

# Workday 2024 R2 Release Impact Analysis

<Security>

2024

# Security



# **Automatically available features**

# Security automatic features

Cognizant Consultants have prepared a list of automatic features for the upcoming 2024 R2 Workday release. These features are delivered automatically by Workday and no set up is required from your end.

## Security

# Security - Compensation security enhancements

## What's changing

For the 24R2 release, Workday further enhances the security on several of our Compensation web services to support contextual security configurations.

This enhancement improves security across Compensation Change web services, further enabling you to consistently control the contextual access users are granted when retrieving or loading data through these web services.

## Additional considerations

Workday enhances the security of Compensation Change web services and Staffing web services that involve changing compensation for a worker.

## What do i need to do?

- Nothing. This feature is automatically available.

## What happens if i do nothing?

- N/A

Community link

<https://doc.workday.com/release-notes/en-us/hrcomp/8154266.html>

# Workday 2024 release 2 automatically available features

Prior to 2024 release 1	Post 2024 release 2	Impact
N/A	<ul style="list-style-type: none"><li>Enhanced security of Compensation Change web services</li></ul>	<div>Y/N: No</div> <div>Impact description:</div> <div>N/A</div>

Effort

<Hours>

Additional description if applicable

Defect link

Not applicable

Community link

<https://doc.workday.com/release-notes/en-us/hrcomp/8154266.html>

# Accounting source analytics data source security configuration

## What's changing

With the 2024 R2 release, Workday enables you to make bulk updates to the Prism Data Source security configuration for all reportable tables and datasets for an accounting source. You no longer have to access and run the **Edit Data Source Security** task for each table and dataset individually. You can now use a single task to change the reporting permissions for each table and dataset in an accounting source.

## Additional considerations

### Business benefits

This reduces maintenance and increases efficiency in configuring reporting permissions for an accounting source.

### Changes

Edit Accounting Source Prism Data Source Security Task

We now deliver a new **Edit Accounting Source Prism Data Source Security** task (secured to the *Setup: Accounting Source - Create domain*) that enables you to configure domains and securing entities for all reportable tables and datasets for an accounting source.

## What do i need to do?

Nothing. This feature is automatically available.

## Delivery details

Preview Date:

Production Date: **2024-09-21**

Service Update Date:

There seems to have a problem as this feature is not available in Preview.

As of 22-08-2024, Workday will follow up on the community link once the domain is available in the tenant.

Community link

Accounting Source Analytics Data Source  
Security Configuration (workday.com)

# Accounting source analytics data source security configuration

## What's changing

With the 2024 R2 release, Workday enables you to make bulk updates to the Prism Data Source security configuration for all reportable tables and datasets for an accounting source. You no longer have to access and run the **Edit Data Source Security** task for each table and dataset individually. You can now use a single task to change the reporting permissions for each table and dataset in an accounting source.

## Additional considerations

View Accounting Source Prism Data Source Security Report

We now deliver a new **View Accounting Source Prism Data Source Security** report (secured to the Setup: Accounting Source - Create domain) that enables you to view the data source security for all reportable tables and datasets for an accounting source

## What do i need to do?

Nothing. This feature is automatically available.

## Delivery details

Preview Date: **2024-08-17**

Production Date: **2024-09-21**

Service Update Date: **2024-08-17**

Community link

[Accounting Source Analytics Data Source Security Configuration \(workday.com\)](#)



# Workday 2024 R2 automatically available features

Prior to 2024 R2	Post 2024 R2	Impact
Users will have to run the <b>Edit Data Source Security</b> task for each table and dataset individually.	<p>You can now use a single task to change the reporting permissions for each table and dataset in an accounting source.</p> <p>This reduces maintenance and increases efficiency in configuring reporting permissions for an accounting source.</p>	<div>Y/N: No impact</div> <div>Impact description:</div>

Effort

Additional description if applicable

Defect link

Not applicable

Community link

[Compensation Security Enhancements \(workday.com\)](#)

# Learning assignments security update

## What's changing

We enhance security for travel booking files imported from travel management companies, enabling you to provide users with only unconstrained access to travel booking files.

## Additional considerations

### Business Benefits

These security enhancements provide greater control over travel booking files so you can provide adequate security permissions to users who manage the files and travel booking records within them.

### Changes

We deliver a new Process: Travel Booking Files domain, enabling you to provide unconstrained access to users who manage travel booking record data that originates from travel booking files.

We automatically move the components listed below from the existing Process: Travel Booking domain to the new Process: Travel Booking Files domain.

## What do i need to do?

Use the Security Audit Exception task to identify constrained security groups that are no longer permitted on the new Process: Booking Files domain.

- Remove any constrained security groups that you identify from the security policy for the new domain.
- The security groups that remain on the new domain will have unconstrained access to travel booking files.

If you have constrained groups on your travel booking integration system, move them to unconstrained groups so your travel booking integrations aren't impacted.

Community link

[Enhanced Security for Travel Booking Data  
\(workday.com\)](https://workday.com)

# Enhanced security for travel booking data

## What's changing

We enhance security for travel booking files imported from travel management companies, enabling you to provide users with only unconstrained access to travel booking files.

## Additional considerations

Tasks:

- **Edit Records with Errors from Travel Booking File**
- **Maintain City Mapping**
- **Maintain Merchant Mapping**
- **View Travel Booking File**
- Report: **Find Travel Booking Record Files**
- Data source: Travel Booking Files
- Web services:
  - Get Travel Booking Files
  - Import Travel Booking Records

## What happens if i do nothing?

This feature is automatically available. If you choose to do nothing, Workday still:

- Copies all configured security groups from the existing Process: Travel Booking domain to the new Process: Travel Booking Files domain, including pending security policy changes.
- Moves the components detailed in the Changes field above, from the existing Process: Travel Booking domain to the new Process: Travel Booking Files domain.

Community link

[Enhanced Security for Travel Booking Data  
\(workday.com\)](https://workday.com/enhanced-security-for-travel-booking-data)

# Enhanced security for travel booking data

## What's changing

We enhance security for travel booking files imported from travel management companies, enabling you to provide users with only unconstrained access to travel booking files.

## Additional considerations

Notes:

Workday automatically copies all security groups from the Process: Travel Booking domain to the new Process: Travel Booking Files domain, including pending security policy changes. As the new domain supports only unconstrained groups, you must remove constrained groups to avoid inconsistent behavior when running these tasks on the integration event for travel booking files:

- **Edit Records with Errors from Travel Booking File**
- **Maintain City Mapping**
- **Maintain Merchant Mapping**

## What happens if i do nothing?

This feature is automatically available. If you choose to do nothing, Workday still:

- Copies all configured security groups from the existing Process: Travel Booking domain to the new Process: Travel Booking Files domain, including pending security policy changes.
- Moves the components detailed in the Changes field above, from the existing Process: Travel Booking domain to the new Process: Travel Booking Files domain.

Community link

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\(workday.com\)](https://workday.com/enhanced-security-for-travel-booking-data)

# Enhanced security for travel booking data

## What's changing

We enhance security for travel booking files imported from travel management companies, enabling you to provide users with only unconstrained access to travel booking files.

## Additional considerations

If you add an intersection security group on the new Process: Travel Booking Files domain and the group includes constrained and unconstrained users, constrained users can still access tasks, reports, and data sources without restrictions. This is existing behavior and remains unchanged. The existing Process: Travel Booking domain will continue to support company-based roles and unconstrained security groups.

## What happens if i do nothing?

This feature is automatically available. If you choose to do nothing, Workday still:

- Copies all configured security groups from the existing Process: Travel Booking domain to the new Process: Travel Booking Files domain, including pending security policy changes.
- Moves the components detailed in the Changes field above, from the existing Process: Travel Booking domain to the new Process: Travel Booking Files domain.

