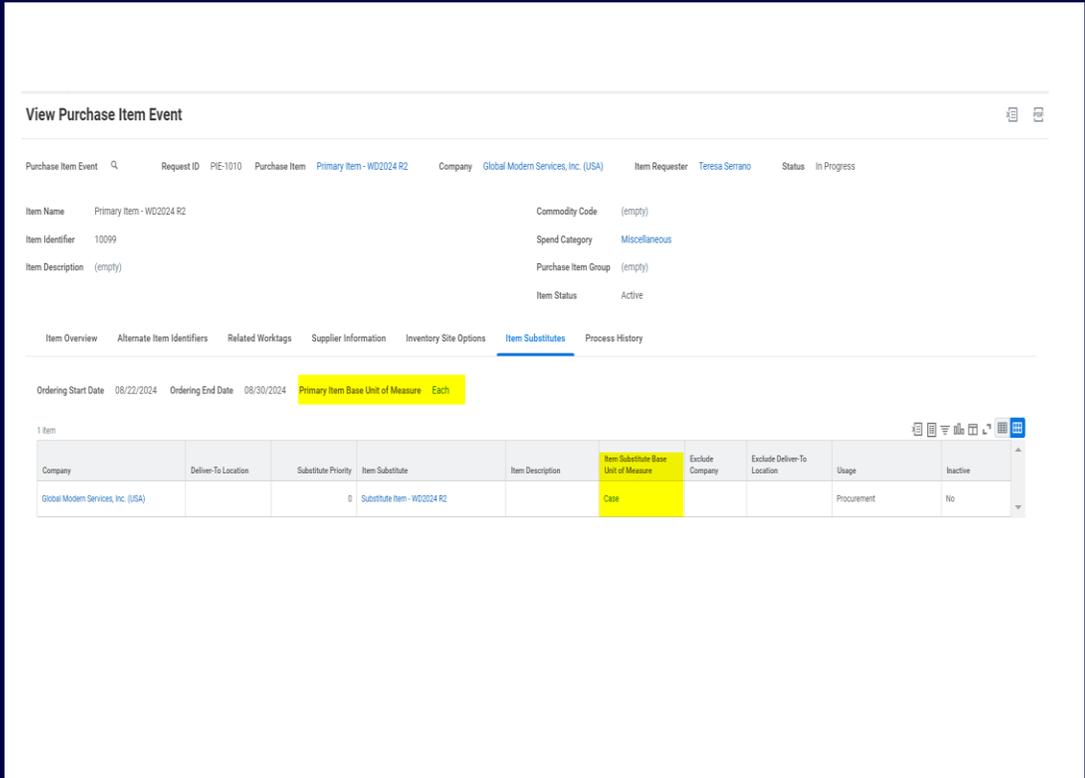
Ordering Start Date 28/08/2024

Errors and Alerts Found

1 Item

Company	Deliver-To Location	Substitute Priority	Item Substitute	Item Description	Exclude Company	Exclude Deliver-To Location
		0	Substitute Item - WD2024 R1			

After release



View Purchase Item Event

Purchase Item Event Request ID PIE-1010 Purchase Item Primary Item - WD2024 R2 Company Global Modern Services, Inc. (USA) Item Requester Teresa Serrano Status In Progress

Item Name Primary Item - WD2024 R2 Commodity Code (empty)

Item Identifier 10099 Spend Category Miscellaneous

Item Description (empty) Purchase Item Group (empty)

Item Status Active

Item Overview Alternate Item Identifiers Related Worktags Supplier Information Inventory Site Options **Item Substitutes** Process History

Ordering Start Date 08/22/2024 Ordering End Date 08/30/2024 Primary Item Base Unit of Measure Each

1 Item

Company	Deliver-To Location	Substitute Priority	Item Substitute	Item Description	Item Substitute Base Unit of Measure	Exclude Company	Exclude Deliver-To Location	Usage	Inactive
Global Modern Services, Inc. (USA)		0	Substitute Item - WD2024 R2		Case			Procurement	No

Procurement - Spend management tasks performance improvements

What's changing

With 2024R2, Workday improves the performance of certain spend management tasks in a public cloud environment. This reduces your time spent executing the listed spend management transactions in a public cloud environment.