Community link

[Enhanced Security for Travel Booking Data  
\(workday.com\)](https://workday.com/enhanced-security-for-travel-booking-data)

# Workday 2024 R2 automatically available features

## After release

Find Travel Booking Record Files

File Date On or After

MM/DD/YYYY

File Date On or Before

MM/DD/YYYY

Filter Name

Manage Filters

0 Saved Filters

Save

Cancel

OK

# Workday 2024 R2 automatically available features

## After release

Find Travel Booking Record Files

Find Travel Booking Record Files 2 items

Travel Booking Record File	File Name	File Date	Total Records	Records in New Status	Records in Error	Records Missing Merchants	Records Missing Cities
<a href="#">TravelFileName1000</a>	TravelFileName1000		10	10	0	0	0
<a href="#">TravelFileName2000</a>	TravelFileName2000		10	6	3	3	8

TravelFileName2000

View Travel Booking File

Travel Booking File Information

Travel Booking File

File Name

File Load Date

TravelFileName2000

(empty)

Map Merchants

Map Cities

Transaction Counts

Total Records

Records in New Status

Records in Error

Records Missing Merchants

Records Missing Cities

10

6

3

3

8

Travel Booking Records 10 items

Travel Booking Record	Record Status	Account Holder Name	Employee ID	Worker	Company	Itinerary Number	Reservation Number	Travel Record Date	Booking Status	Travel Type	Merchant Name	Merchant Mapped	Destination
Q	New	Maximilian Schneider			500.1 Global Modern Services, Inc. (USA)	Itinerary4	NFD0RW	12/28/2013	Active	Air	United Airlines	United	Chicago
Q	Closed	Maximilian Schneider			500.1 Global Modern Services, Inc. (USA)	Itinerary5	C3YRGG	01/03/2014	Canceled	Hotel	Hyatt Atlanta	Hyatt	Atlanta
Q	New	Maximilian Schneider			500.1 Global Modern Services, Inc. (USA)	Itinerary5	X9WM2Z	10/25/2013	Active	Air	Virgin Atlantic		London
Q	New	Maximilian Schneider	21004	Maximilian Schneider (COO, Mgr 6000)	500.1 Global Modern Services, Inc. (USA)	Itinerary4	P0UNBI	12/28/2013	Active	Hotel	Hilton		Chicago
Q	New	Maximilian Schneider	21004	Maximilian Schneider (COO, Mgr 6000)	500.1 Global Modern Services, Inc. (USA)	Itinerary4	D7EVSR	12/28/2013	Active	Car Rental	Hertz Rent-a-Car	Hertz	Chicago
Q	Closed	Maximilian Schneider	21004	Maximilian Schneider (COO, Mgr 6000)	500.1 Global Modern Services, Inc. (USA)	Itinerary5	B9CP4M	01/03/2014	Canceled	Air	Delta Airlines	Delta	Atlanta

# Workday 2024 R2 automatically available features

Prior to 2024 R2	Post 2024 R2	Impact
	<p>We deliver a new Process: Travel Booking Files domain, enabling you to provide unconstrained access to users who manage travel booking record data that originates from travel booking files.</p> <p>We automatically move the components listed below from the existing Process: Travel Booking domain to the new Process: Travel Booking Files domain.</p>	<div>Y/N: Yes</div> <div>Impact description:</div> <p>Use the Security Audit Exception task to identify constrained security groups that are no longer permitted on the new Process: Booking Files domain.</p>

Effort

Additional description if applicable

Defect link

Not applicable

Community link

[Enhanced Security for Travel Booking Data \(workday.com\)](#)



# Learning assignments security update

## What's changing

With this release, Workday constrains the Learning Assignment object to allow for the use of role-based constrained security groups. This provides organizations the flexibility to allow role-based constrained security groups access to view and report on Learning Assignment data for the learners they support.

## Additional considerations

### Business benefits

Constraining the security for Learning Assignments provides greater flexibility for organizations allowing more decentralized management of assignments and related reporting. For example, you can create and share reports with managers, and they only see relevant information related to their teams.

### Changes

#### Security:

We secure Learning Assignments to these domains:

- Person Data: Learning
- Reports: Learning Record
- Self Service: Learning

## What do i need to do?

The Learning Assignment data source is automatically updated to allow for role-based constrained security groups. You can modify your security setup to grant specific roles access to Learning Assignment information.

## What happens if i do nothing?

If you choose to do nothing, you can continue to use the existing reports for security auditing.

Community link

[Learning Assignments Security Update  
\(workday.com\)](https://workday.com)

# Learning assignments security update

## What's changing

With this release, Workday constrains the Learning Assignment object to allow for the use of role-based constrained security groups. This provides organizations the flexibility to allow role-based constrained security groups access to view and report on Learning Assignment data for the learners they support.

## Additional considerations

### Reporting:

Data Source filters are no longer required when creating reports using the **Learning Assignment Records** data source. Constrained access to assignments automatically applies in the background when running the reports. There is no impact on existing reports; you can still use the current data source filters.

We deliver new report fields to return the current supervisory organization, location, and affiliation for all learners and extended enterprise learners from the Learning Assignment business object and the Learning Record business object:

## What do i need to do?

The Learning Assignment data source is automatically updated to allow for role-based constrained security groups. You can modify your security setup to grant specific roles access to Learning Assignment information.

## What happens if i do nothing?

If you choose to do nothing, you can continue to use the existing reports for security auditing.

Community link

[Learning Assignments Security Update  
\(workday.com\)](https://workday.com)

# Learning assignments security update

## What's changing

With this release, Workday constrains the Learning Assignment object to allow for the use of role-based constrained security groups. This provides organizations the flexibility to allow role-based constrained security groups access to view and report on Learning Assignment data for the learners they support.

Name	Description	Security
Learner's Location (Current)	The current location for the learner.	<ul style="list-style-type: none"><li>• Self Service: Learning</li><li>• Reports: Learning Record</li><li>• Person Data: Learning</li></ul>
Learner's Extended Enterprise Affiliation (Current)	The current extended enterprise affiliation for the learner.	<ul style="list-style-type: none"><li>• Self Service: Learning</li><li>• Reports: Learning Record</li><li>• Person Data: Learning</li></ul>
Learner's Supervisory Organization (Current)	The current supervisory organization for the learner.	<ul style="list-style-type: none"><li>• Self Service: Learning</li><li>• Reports: Learning Record</li><li>• Person Data: Learning</li></ul>

## What do i need to do?

The Learning Assignment data source is automatically updated to allow for role-based constrained security groups. You can modify your security setup to grant specific roles access to Learning Assignment information.

## What happens if i do nothing?

If you choose to do nothing, you can continue to use the existing reports for security auditing.

Community link

[Learning Assignments Security Update  
\(workday.com\)](https://workday.com/learning-assignments-security-update)

# Workday 2024 R2 automatically available features

## After release

Edit Custom Report

Learning Assignment Records

Report Name

\*

Learning Assignment Records

Report Type

Advanced

Data Source

\*

Learning Assignment Records

Data Source Filter

Data Source Type

Indexed

Primary Business Object

Learning Assignment

>

Additional Info

Data Source Filter is no longer required

# Workday 2024 R2 automatically available features

## After release

SH

Stan Harvey

Actions

Job Details

Management Chain

Organizations

Worker Security

Member of These Organizations 2 items

Organization	Organization Type	Organization Subtype
2.5 UK / Ireland	Location Hierarchy	Country
Learning Organisation 3	Supervisory	Department

View Role-Based Security Group (Constrained)

Location Learning Admin

Name

Location Learning Admin

Context Type

Constrained by Role Access

Group Criteria

Assignable Role

Location Learning Admin

Access Rights to Organizations

☐ Applies to Current Organization Only

☒ Applies To Current Organization And Unassigned Subordinates

☐ Applies to Current Organization And All Subordinates

☐ Applies to Current Organization and Subordinates to Level

Subordinate Levels

0

Access Rights to Multiple Job Workers

☒ Role has access to the positions they support

☐ Role for primary job has access to all positions

☐ Role has access to all positions

Domain Security Policy Permissions 1 item

Operation	Domain Security Policy	Domain Security Policies Inheriting Permission	Functional Areas
View and Modify	Person Data: Learning		Learning Core

# Workday 2024 R2 automatically available features

## After release

2.5 UK / Ireland

TypeLocation HierarchySuperior Organization2.0 Europe

MembersDetailsRolesSecurity GroupsOrganization Assignments

1 of 50 items

Assignable Role	Assigned To	Role From	Effective Date
Location Learning Admin	Stan Harvey	Assigned	06/10/2024

# Workday 2024 R2 automatically available features

## After release

Learning Assignment Records

Worker

Learning Content

Filter Name

Manage Filters

0 Saved Filters

Save

Cancel

OK

As Location Learning Administrator, run the Learning Assignment Records and leave all prompts blank.