Additional considerations

Workday improves the performance of these spend management tasks in a public cloud environment:

- Create Ad Hoc Par Count
- Requisition API – Requisition API Loop
- Requisition Event – Auto-Source Requisition
- Schedule Automatic Updates from Purchase Order Acknowledgements
- Schedule Issue Purchase Orders

What do i need to do?

N/A

What Happens If I Do Nothing?

N/A

Community link

<https://doc.workday.com/release-notes/en-us/smorder/8128077.html>

Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
N/A	Improve Performance on Spend Management task in a public cloud environment.	<p>Y/N: No</p> <p>Impact description:</p> <p>Performance Improvement</p>

Effort N/A

Additional description if applicable

Defect link N/A

Community link <https://doc.workday.com/release-notes/en-us/smorder/8128077.html>

Setup required features

Procurement - Requisition templates

What's changing

With the 2024R2 release, Workday improves the requisition template experience for all users. You can now select multiple companies, company hierarchies, and worktag types when creating templates.

Workday also delivers improved security for requisition templates. You can now configure domain security to access all shared and self-service templates.

A less restrictive experience for all users who create and use requisition templates.

Additional considerations

Workday delivers these new report fields (secured to the Public Reporting Items domain) on the Requisition Template business object:

- Company or Company Hierarchy
- Worktags

What do i need to do?

Security Changes

On the Maintain Feature Opt-Ins task, Opt-In to the Enable Requisition Template Security Updates feature.

Create the security policy for the new Process: Shared Requisition Templates - View domain.

What happens if i do nothing?

The new report fields on the Requisition Templates business object are automatically available for all users.

If you don't enable the new security updates:

Requisition template security will continue to be managed by Template Access for shared templates

Self-Service templates will be continued to be managed by the owner.

Community link

<https://doc.workday.com/release-notes/en-us/smreg/8093778.html>

Procurement - Requisition templates (cont.)

Additional considerations (cont.)

Workday also delivers a new Process: Shared Requisition Template - View security domain, with the same security permissions as the existing Process: Shared Requisition Templates security domain, that you can use to configure view access to all unshared and self-service Requisition Templates.

Workday moves the View Items button on the Add From Templates and Requisitions task for an improved user experience.

Workday delivers these updates on the Put Requisition Template Web Service:

- Updated Company Reference field now supports multiple company instances, and company hierarchies.
- Updated Requisition Template Reference field now supports the domain security model.
- New Worktag References field to support multiple instances of worktags.

Workday delivers these updates on the Get Requisition Templates Web Service:

- Updated Company Reference field now supports multiple company instances, and company hierarchies.
- New Worktag References field to support multiple instances of worktags.

Workday updates the Requisition Templates REST API in the new Procurement v5 REST Web Service:

- Workday replaces the existing company field with a new companies field that can return multiples.
- Workday delivers a new worktags field that returns templates worktags.

Community link

<https://doc.workday.com/release-notes/en-us/smreg/8093778.html>

Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
<p>Requisition template creation can only input company as a single instance.</p>	<p>When creating requisition template, user can now:</p> <ul style="list-style-type: none"> • Input multiple company values on the company field. • Input company hierarchy on the company field. Multiple company hierarchy values is allowed as well. • Input worktags values. <p>Web services related to requisition template were also updated to cater multiple companies, company hierarchies and worktags.</p> <p>Security for requisition templates can be opt-in to allow unshared and self-service templates to be shared.</p>	<p>Y/N: Yes</p> <p>Impact description:</p> <p>Update materials regarding creation of requisition templates that it now caters multiple companies, company hierarchies and worktags. Please ensure to update the related web services as well.</p> <p>The Requisition Template security update is opt-in.</p>

Effort 3 hours*

If requisition templates are in scope

Defect link N/A

Community link <https://doc.workday.com/release-notes/en-us/smreq/8093778.html>

Workday release 2 setup based features

Before release

Create Requisition Template

Template Details

Company *

Requisition Template Name *

Worker (empty)

Created On 23/08/2024

Requisition Currency *

After release

Create Requisition Template

Template Details

Requisition Template Name *

Company *

Worktags

Worker [Teresa Serrano](#)

Created On 08/23/2024

Requisition Currency *

Procurement - Third party integration for recall management

What's changing

With the 2024R2 release, Workday provides the ability to automatically create recall alerts in Workday through third party integration systems.

Workday enables greater automation of the recall processes and eliminate the need to manually find new recall notifications from multiple sources to determine if they're relevant.

Additional considerations

Workday delivers a new ECRI Inbound Package Solution that you can use to apply a new INT Studio ECRI Inbound option to your third party integration system.

Workday delivers a new Recall Workbench task (secured to the Process: Recall domain) that you can use to review and take action on recall alerts created both in Workday and your third party integration.

Workday delivers a new Review Recall Line Details task (secured to the Process: Recall domain) that you can use to take action on specific recall lines and the items associated with them.

Workday delivers a new External Sourceable ID field on the Find Recall report, enabling you to search for recalls based on external IDs from the:

FDA, Manufacturer, and Third Party Integration

Deployment considerations

You must create and modify your own cloud archive file (CLAR) for the package solution and secure the instance of the integration.

What do i need to do?

To configure the ECRI integration, you must acquire and deploy the ECRI Inbound Packaged Solution. Workday included the steps to configure the integration in the packaged solution.

To utilize the Recall Workbench, configure the Process: Recall domain to include the security groups that need to access it.

What happens if i do nothing?

This feature is entirely opt-in. If you don't acquire and deploy the packaged solution, you can continue to process recalls the same way. Users with access to the Process: Recall domain gain access to the new Recall Workbench task.

Community link

<https://doc.workday.com/release-notes/en-us/sminv/5065065.html>

Workday 2024 release 2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
	<p>The following new items have been delivered:</p> <ul style="list-style-type: none"> • ECRI Inbound Package that can be used on third party integration • Recall Workbench • Review Recall Line Details task • External Sourceable ID on Find Recall report 	<p>Y/N: No</p> <p>Impact description:</p> <p>This is an opt-in feature.</p> <p>A new ECRI Inbound Package is available for use.</p> <p>Update materials for recalling items to indicate that new Recall Workbench and Review Recall Line Details task is available.</p>

Effort 10 hours*

Need to review with a Procurement and INT resource to properly scope effort

Defect link N/A

Community link <https://doc.workday.com/release-notes/en-us/sminv/5065065.html>

Workday release 2 setup based features

Before release

Find Recall [Close]

[View Report Definition](#)

Recall Number

Recall Reference Number

Recall Source

Recall Severity

Recall Category

Manufacturer Name

Distributor

After release

Recall Workbench

[Refresh](#)

[Unmatched](#) [Matched](#)

Unmatched 0 items

<input type="checkbox"/>	Recall Number	Recall Description	Review	External Recall ID	Recall Status	Manufacturer Name
No Data						

Find Recall [Close]

External Sourceable ID

Recall Number

Recall Reference Number

Recall Source

Recall Severity

Recall Category

Manufacturer Name

Procurement - Third party integration for recall management through web services

What's changing

With the 2024R2 release, Workday provides the ability to automatically create recall alerts in Workday through third party integration systems.

Workday enables greater automation of the recall processes and eliminate the need to manually find new recall notifications from multiple sources to determine if they're relevant.

Additional considerations

Workday updates these web services to support third party integrations for recall management: Get Recall and Submit Recall

Workday adds these fields to the web services:

- External Recall ID, which displays the assigned recall ID from an external source.
- External Recall Source, which displays the external origin of the recall, such as your third party integration, the FDA, or an item manufacturer.
- Recall URL, which displays the external URL for the recall alert hosted on your third party website.