# Workday 2024 R2 automatically available features

## After release

The report will show only those who are in the location hierarchy where the processing user supports.

Learning Assignment Records 169 items

Learner	Learning Content	Assigned By	Assigned Date	Learner's Location (Current)	Learner's Supervisory Organization (Current)	Learner's Extended Enterprise Affiliation (Current)	Location on Completion	Supervisory Organization on Completion	Required	Assignment Mechanism	Assignment Status	Assignment Record Completion Moment
Alison Cotterill	DS - Learning Program	Kitty Jervis	14/05/2020 13:03:23.078	Dublin	Learning Organisation 3				No	Campaign	Open	
Alison Cotterill	DS Compliance Lesson	Kitty Jervis	14/05/2020 13:03:23.078	Dublin	Learning Organisation 3		Dublin	Learning Organisation 3	No	Campaign	Completed	19/11/2021 12:50:45.389
Alison Cotterill	Introverts and Leadership	Kitty Jervis	14/05/2020 13:03:23.078	Dublin	Learning Organisation 3				No	Campaign	Open	
Alison Cotterill	Embracing Creativity	Kitty Jervis	14/05/2020 13:03:23.078	Dublin	Learning Organisation 3				No	Campaign	Open	
Alison Cotterill	How to Use Mind Maps	Andy Fraiser	20/09/2023 16:36:37.687	Dublin	Learning Organisation 3				No	Campaign	Open	
Alison Cotterill	Emergency Response Procedures	Kitty Jervis	24/04/2024 16:33:48.549	Dublin	Learning Organisation 3				Yes	Campaign	Open	
Alison Cotterill	Engage through Storytelling	Jill Richardson	27/11/2019 17:18:02.406	Dublin	Learning Organisation 3				Yes	Manager Enroll	Open	
Alison Cotterill	Data Privacy Training	Jill Richardson	27/11/2019 17:18:31.649	Dublin	Learning Organisation 3				Yes	Manager Enroll	Open	
Alison Cotterill	Lost Customers: How to Win Them Back	Jill Richardson	27/11/2019 17:19:02.891	Dublin	Learning Organisation 3				Yes	Manager Enroll	Open	
Alison Cotterill	Growth Hacking Marketing Masterclass	Jill Richardson	27/11/2019 17:19:33.094	Dublin	Learning Organisation 3				Yes	Manager Enroll	Open	
Alison Cotterill	Time Management	Jill Richardson	27/11/2019 17:22:11.160	Dublin	Learning Organisation 3				Yes	Manager Enroll	Open	
Alison Cotterill	Radical Transparency-Blended Course	Jill Richardson	27/11/2019 17:23:09.862	Dublin	Learning Organisation 3				Yes	Manager Enroll	Open	



# Workday 2024 R2 automatically available features

Prior to 2024 R2	Post 2024 R2	Impact
	<p>We secure Learning Assignments to these domains:</p> <ul style="list-style-type: none"><li>• Person Data: Learning</li><li>• Reports: Learning Record</li><li>• Self Service: Learning</li></ul> <p>Data Source Filter for Learning Assignment Record RDS is no longer required.</p>	<div>Y/N:</div> May impact your training materials  <div>Impact description:</div> <p>Use the Security Audit Exception task to identify constrained security groups that are no longer permitted on the new Process: Booking Files domain.</p>

Effort

Additional description if applicable

Defect link

Not applicable

Community link

[Learning Assignments Security Update \(workday.com\)](#)

# Role-Based security for transfer credit

## What's changing

We continue to improve and extend role-based security access for components across Workday Student.

## Additional considerations

### Business benefits

This feature gives you more configuration flexibility in your tenant.

### Changes

We update these domains to support role-based security for transfer credit:

- Manage: Delete Student Transfer Credit
- Manage: Student Transfer Credit

On these domains, we add these allowed security groups, in addition to the existing allowed security group types:

- Roles - Academic Record
- Roles - Student Cohort
- Roles - Student Cohort Collections

## What do i need to do?

This feature is automatically available. We recommend that you update your training materials so that users are aware of the changes.

## What happens if i do nothing?

If you choose to do nothing, you can continue to use the existing reports for security auditing.

Community link

[Role-Based Security for Transfer Credit  
\(workday.com\)](https://workday.com)

# Role-Based security for transfer credit

## What's changing

We continue to improve and extend role-based security access for components across Workday Student.

## What's changing

Users with these roles can now view, assign, and manage transfer credits for the students they have access to. Example: Users with a student cohort role can access the transfer credits on the academic records currently in that cohort.

We also update these tasks so that users can only initiate evaluate and grant transfer credits for only the academic records they have access to:

- **Initiate Transfer Credit Evaluation**
- **Launch Mass Transfer Credit Evaluation**

## What do i need to do?

This feature is automatically available. We recommend that you update your training materials so that users are aware of the changes.

## What happens if i do nothing?

This feature is automatically available. We recommend that you update your training materials so that users are aware of the changes.

Community link

[Role-Based Security for Transfer Credit  
\(workday.com\)](https://workday.com)

# Workday 2024 R2 automatically available features

Prior to 2024 R2	Post 2024 R2	Impact
	Security Domains Manage: Student Educational Data (existing) Manage: Student Educational Institution Attendances (existing) Manage: Student External Transcripts (existing) Manage: Student Test Results (existing) Reports: Student External Transcripts (existing) Student Data: Educational Institution (existing) Student Data: External Records (existing) Student Data: External Transcript (existing) Student Data: Test Results (existing)	<div>Y/N:</div> May impact your training materials <div>Impact description:</div>

Effort

Additional description if applicable

Defect link

Not applicable

Community link

[Role-Based Security for Transfer Credit \(workday.com\)](#)

# Role-Based security reporting

## What's changing

Workday continues to improve how you audit role-based security, making it easier for you to view role-based security access for workers and role assigners, and to build custom reports.

## Additional considerations

- There are no restrictions on the combinations of role assigner and assignable role values that can be selected.
- If you select only multiple workers, role assigners, or assignable roles from the prompts, the report will return results for the workers, role assigners, or assignable roles selected.
- If you select a combination of a worker, role assigner, and an assignable role from the prompts, the report returns results that combine the 3. If the report can't meet all three criteria, it doesn't return any results.
- In the Role Assignee column:
- If there's no job title, the column displays the job posting.
- If there's a future dated hire, the job title displays the job posting title until the hire becomes effective.
- Once a worker is terminated, all past entries revert to the job posting title.

## What do i need to do?

This feature is automatically available. We recommend that you update your training materials so that users are aware of the new Role-Based Security Audit Report.

## What happens if i do nothing?

If you choose to do nothing, you can continue to use the existing reports for security auditing.

## Configuration notes

The Role-Based Security Audit Report is available for all English speaking users. In order for security administrators who are non-English speakers to find the report, they need the Allow Mixed-Language Transactions option to be checked in their Workday Account in order to search for the Role-Based Security Audit Report.

Community link

[Role-Based Security for Transfer Credit  
\(workday.com\)](https://workday.com)

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- If you select only multiple workers, role assigners, or assignable roles from the prompts, the report will return results for the workers, role assigners, or assignable roles selected.
- If you select a combination of a worker, role assigner, and an assignable role from the prompts, the report returns results that combine the 3. If the report can't meet all three criteria, it doesn't return any results.
- In the Role Assignee column:
- If there's no job title, the column displays the job posting.
- If there's a future dated hire, the job title displays the job posting title until the hire becomes effective.
- Once a worker is terminated, all past entries revert to the job posting title.