Workday also delivers a Recall Data field to the Submit Recall web services, which displays a JSON file for the recall.

What do i need to do?

To configure the ECRI integration, you must acquire and deploy the ECRI Inbound Packaged Solution. Workday included the steps to configure the integration in the packaged solution.

What happens if i do nothing?

N/A

Community link

<https://doc.workday.com/release-notes/en-us/sminv/8040248.html>

Workday 2024 release 2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
	<p>Get Recall and Submit Recall web services has been updated to support third party integration for Recall Management, and added the following new fields:</p> <ul style="list-style-type: none"> • External Recall ID • External Recall source • Recall URL • Recall Data 	<p>Y/N: No</p> <p>Impact description:</p> <p>New fields added to the Get Recall and Submit Recall web services to support third party integration for Recall Management. Update relevant materials.</p>

Effort <Hours>

Additional description if applicable

Defect link <Hyperlink here if applicable>

Community link <https://doc.workday.com/release-notes/en-us/sminv/8040248.html>

Procurement - Increase flexibility for lot and serial controlled

What's changing

With the 2024R2 release, Workday now enables you to configure lot and serial control at the item inventory site level instead of strictly at the purchase item overview level. This provides more flexibility for your organization to track lot and serial numbers between locations and at specific points in your supply chain.

Additional considerations

Workday now adds lot and serial options to the **Inventory Site Options** tab on these tasks, expanding lot and serial control to specific inventory sites for the item:

- Create Purchase Item
- Edit Purchase Item
- Maintain Item Inventory Site Attributes

Workday has added these options to the Inventory Site Options tab:

- **Lot Control**
- **Serial Control Type**
- **Inbound Alert Period in Days**
- **Outbound Alert Period in Days**

What do i need to do?

The new inventory site options are available on the **Create Purchase Item** task, the **Edit Purchase Items** task, and the **Maintain Inventory Site Attributes** task. When you utilize the **Maintain Inventory Site Option** purchase item request template, you need to update your template using the **Edit Purchase Item Request Template** task and add the new fields for lot and serial tracking. Additionally, you also must update any custom reporting that you are currently utilizing to view inventory site option configuration to include the new inventory site options:

- Is Lot Controlled
- Serial Control Type
- Outbound Alert Period in Days

Community link

<https://doc.workday.com/release-notes/en-us/sminv/8040243.html>

Procurement - Increase flexibility for lot and serial controlled items (cont.)



Additional considerations (Cont.)

Workday also updates the **Maintain Inventory Site Options** purchase item request template on the **Edit Purchase Item Request Template** task to support the lot and serial options listed above.

We deliver these new report fields on the Item Inventory Attributes Abstract business object (secured to the Public Reporting Items domain) that you can use on custom reports and condition rules:

- Inbound Alert Period in Days
- Is Lot Controlled
- Outbound Alert Period in Days
- Serial Control Type

What do i need to do?

Your inventory site options will now have the new site level configuration fields for lot and serial control. Users will be able to override the item level lot and serial control options at individual inventory sites if no transactions have occurred for the item in that site.

Community link

<https://doc.workday.com/release-notes/en-us/sminv/8040243.html>

Workday 2024 release 2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
<p>Inventory Site do not have lot and serial options when creating/updating purchase items.</p>	<p>You can now input lot and serial information on the inventory site of purchase items.</p>	<p>Y/N: No</p> <p>Impact description:</p> <p>Update materials to indicate that inventory site has now lot and serial options. If using Maintain Inventory Site Option purchase item request template, update it. Update applicable report where inventory site is utilized.</p>

Effort <Hours>

Additional description if applicable

Defect link <Hyperlink here if applicable>

Community link <https://doc.workday.com/release-notes/en-us/sminv/8040243.html>

Workday release 2 setup based features

Before release

Create Purchase Item

Item Overview Related Worktags Supplier Information **Inventory Site Options** Item Substitutes

+ Add

Location

Inventory Site *

Item Status for Site *

Just In Time

Stocking and Fulfillment Options

Default Stocking Unit of Measure

Default Stocking Location

Valid Stocking Locations

Valid Issue Units of Measure

Default Issue Unit of Measure

Fulfillment Lead Time

Preferred Picking Location

Use Reservations

Counting Options

ABC Classification

Include in Count

After release

Create Purchase Item

Just In Time

Stocking and Fulfillment Options

Default Stocking Unit of Measure

Default Stocking Location

Valid Stocking Locations

Valid Issue Units of Measure

Default Issue Unit of Measure

Fulfillment Lead Time

Preferred Picking Location

Use Reservations

Counting Options

ABC Classification

Include in Count

Lot and Serial Control

Lot Control

Serial Control Type *

Lot Options

Inbound Alert Period in Days

Outbound Alert Period in Days

Procurement - Increase flexibility for lot and serial controlled items for web services

What's changing

With the 2024R2 release, Workday now enables you to configure lot and serial control at the item inventory site level instead of strictly at the purchase item overview level. This provides more flexibility for your organization to track lot and serial numbers between locations and at specific points in your supply chain.

Additional considerations

Workday has updated these web services to support lot and serial control options at the inventory site attribute level on purchase items:

- Get Purchase Items
- Get Purchase Item Request Templates
- Put Purchase Item
- Put Purchase Item Request Template

What do i need to do?

N/A

What happens if i do nothing?

N/A

Community link

<https://doc.workday.com/release-notes/en-us/sminv/8040248.html>

Workday 2024 release 2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
<p>Inventory Site do not have lot and serial options when creating/updating purchase items.</p>	<p>You can now input lot and serial information on the inventory site of purchase items. With this, the following web service have updated to incorporate theses changes:</p> <ul style="list-style-type: none"> Get Purchase Items Get Purchase Item Request Templates Put Purchase Item Put Purchase Item Request Template 	<p>Y/N: Yes</p> <p>Impact description:</p> <p>To utilize the inventory site lot and serial options on web service, make sure to update the web services to latest version.</p>

Effort 10 hours*

Scope should be confirmed with an Inventory Consultant

Defect link N/A

Community link <https://doc.workday.com/release-notes/en-us/sminv/8040245.html>

Procurement - Instructional user help text in the requisition worklet

What's changing

With the 2024R2 release, Workday enables you to configure key instructions in the **Requisitions** worklet for your requesters to follow. You can now create and display instructional text for the general **Requisitions** worklet experience and the ordering methods in the worklet.

Additional considerations

Workday has updated the **Requisitions** worklet to now support instructional help text at the top of the home page and for the ordering methods in the **Ordering Methods** card of the worklet.

When you enter instructional text in the **Requisition** section of the **Create/Edit Spend Transaction Instruction** task, Workday now also displays that text at the top of the home page in the **Requisitions** worklet. This instructional text is specific to each company.

When you enter instructional text for an ordering method on the **Create/Edit Cart Link Override** task, Workday also displays that text for the ordering method in the **Ordering Methods** card of the **Requisitions** worklet. This instructional text is applicable across your tenant and not specific to company.

What do i need to do?

To use instructional user help text in the **Requisitions** worklet, you need to do the following:

- For general instructional text: Access the **Create/Edit Spend Transaction Instruction** task and enter instructions in the **Requisition** section to display at the top of the home page in the **Requisitions** worklet. Select **Active** to activate the instructional text. This instructional text is configured by company.
- For instructional text on ordering methods: Access the **Create/Edit Cart Link Override** task and select the ordering method you want to provide instructions for from the **Link To Override** field. Enter the instructions for the ordering method you've selected in the **Instructional Text Override** field. This instructional text is applicable across your tenant and not specific to company.

Community link

<https://doc.workday.com/release-notes/en-us/sminv/8040248.html>

Procurement - Instructional user help text in the requisition worklet

What happens if I do nothing?