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Community link

[Role-Based Security for Transfer Credit  
\(workday.com\)](https://workday.com)

# Workday 2024 R2 automatically available features

## After release

Role-Based Security Audit Report

Instructions

Specify a value for the Effective Moment From and Effective Moment To fields. We recommend entering a value for at least one additional field if you're running the report for a broad date range

Worker

Role Assigner

Assignable Role

Entry Moment From

MM/DD/YYYY

--:--:-- AM

Entry Moment To

MM/DD/YYYY

--:--:-- AM

Effective Moment From

\* 04/06/2024

02:39:43 PM

Effective Moment To

\* 05/06/2024

02:39:43 PM

Include Inactive Organizations

☐

Include Transactions with No Assignable Role

☐

Cancel

OK

# Workday 2024 R2 automatically available features

## After release

Role-Based Security Audit Report

958

191

Effective Moment From

04/06/2024 01:22:01.388 PM

Include Inactive Organizations

No

Effective Moment To

05/06/2024 01:22:01.388 PM

Include Transactions with No Assignable Role

No

This report shows role-based security access. It identifies when Workers have access granted or revoked and for what reason. It shows security impact of Hire, Job Change and Termination staffing transactions

This Report won't return historical log entry results for dates earlier than 19th May 2024 or your latest tenant refresh. Workday recommend using Security History and Security History for User Reports for security impact of role assignments, user-based security and older log entry results.

Role-Based Security Audit Report

5 items

Entry Moment	Effective as of	Security Effective as of	Time Zone	Security Change Reason	Security Change Reason Details	Security Outcome	Assignable Role	Security Groups	Role Assigner
05/03/2024 02:28:22.302 PM	05/04/2024 03:00:00.000 AM	05/04/2024 03:00:00.000 AM	GMT-05:00 Eastern Time (New York)	Termination	Terminate Employee	Security Revoked	Recruiter	Recruiter (Unconstrained)	EMEA Organiz
05/03/2024 02:27:18.630 PM	05/03/2024 03:00:00.000 AM	05/03/2024 02:27:18.630 PM	GMT-05:00 Eastern Time (New York)	Hire	Hire Employee	Security Granted	Recruiter	Recruiter (Unconstrained)	EMEA Organiz
05/03/2024 01:55:56.538 PM	05/03/2024 03:00:00.000 AM	05/03/2024 01:55:56.538 PM	GMT-05:00 Eastern Time (New York)	Hire	Add Additional Job	Security Granted	Manager	Manager (Unconstrained) Primary Manager	EMEA Organiz
05/03/2024 01:48:50.887 PM	05/03/2024 03:00:00.000 AM	05/03/2024 01:48:50.887 PM	GMT-05:00 Eastern Time (New York)	Hire	Hire Employee	Security Granted	Succession Partner	Succession Partner	EMEA Organiz
05/03/2024	05/03/2024		GMT-05:00 Eastern Time (New York)	Hire	Hire Employee	No Security Impact	Recruitment Coordinator		EMEA Organiz



# Workday 2024 R2 automatically available features

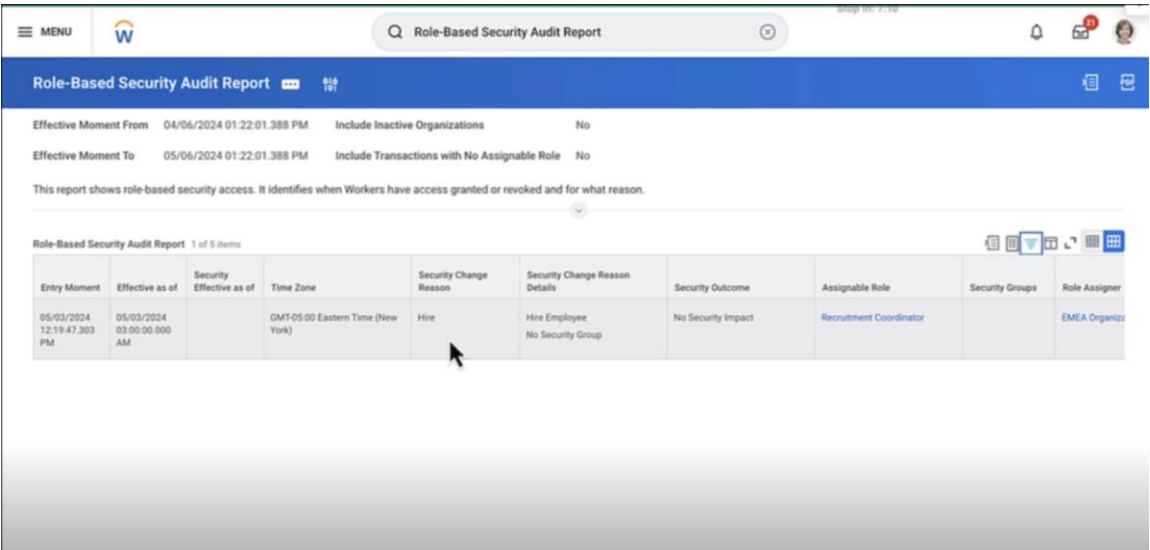
## After release

The screenshot shows the 'Role-Based Security Audit Report' interface in Workday. The report is titled 'Role-Based Security Audit Report' and includes filters for 'Effective Moment From' (04/06/2024 01:22:01.388 PM) and 'Effective Moment To' (05/06/2024 01:22:01.388 PM). The report includes a table with columns: Entry Moment, Effective as of, Security Effective as of, Time Zone, Assignable Role, Security Groups, and Role Assigner. An 'Add Filter' dialog box is open, showing a list of columns to filter by: Entry Moment, Effective as of, Security Effective as of, Time Zone, Security Change Reason, Security Change Reason Details, Security Outcome, Assignable Role, Security Groups, and Role Assigner. The 'Security Groups' column is highlighted in the dialog box.

Entry Moment	Effective as of	Security Effective as of	Time Zone	Assignable Role	Security Groups	Role Assigner
05/03/2024 02:28:22.302 PM	05/04/2024 03:00:00.000 AM	05/04/2024 03:00:00.000 AM	GMT-05:00 Eastern Time (New York)	Recruiter	Recruiter (Unconstrained)	EMEA Organi
05/03/2024 02:27:18.630 PM	05/03/2024 03:00:00.000 AM	05/03/2024 02:27:18.630 PM	GMT-05:00 Eastern Time (New York)	Recruiter	Recruiter (Unconstrained)	EMEA Organi
05/03/2024 01:55:56.538 PM	05/03/2024 03:00:00.000 AM	05/03/2024 01:55:56.538 PM	GMT-05:00 Eastern Time (New York)	Manager	Manager (Unconstrained)	EMEA Organi
05/03/2024 01:55:56.538 PM	05/03/2024 03:00:00.000 AM	05/03/2024 01:55:56.538 PM	GMT-05:00 Eastern Time (New York)	Succession Partner	Succession Partner	EMEA Organi
05/03/2024 01:55:56.538 PM	05/03/2024 03:00:00.000 AM	05/03/2024 01:55:56.538 PM	GMT-05:00 Eastern Time (New York)	Recruitment Coordinator	Recruitment Coordinator	EMEA Organi

# Workday 2024 R2 automatically available features

## After release



The screenshot displays the 'Role-Based Security Audit Report' interface in Workday. At the top, there is a navigation bar with a 'MENU' icon, the Workday logo, a search bar containing 'Role-Based Security Audit Report', and user profile information. Below the navigation bar, the report title 'Role-Based Security Audit Report' is shown with a filter icon. The main content area includes filter settings for 'Effective Moment From' (04/06/2024 01:22:01.388 PM), 'Effective Moment To' (05/06/2024 01:22:01.388 PM), 'Include Inactive Organizations' (No), and 'Include Transactions with No Assignable Role' (No). A descriptive text states: 'This report shows role-based security access. It identifies when Workers have access granted or revoked and for what reason.' Below this, a table titled 'Role-Based Security Audit Report 1 of 5 items' displays the audit data. The table has columns for Entry Moment, Effective as of, Security Effective as of, Time Zone, Security Change Reason, Security Change Reason Details, Security Outcome, Assignable Role, Security Groups, and Role Assigner. A single data row is visible, showing a hire event on 05/03/2024 at 12:19:47.303 PM, effective as of 05/03/2024 at 03:00:00.000 AM, in GMT-05:00 Eastern Time (New York), with the reason 'Hire' and details 'Hire Employee No Security Group'. The security outcome is 'No Security Impact', the assignable role is 'Recruitment Coordinator', and the role assigner is 'EMEA Organiz'. A mouse cursor is pointing at the 'Security Change Reason' cell.