For general instructional text: You'll see no changes in Workday and your users won't see any changes in their **Requisitions** worklet experience if you don't do anything. If you've previously configured general instructions for the **Create Requisition** task through the **Create/Edit Spend Transaction Instruction** task, Workday now also displays that text on the home page of the **Requisitions** worklet.

For instructional text on ordering methods: Your users will see the default instructions that Workday provides for ordering methods in the **Requisitions** worklet. These instructions are currently the default descriptions that Workday provides for the ordering methods on the **Create Requisition** task. If you've previously configured cart link override text for the **Create Requisition** task, Workday will now also display that text for the ordering methods in the **Requisitions** worklet.

Community link

<https://doc.workday.com/release-notes/en-us/smreg/7636002.html>

Workday 2024 release 2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
<p>Requisitions worklet does not have an option to configure key instructions and ordering methods.</p>	<p>Workday allows you to add key instructions and ordering methods instruction for Requisitions Worklet.</p>	<p>Y/N: No</p> <p>Impact description:</p> <p>You can configure these instructions if you need. You will see no changes if these are not configured.</p>

Effort 1 hour*

Scope should be confirmed with an Inventory Consultant

Defect link N/A

Community link <https://doc.workday.com/release-notes/en-us/smreq/7636002.html>

Workday release 2 setup based features

Before release

Requisitions

Requisitions (Past 6 Months) Edit Filters

Open (17) Completed (0)

REQ-*** Awaiting Action by Rachel Knight
Total Amount: Created on 08/22/2024

REQ-*** Awaiting Action by Rachel Knight
Total Amount: Created on 08/22/2024

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Total Amount: Created on 08/22/2024

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Total Amount: Created on 08/22/2024

REQ-*** Awaiting Action by Rachel Knight
Total Amount: Created on 08/22/2024

REQ-*** Awaiting Action by Rachel Knight
Total Amount: Created on 08/22/2024

REQ-*** Approved
Total Amount: Created on 07/02/2024

REQ-*** Approved
Total Amount: Created on 06/19/2024

Requisition Details

Requesting for
Teresa Serrano

Company
Global Modern Services, Inc. (USA)

Currency
USD (\$)

Deliver-To
Office of the CFO

Ship-To

Worktags

Ordering Methods

- [Search Catalog](#)
Search the internal catalog of preferred items and suppliers to add into the...
- [Request Non-Catalog Items](#)
Add a good or service that is not in the catalog
- [Connect to Supplier Website](#)
Request goods and services from Supplier Websites
- [Add from Templates and Requisitions](#)
Select from Requisition templates and past Requisitions
- [Select from My Procurement Favorites](#)
Select from my Favorite Items
- [Request Project-Based Services](#)
Provide project details to request a project related service

After release

Requisitions

Instructions ^

Test Instruction

Requisition Details

Requesting for
Teresa Serrano

Company
Global Modern Services, Inc. (USA)

Currency
USD (\$)

Deliver-To
Office of the CFO

Ship-To

Requisitions (Past 6 Months) Edit Filters

Open (17) Completed (0)

REQ-*** Awaiting Action by Rachel Knight
Total Amount: Created on 08/22/2024

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Total Amount: Created on 08/22/2024

REQ-*** Awaiting Action by Rachel Knight
Total Amount: Created on 08/22/2024

REQ-*** Approved
Total Amount: Created on 07/02/2024

REQ-*** Approved
Total Amount: Created on 06/19/2024

Ordering Methods

- [Search Catalog](#)
Search the internal catalog of preferred items and suppliers to add into the...
- [Request Non-Catalog Items](#)
Add a good or service that is not in the catalog
- [Connect to Supplier Website](#)
Request goods and services from Supplier Websites
- [Test Instruction](#)
Provide project details to request a project related service
[Instructions](#)
Please follow the instructions to request project related service

Test Instruction Provide project details to request a project related service...

Procurement - Procurement card delegates edit all fields in procurement card verifications

What's changing

Procurement card delegates now can view and edit procurement card verifications that are in Draft status in the My Procurement Card Transaction Verification report.