Entry Moment	Effective as of	Security Effective as of	Time Zone	Security Change Reason	Security Change Reason Details	Security Outcome	Assignable Role	Security Groups	Role Assigner
05/03/2024 12:19:47.303 PM	05/03/2024 03:00:00.000 AM		GMT-05:00 Eastern Time (New York)	Hire	Hire Employee No Security Group	No Security Impact	Recruitment Coordinator		EMEA Organiz

# Workday 2024 R2 automatically available features

Prior to 2024 R2	Post 2024 R2	Impact
<p>Domains:</p> <ul style="list-style-type: none"><li>• Customer Central Security Administration</li><li>• Public Reporting Items</li><li>• Security Administration</li><li>• Worker Data: Public Worker Reports</li></ul> <p>Report Fields:</p> <ul style="list-style-type: none"><li>• Effective as of</li><li>• Entry Moment</li><li>• Time Zone</li></ul>	<p>Report:</p> <ul style="list-style-type: none"><li>• Role-Based Security Audit report data source (RDS)</li></ul> <p>Report Fields:</p> <ul style="list-style-type: none"><li>• Assignable Role</li><li>• Completed By</li><li>• Initiator</li><li>• Processed Transaction</li><li>• Role Assignee</li><li>• Role Assigner</li><li>• Security Change Reason</li><li>• Security Change Reason Details</li><li>• Security Effective as of</li><li>• Security Groups</li><li>• Security Outcome</li><li>• Transaction</li><li>• Worker</li></ul>	<div>Y/N: No impact</div> <div>Impact description:</div>

Effort

Additional description if applicable

Defect link

Not applicable

Community link

[Role-Based Security Reporting | Workday Community](#)

# Security domains for transfer credit

## What's changing

We reorganize the security domain structure for some transfer credit domains and tasks for consistency.

## Additional considerations

### Business Benefits

These changes enable you to configure security access separately for users to:

- Set up transfer credit rules.
- Manage transfer credits for students.

### Changes

#### Security Domains

For consistency with existing Workday domains, we rename the Manage: Transfer Credit Rules domain to Set Up: Transfer Credit Rules.

## What do i need to do?

This feature is automatically available. We recommend that you:

- Review your domain security policies as a result of these changes.
- Update your training materials so that users are aware of the changes.

## What happens if i do nothing?

This feature will be automatically available in Production with Workday Release 24R2.

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Security domains for transfer credit

## What's changing

We reorganize the security domain structure for some transfer credit domains and tasks for consistency.

## Additional considerations

- Create Transfer Credit Reason
- Create Transfer Credit Rule
- Delete Education Test Transfer Credit Rule
- Delete Educational Institution Transfer Credit Rule
- Edit Education Test Transfer Credit Rule
- Edit Educational Institution Transfer Credit Rule
- Edit Transfer Credit Reason
- View Education Test Transfer Credit Rule
- View Educational Institution Transfer Credit Rule
- View Transfer Credit Reason

## What do i need to do?

This feature is automatically available. We recommend that you:

- Review your domain security policies as a result of these changes.
- Update your training materials so that users are aware of the changes.

## What happens if i do nothing?

This feature will be automatically available in Production with Workday Release 24R2.

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Security domains for transfer credit

## What's changing

We reorganize the security domain structure for some transfer credit domains and tasks for consistency.

## Additional considerations

### Web Services

- We remove these web services from the Manage: Student Transfer Credit domain:
- Get Unit Type Conversion Policies
- Put Unit Type Conversion Policies
- These web services continue to be secured to the Set Up: Transfer Credit domain.

We secure these web services to the Set Up: Transfer Credit Rules domain instead of Manage: Student Transfer Credit:

- Get Transfer Credit Reasons
- Put Transfer Credit Reason

## What do i need to do?

This feature is automatically available. We recommend that you:

- Review your domain security policies as a result of these changes.
- Update your training materials so that users are aware of the changes.

## What happens if i do nothing?

This feature will be automatically available in Production with Workday Release 24R2.

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Security domains for transfer credit

## What's changing

We reorganize the security domain structure for some transfer credit domains and tasks for consistency.

## Additional considerations

### Deployment considerations

Review customer security requirements for creating transfer credit rules and managing transfer credit for students.

You may need to modify permissions on the security policies for these domains:

- Manage: Create Transfer Credit Rules and Evaluate Student Transfer Credit
- Set Up: Transfer Credit Rules (renamed)

The security policies on these domains are independent and no longer inherit from the Manage: Student Transfer Credit domain.

## What do i need to do?

This feature is automatically available. We recommend that you:

- Review your domain security policies as a result of these changes.
- Update your training materials so that users are aware of the changes.

## What happens if i do nothing?

This feature will be automatically available in Production with Workday Release 24R2.

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Workday 2024 R2 automatically available features

Prior to 2024 R2	Post 2024 R2	Impact
	These changes enable you to configure security access separately for users to: Set up transfer credit rules. Manage transfer credits for students.	<div>Y/N:</div> No impact  <div>Impact description:</div>

Effort

Additional description if applicable

Defect link

Not applicable

Community link

[Security Domains for Transfer Credit \(workday.com\)](#)



# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

### Business benefits

This enhancement provides users with a more consistent experience when securing Personal Information items, and prevents unintended access to data.

### Changes

**Custom ID report field:** We add more granular security to the Custom ID report field by removing it from the Public Reporting Items domain and adding it to these domains:

- Audit: Student Data
- Person Data: ID Information
- Person Data: Other IDs

## What do i need to do?

This feature will be automatically available in Production with Workday Release 24R2.

## What happens if i do nothing?

This feature will be automatically available in Production with Workday Release 24R2.

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

- Pre-Hire Personal Data: ID Information
- Self-Service: ID Information
- Self-Service: Other IDs
- Worker Data: Beneficiary Other IDs
- Worker Data: Current Staffing Information

**Government ID report field:** We add more granular security to the Government ID report field by removing it from the Public Reporting Items domain and adding it to these domains:

- Audit: Student Data
- Candidate Data: National and Government IDs
- Manage: Supervisory Organization

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

- Person Data: Government IDs
- Person Data: ID Information
- Self-Service: Government IDs
- Self-Service: ID Information
- Worker Data: Beneficiary Government IDs
- Worker Data: Dependent Government IDs

**ID report fields:** We add more granular security to these ID report fields:

- ID Added
- ID Changed
- ID Removed

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

We remove them from the Public Reporting Items domain and add them to these domains:

- Audit: Student Data
- Audits: Workday Support
- Candidate Data: National and Government IDs
- Former Worker Storage
- Manage: Student Application Entry State
- Manage: Supervisory Organization
- Person Data: Government IDs
- Person Data: ID Information
- Person Data: Licenses

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

- Person Data: Other IDs
- Person Data: Passports and Visas
- Pre-Hire Personal Data: ID Information
- Process: Payroll Settlement
- Reports: Pay Calculation Results for Worker (Payslips)
- REST API Public
- Self-Service: Beneficiary SSN Reporting
- Self-Service: Dependent SSN Reporting
- Self-Service: Government IDs
- Self-Service: I-9 Forms
- Self-Service: ID Information

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

- Self-Service: Licenses
- Self-Service: Other IDs
- Self-Service: Passports and Visas
- Worker Data: Beneficiary Government IDs
- Worker Data: Beneficiary National IDs
- Worker Data: Beneficiary Other IDs
- Worker Data: Beneficiary SSN Reporting
- Worker Data: Current Staffing Information
- Worker Data: Dependent Government IDs
- Worker Data: Dependent National IDs
- Worker Data: Dependent SSN Reporting

Community link

[Security Domains for Transfer Credit](#)  
([workday.com](https://workday.com))

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

- Worker Data: I-9 Forms

**National ID report fields:** Workday adds more granular security to these National ID report fields:

- National ID Formatted
- National ID in Display Format
- National ID Obscured
- National ID Unformatted

We remove them from the Public Reporting Items domain and add them to these domains:

- Audit: Student Data

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

- Audits: Workday Support
- Candidate Data: National and Government IDs
- Former Worker Storage
- Manage: Student Application Entry State
- Person Data: Government IDs
- Person Data: ID Information
- Pre-Hire Personal Data: ID Information
- Process: Payroll Settlement
- Reports: Pay Calculation Results for Worker (Payslips)
- Self-Service: Beneficiary SSN Reporting
- Self-Service: Dependent SSN Reporting

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)



# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

- Self-Service: Government IDs
- Self-Service: ID Information
- Worker Data: Beneficiary National IDs
- Worker Data: Beneficiary SSN Reporting
- Worker Data: Dependent National IDs
- Worker Data: Dependent SSN Reporting

**ID value changed report field:** Workday adds more granular security to the ID Value Changed report field by removing it from the Public Reporting Items domain and adding it to these domains:

- Audit: Student Data
- Audits: Workday Support

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

- Candidate Data: National and Government IDs
- Former Worker Storage
- Manage: Student Application Entry State
- Manage: Supervisory Organization
- Person Data: Government IDs
- Person Data: ID Information
- Person Data: Licenses
- Person Data: Other IDs
- Person Data: Passports and Visas
- Pre-Hire Personal Data: ID Information
- Process: Payroll Settlement

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

- Reports: Pay Calculation Results for Worker (Payslips)
- REST API Public
- Self-Service: Beneficiary SSN Reporting
- Self-Service: Dependent SSN Reporting
- Self-Service: Government IDs
- Self-Service: I-9 Forms
- Self-Service: ID Information
- Self-Service: Licenses
- Self-Service: Other IDs
- Self-Service: Passports and Visas
- Worker Data: Beneficiary Government IDs

Community link

[Security Domains for Transfer Credit](#)  
([workday.com](https://workday.com))

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

- Worker Data: Beneficiary National IDs
- Worker Data: Beneficiary Other IDs
- Worker Data: Beneficiary SSN Reporting
- Worker Data: Current Staffing Information
- Worker Data: Dependent Government IDs
- Worker Data: Dependent National IDs
- Worker Data: Dependent SSN Reporting
- Worker Data: I-9 Forms

Community link

[Security Domains for Transfer Credit](#)  
[\(workday.com\)](#)

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

**License number report field:** Workday adds more granular security to the License Number report field by removing it from the Public Reporting Items domain and adding it to these domains:

- Audit: Student Data
- Person Data: ID Information
- Person Data: Licenses
- Self-Service: ID Information
- Self-Service: Licenses

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

**Form I-9 section name report field:** Workday adds more granular security to the Form I-9 Section Name report field by removing it from the Public Reporting Items domain and adding it to these domains:

- Audit: Student Data
- Audits: Workday Support
- Candidate Data: National and Government IDs
- Former Worker Storage
- Manage: Student Application Entry State
- Manage: Supervisory Organization
- Person Data: Government IDs
- Person Data: ID Information
- Person Data: Licenses

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

- Person Data: Other IDs
- Person Data: Passports and Visas
- Pre-Hire Personal Data: ID Information
- Process: Payroll Settlement
- Reports: Pay Calculation Results for Worker (Payslips)
- REST API Public
- Self-Service: Beneficiary SSN Reporting
- Self-Service: Dependent SSN Reporting
- Self-Service: Government IDs
- Self-Service: I-9 Forms
- Self-Service: ID Information

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

- Self-Service: Licenses
- Self-Service: Other IDs
- Self-Service: Passports and Visas
- Worker Data: Beneficiary Government IDs
- Worker Data: Beneficiary National IDs
- Worker Data: Beneficiary Other IDs
- Worker Data: Beneficiary SSN Reporting
- Worker Data: Current Staffing Information
- Worker Data: Dependent Government IDs
- Worker Data: Dependent National IDs
- Worker Data: Dependent SSN Reporting

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)



# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

- Worker Data: I-9 Forms

**Global identifier report field:** Workday adds more granular security to the Global Identifier report field by removing it from the Public Reporting Items domain and adding it to these domains:

- Audit: Student Data
- Audits: Workday Support
- Candidate Data: National and Government IDs
- Former Worker Storage
- Manage: Student Application Entry State
- Manage: Supervisory Organization
- Person Data: Government IDs

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

- Person Data: ID Information
- Person Data: Licenses
- Person Data: Other IDs
- Person Data: Passports and Visas
- Pre-Hire Personal Data: ID Information
- Process: Payroll Settlement
- Reports: Pay Calculation Results for Worker (Payslips)
- REST API Public
- Self-Service: Beneficiary SSN Reporting
- Self-Service: Dependent SSN Reporting
- Self-Service: Government IDs

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

- Self-Service: I-9 Forms
- Self-Service: ID Information
- Self-Service: Licenses
- Self-Service: Other IDs
- Self-Service: Passports and Visas
- Worker Data: Beneficiary Government IDs
- Worker Data: Beneficiary National IDs
- Worker Data: Beneficiary Other IDs
- Worker Data: Beneficiary SSN Reporting
- Worker Data: Current Staffing Information
- Worker Data: Dependent Government IDs

Community link

[Security Domains for Transfer Credit](#)  
([workday.com](https://workday.com))

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

- Worker Data: Dependent National IDs
- Worker Data: Dependent SSN Reporting
- Worker Data: I-9 Forms

**Masked identification # (Public REST) report field:** Workday adds more granular security to the Masked Identification # (Public REST) report field by removing it from the Public Reporting Items domain and adding it to the REST API Public domain.

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](#)

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

**Visa identification number report field:** Workday adds more granular security to the Visa Identification Number report field by removing it from the Public Reporting Items domain and adding it to these domains:

- Audit: Student Data
- Person Data: ID Information
- Person Data: Passports and Visas
- Self-Service: ID Information
- Self-Service: Passports and Visas
- Worker Data: Dependent Government IDs

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](https://workday.com)

# Security for personal information items

## What's changing

Workday enhances security on Personal Information prompts, report fields, and tasks. The feature will be Automatically Available in Production with Workday Release 24R2.

## Additional considerations

**Pre-Hire prompt on tasks:** Workday adds contextual security on the Pre-hire prompt for these tasks :

- Edit ID Information for Pre-Hire
- Edit Pre-Hire Contact Information
- Pre-Hire Contact Information
- Pre-Hire ID Information
- Pre-Hire Names

Community link

[Security Domains for Transfer Credit  
\(workday.com\)](#)

# Workday 2024 R2 automatically available features

Prior to 2024 R2	Post 2024 R2	Impact
	This enhancement provides users with a more consistent experience when securing Personal Information items, and prevents unintended access to data.	<div>Y/N:</div> No impact <div>Impact description:</div>

Effort

Additional description if applicable

Defect link

Not applicable

Community link

[Security for Personal Information Items \(workday.com\)](#)

# Security for personal information items

## What's changing

We update the security for the **Worker ID (REST)** and **Employee ID** report fields.

## Additional considerations

### Business benefits

This feature provides you with more granularity and consistency when configuring which users have access to view an ID for a worker.

### Changes

We now secure the **Worker ID (REST)** and **Employee ID** report fields to these domains instead of the Public Reporting Items domain:

- Global Payroll System
- Reports: Learning Record
- Self-Service: Current Staffing Information
- Self-Service: Payroll (My Payslips)
- Self-Service: Payroll (My Withholding Elections) - CAN

## What do i need to do?

Make sure that users who use the **Worker ID (REST)** and **Employee ID** report fields are secured to one of these domains in order to maintain access to the report fields:

- Global Payroll System
- Reports: Learning Record
- Self-Service: Current Staffing Information
- Self-Service: Payroll (My Payslips)
- Self-Service: Payroll (My Withholding Elections) - CAN
- Worker Data: Current Staffing Information
- Worker Data: Payroll (Company Specific)
- Worker Data: Worker ID

Community link

[Security for Worker ID \(REST\) and Employee ID Report Fields \(workday.com\)](#)



# Security for personal information items

## What's changing

We update the security for the **Worker ID (REST)** and **Employee ID** report fields.

## Additional considerations

- Worker Data: Current Staffing Information
- Worker Data: Payroll (Company Specific)
- Worker Data: Worker ID

This enables members of a security group with access to one of those domains to view the ID for a worker, such as on:

A custom report.

A worksheet for the Change Business Title and Move Workers (Supervisory) business processes.