Note: In Preview, both reports are viewable and testable. (The new report is, "My Procurement Card Transaction Verifications +TG" and the old report is, "My Procurement Transaction Verifications.") In Production, Workday renames the old report, "My Procurement Card Transaction Verifications - Do Not Use report"; this report will be retired after 6-9 months.

Additional considerations

Workday delivers a new My Procurement Card Transaction Verifications report to enable procurement card delegates to view and edit procurement card verifications that are in Draft status. This new report replaces the My Procurement Card Transaction Verifications report.

Workday also renames the My Procurement Card Transaction Verifications report to My Procurement Card Transaction Verifications - Do Not Use report. The new report enables additional functionality for procurement card delegates

What do i need to do?

Discontinue using the old report, My Procurement Card Transaction Verifications -Do Not Use, and use the My Procurement Card Transaction Verifications report instead.

You can optionally use the Hide Workday Delivered report to hide the My Procurement Card Transaction Verifications - Do Not Use report. This prevents the report from displaying in search results and menus.

If you have the My Procurement Card Transaction Verifications - Do Not Use report on any dashboards or home screens, you should replace the report with the new My Procurement Card Transaction Verification report.

What happens if I do nothing?

Procurement card delegates are not able to view and edit fields in procurement card verifications that are in Draft status.

Community link

<https://doc.workday.com/release-notes/en-us/finsa/8014169.html>

Workday 2024 release 2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
<p>My Procurement Card Transaction Verification report is still available.</p>	<p>Procurement Card delegate can now edit procurement card verification that is in Draft status. The My Procurement Card Transaction Verification report will be renamed and appended Do Not Use which will be retired in 6-9 months. A new My Procurement Card Transaction Verification report can be used instead.</p>	<p>Y/N: Yes</p> <p>Impact description:</p> <p>Update materials to indicate that Procurement Card delegate can now updated/edit procurement card verification that is in draft status.</p> <p>Please use the new report My Procurement Card Transaction Verification. Old one will be renamed and discontinued.</p>

Effort <N/A

Additional description if applicable

Defect link N/A

Community link <https://doc.workday.com/release-notes/en-us/finsa/8014169.html>

Purge financial attachments

What's changing

With the 2024R2 release, Workday enables you to purge attachments on multiple financial entities. Purging attachments helps you meet privacy and document retention requirements.

Additional considerations

You can now use the Purge Person Data task to purge many different Financial attachments and their details. See the attached file on the community link for a full list of all purgeable Financial entities.

What do i need to do?

1. Create a privacy purge custom report on the relevant report data source. See **Create a Privacy Purge Custom Report**.
2. Access the Purge Person Data task and select the custom report. See **Steps: Purge Person Privacy Data**.
 - If applicable, use the report field Has Attachments at the report line level when creating the privacy purge custom report to limit the instances returned by the purge report.
 - If your report data source doesn't have this field, the report could include instances without attachments. However, the purge process won't impact these instances.
 - After you purge attachments, you can still see that there were attachments on financial entities. You can't view details about or download these attachments, and Workday no longer stores this information.
 - Workday can't reverse or roll back the deletion/purge in your tenant.

What happens if i do nothing?

You'll see no changes in Workday.

Community link

<https://doc.workday.com/release-notes/en-us/finsa/8014169.html>

Workday 2024 release 2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
	<p>Purging attachment on multiple financial entities is now enabled. For list of all purgeable financial entities, refer to the attachment on the community link. The task than can be used is Purge Data Person.</p>	<p>Y/N: No</p> <p>Impact description:</p> <p>Update materials to indicate that purging attachment on multiple financial entities is now enabled. You need to create custom report to list transaction with attachment that needs to be purge.</p>

Effort TBD

Depending on number if attachments end client is attempting to purge

Defect link

N/A

Community link

<https://doc.workday.com/release-notes/en-us/fincore/7034994.html>

Workday release 2 setup based features

Before release

N/A

After release

Purge Person Data

Population to Purge (Report Definition) *

select custom reports listing transactions with attachment that needs to be purge

Cancel OK

Thank you