Global Search

## What do i need to do?

The security for the report fields is automatically updated. Users who used to have access the report fields might no longer be able to view them.

Community link

[Security for Worker ID \(REST\) and Employee ID Report Fields \(workday.com\)](#)

# Workday 2024 R2 automatically available features

Prior to 2024 R2	Post 2024 R2	Impact
The Worker ID (REST) and Employee ID report fields are secured to the Public Reporting Items	<p>We now secure the Worker ID (REST) and Employee ID report fields to these domains instead of the Public Reporting Items domain:</p> <ul style="list-style-type: none"><li>• Global Payroll System</li><li>• Reports: Learning Record</li><li>• Self-Service: Current Staffing Information</li><li>• Self-Service: Payroll (My Payslips)</li><li>• Self-Service: Payroll (My Withholding Elections) - CAN</li><li>• Worker Data: Current Staffing Information</li><li>• Worker Data: Payroll (Company Specific)</li><li>• Worker Data: Worker ID</li></ul>	<div>Y/N: No impact</div> <div>Impact description:</div>

Effort

Additional description if applicable

Defect link

Not applicable

Community link

[Security for Worker ID \(REST\) and Employee ID Report Fields \(workday.com\)](#)

# Security for personal information items

## What's changing

With this release, we enable greater access to the Supplier Contract Lines report data source for security groups.

## Additional considerations

### Business benefits

We provide easier access to reporting for your organization.

### Changes

We update the Supplier Contract Lines data source filter to evaluate security for these security groups:

- Intersection
- Supplier Contract Specialist for Supplier Contract
- Unconstrained

## What do i need to do?

No setup needed.

## What happens if i do nothing?

This will be automatically available from your tenant.

## Delivery details

Preview Date: 2024-08-17

Production Date: 2024-09-21

Service Update Date: 2024-08-17

Community link

[Unsupported Security Group Access to Supplier Contract Reporting Data Sources \(workday.com\)](#)

# Security for personal information items

## What's changing

With this release, we enable greater access to the Supplier Contract Lines report data source for security groups.

## Additional considerations

For Intersection security group users, Workday now only displays contract lines that meet all dimensions of the security group on custom reports.

Supplier Contract Specialist for Supplier Contract security group users can now view contract lines on custom reports, but not amendment or history lines.

Unconstrained security group users can now view entire custom reports.

We also update the **Organizations** prompt on custom reports to display only relevant values to the respective security groups.

We deliver a new Supplier Contract State Line Type report field on the Supplier Contract Line (secured to the Public Reporting Items domain) that you can use in custom reports on the status of supplier contract lines.

## What do i need to do?

No setup needed.

## What happens if i do nothing?

This will be automatically available from your tenant.

## Delivery details

Preview Date: 2024-08-17

Production Date: 2024-09-21

Service Update Date: 2024-08-17

Community link

[Unsupported Security Group Access to Supplier Contract Reporting Data Sources \(workday.com\)](#)

# Workday 2024 R2 automatically available features

Prior to 2024 R2	Post 2024 R2	Impact
	<p>For Intersection security group users, Workday now only displays contract lines that meet all dimensions of the security group on custom reports.</p> <p>Supplier Contract Specialist for Supplier Contract security group users can now view contract lines on custom reports, but not amendment or history lines.</p> <p>Unconstrained security group users can now view entire custom reports.</p> <p>We also update the <b>Organizations</b> prompt on custom reports to display only relevant values to the respective security groups.</p> <p>We deliver a new Supplier Contract State Line Type report field on the Supplier Contract Line (secured to the Public Reporting Items domain) that you can use in custom reports on the status of supplier contract lines.</p>	<div>Y/N: No impact</div> <div>Impact description:</div>

Effort

Additional description if applicable

Defect link

Not applicable

Community link

[Worksheets Expanded Sharing Options for Security \(workday.com\)](#)

# Workday 2024 R2 automatically available features

Before Release

Share

ShareWho Has AccessAdvanced

Share with Individuals

Enter name

Can Edit

Link Sharing Off

Close

Convert to Template

Share

ShareWho Has AccessAdvanced

Advanced Settings

Editors can share

Commenters and viewers can copy, download, and print

Where applicable, depending on the item type.

Close

Convert to Template

# Workday 2024 R2 automatically available features

## After Release

Share Logan's Workbook

ShareWho Has AccessAdvanced

Share with Individuals

Enter name

Can Edit

Share with Groups

Enter group name

Can Edit

Link Sharing Off

Share Logan's Workbook

ShareWho Has AccessAdvanced

Advanced Settings

Who can copy?

☒ Owner Only

☐ Owner and Editors

☐ Owner, Editors, and Commenters

☐ Owner, Editors, Commenters, and Viewers

Who can download/print?

☒ Owner Only

☐ Owner and Editors

☐ Owner, Editors, and Commenters

☐ Owner, Editors, Commenters, and Viewers

Who can share?

☒ Owner Only

☐ Owner and Editors

Close

[Convert to Template](#)

# Worksheets expanded sharing options for security

## What's changing

Worksheets enables more granular selections for sharing, in the workbook sharing dialog Advanced tab. Along with selecting Edit, Comment, and View permissions, you can now choose individual options for the Share, Copy, and Download/Print actions.

## Additional considerations

### Business benefits

Worksheets dramatically improves workbook security by offering differentiated sharing options in the workbook sharing dialog, providing enhanced control over recipients' actions and access within the workbook.

### Changes

The Advanced tab in the sharing dialog now includes individual settings for each permission level:

- Edit: Provides Share, Copy, and Download/Print options.
- Comment: Provides Copy and Download/Print options.
- View: Provides Copy and Download/Print options.

These default workbook options are changing:

- Only the owner can share, copy, and download/print workbooks.
- If the workbook owner shares a workbook with Comment or View permission, recipients will no longer be able to copy, download, or print the workbook.

## What do i need to do?

The new enhanced sharing option feature is available automatically. No action is needed.

When sharing a workbook, select the **Advanced** tab to choose specific actions that you want to enable for the permission level you're selecting.

## What happens if i do nothing?

- Existing shared workbooks continue to have the permissions that were assigned before the feature was released. When you view the sharing permissions, you can adjust the settings using the new options.
- For new workbooks, the workbook sharing default options are changing:
- Only the owner can share, copy, and download/print workbooks.
- If the workbook owner shares a workbook with Comment or View permission, recipients will no longer be able to copy, download, or print the workbook by default.

Community link

[Unsupported Security Group Access to Supplier Contract Reporting Data Sources \(workday.com\)](#)



# Workday 2024 R2 automatically available features

Before Release

Share

Who Has Access

Advanced

Share with Individuals

Enter name

Can Edit

Link Sharing Off

Close

Convert to Template

Share

Who Has Access

Advanced

Advanced Settings

Editors can share

Commenters and viewers can copy, download, and print  
Where applicable, depending on the item type.

Close

Convert to Template

73

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# Workday 2024 R2 automatically available features

## After Release

Share Logan's Workbook

ShareWho Has AccessAdvanced

Share with Individuals

Enter name

Can Edit

Share with Groups

Enter group name

Can Edit

Link Sharing Off

Share Logan's Workbook

ShareWho Has AccessAdvanced

Advanced Settings

Who can copy?

☒ Owner Only

☐ Owner and Editors

☐ Owner, Editors, and Commenters

☐ Owner, Editors, Commenters, and Viewers

Who can download/print?

☒ Owner Only

☐ Owner and Editors

☐ Owner, Editors, and Commenters

☐ Owner, Editors, Commenters, and Viewers

Who can share?

☒ Owner Only

☐ Owner and Editors

Close

[Convert to Template](#)

# Workday 2024 R2 automatically available features

Prior to 2024 R2	Post 2024 R2	Impact
<p>The Advanced settings only have the following items:</p> <ul style="list-style-type: none"><li>• Editors can share</li><li>• Commenters and viewers can copy, download, and print.</li></ul> <p>Where applicable, depending on the item type.</p> <p>Workbook can only be shared to individuals.</p>	<p>The Advanced settings now have the following sections.</p> <ul style="list-style-type: none"><li>• Who can copy?</li><li>• Who can download/print?</li><li>• Who can share?</li></ul>	<p><b>Y/N:</b> No impact</p> <p><b>Impact description:</b></p> <p>May need to update your training materials.</p>

**Effort**

Additional description if applicable

**Defect link** Not applicable

**Community link** [Worksheets Expanded Sharing Options for Security \(workday.com\)](#)



# Setup required features

# Security - Add attachments security domain

## What's changing

With the 2024R2 release, Workday introduces a new security sub-domain that enables you to limit a user's actions only to adding attachments to supplier invoices and invoice adjustments and not editing or removing attachments from supplier invoices and invoice adjustments.

This feature improves security by allowing the accounts payables team only to add attachments to invoices and invoice adjustments while enabling supervisors and managers to add, delete, and change attachments to invoices and invoice adjustments.

## Additional considerations

Workday makes the following changes and additions to tasks:

- rename the Add Attachments task to Add/Change Attachments.
- provides a new task, Add Attachment, that enables you only to add, but not change or delete, an attachment.

Workday also delivers a new security domain, Process Supplier Invoice Document - Add Attachment (secured to the Supplier Accounts functional area) that you can use to limit users' ability to add attachments to supplier invoices and invoice adjustments.

## What do i need to do?

- To uptake this feature, create a security policy for the Process: Supplier Invoice Document - Add Attachment domain. Review the security groups assigned.

## What happens if i do nothing?

- If you already have access to add attachments, you continue to have remove and change access as well.
- Note: This feature doesn't enable you to add or change attachments for supplier invoice requests.

Community link

<https://doc.workday.com/release-notes/en-us/finsa/8014183.html>

# Workday 2024 release 2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
<p>These newly added domains were not available in earlier releases.</p> <p>Add Attachments tasks now renamed.</p> <p>New task Add attachment only to add documents.</p>	<ul style="list-style-type: none"><li>• We rename the Add Attachments task to Add/Change Attachments.</li><li>• We provide a new task, Add Attachment, that enables you only to add, but not change or delete, an attachment.</li><li>• new security domain, Process Supplier Invoice Document - Add Attachment (secured to the Supplier Accounts functional area) that you can use to limit users' ability to add attachments to supplier invoices and invoice adjustments.</li></ul>	<div>Y/N:</div> <div>Impact description:</div>

Effort

<Hours>

Additional description if applicable

Defect link	Not applicable
Community link	<a href="https://doc.workday.com/release-notes/en-us/finsa/8014183.html">https://doc.workday.com/release-notes/en-us/finsa/8014183.html</a>

# Workday 2024 release 2 set-up based features

## Before release

N/A

## After release

Tasks	All Functional Areas
Add Attachment (Task)	Expenses
Add/Change Attachment for Supplier Invoice Adjustment (Task)	Supplier Accounts
Add/Change Attachment for Supplier Invoice (Task)	Supplier Accounts
Add/Change Attachment for Accounting Journal (Task)	Financial Accounting
Add/Change Attachment for Accounting Adjustment (Task)	Financial Accounting
Add/Change Attachments to Stop Item (Task)	Banking and Settlement Core Payroll Customer Accounts Expenses Miscellaneous Payments More (3)
Add/Change Attachments for Ad Hoc Bank Transaction (Task)	Banking and Settlement
Add/Change Attachments for Ad Hoc Payment (Task)	Banking and Settlement
Add/Change Attachment for Miscellaneous Payment Request (Task)	Miscellaneous Payments
Add/Change Attachment for Accounting Center Detailed Journal (Task)	Accounting Center
Add/Change Attachments for Customer Deposit (Task)	Customer Accounts
Add/Change Attachment for Write-Off (Task)	Customer Accounts

# Security - Calculation engine security

## What's changing

With the 2024R2 release, Workday enable you to configure access to calculations based on:

- Category
- Academic Unit

Note: This ensures that administrators can only access calculations within their area and institution.

## Additional considerations

Workday renames the Set Up: Payroll (Calculations - Generic) security domain to Set Up: Calculations - Generic.

Workday delivers a new Calculation Segmented Setup security domain secured to these functional areas:

- Core Payroll
- Implementation
- Payroll Interface
- Time Off and Leave

## What do i need to do?

To configure segment security,

1. Create a Segment-Based Security Group, adding the relevant security groups and category segments.
2. Create an All group that contains all category segments not included in the first step.
3. Create an All Users group that excludes implementers and the security groups defined in the first step.  
Note: When you create a group such as All Users Exclude Student Users, implementers won't be included and must be added to the domain security.
4. In the Calculation Segmented Setup domain, remove the All Users group from the domain security policy.
5. Add the segment security groups that you created in step 1 and step 2.
6. Activate any pending security policy changes.

Community link

<https://doc.workday.com/release-notes/en-us/stufin/7010559.html>



# Security - Calculation engine security

## Additional considerations

This domain enables you to configure access to calculations using segment-based security groups.

When you set up segment-based security in a category, you can create, edit, and view calculations for the categories you have access to.

We add segment security to various tasks and reports for:

- Generic calculations
- Payroll

Workday also updates these web services to support segment security:

- Get Advanced Lookup Table
- Put Advanced Lookup Table
- Get External Payroll Deduction
- Put External Payroll Deduction
- Get External Payroll Earning
- Put External Payroll Earning
- Get Input Value Lookup Table
- Put Input Value Lookup Table

## What do i need to do?

Your calculations will continue to work as before.

If you don't use segmented security, you don't need to configure the Calculation Segmented Setup domain. The All Users group is used by default. This means that access to creating, editing, and viewing calculations will remain the same for all users.

Community link

<https://doc.workday.com/release-notes/en-us/stufin/7010559.html>

# Security - Calculation engine security

## Additional considerations

### Contextual security for academic units

- Constrained users can now only use calculations from academic units and categories they have access to.
- Unconstrained users, while not restricted by academic unit security, must still comply with any configured category segment security.
- Workday now contextually secures various tasks and reports in Student by academic unit and category, enabling you to only use calculations that you have access to.

### Financial Aid Calculation Category

- Workday adds a new Financial Aid option to the Category prompt on generic create calculation tasks. See attachment for complete details.
- This update enables you to create calculations related to student financial aid. We also update the Put Lookup Calculation web service to support this functionality.

Community link

<https://doc.workday.com/release-notes/en-us/stufin/7010559.html>

# Workday 2024 release 2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
Old domain: Set Up: Payroll (Calculations-Generic)	<ul style="list-style-type: none"><li>• Rename the Set Up: Payroll (Calculations - Generic) security domain to Set Up: Calculations - Generic.</li><li>• A new Calculation Segmented Setup security domain secured to Core Payroll, Implementation, Payroll Interface, Time Off and Leave Functional Areas.</li><li>• A new Financial Aid option to the <b>Category</b> prompt on generic create calculation tasks.</li></ul>	<div>Y/N:</div> <div>Impact description:</div>

Effort

<Hours>

Additional description if applicable

Defect link

Not applicable

Community link

<https://doc.workday.com/release-notes/en-us/stufin/7010559.html>

# Security - Contextual security by accounting source

## What's changing

With the 2024R2 release, Workday continues to enhance Accounting Center security by delivering contextual security by accounting source. Access to accounting sources are governed by the source system.

When you create or edit an accounting source and select a source system, Workday limits access to the accounting source based on the constrained Roles - Source System security group defined for the source system. Enables you to control which accounting sources user groups have access to.

Note: Unconstrained users will continue to have access to all accounting sources.

## Additional considerations

- Unconstrained security groups continue to have access to all accounting sources.
- You can use role-based security groups on business process approval steps to route approvals for a specific accounting source to the correct users.
- The Accounting Center domain security structure has been enhanced to support contextual security and to make access more configurable (e.g. Accounting Center Error Manager is now in its own domain). There are no changes to existing security as part of this, but please see the What's New Report in Workday for a full list of domain security changes.

## What do i need to do?

1. Use the **Edit Accounting Source** task to add the Source System attribute to an accounting source.
2. Use the **Maintain Assignable Role** task to create a new assignable role enabled for the source system.
3. Create a new constrained role-based security group with the assignable role.
4. Assign users to the new role on the source system.
5. If role-based security groups don't exist for the company, repeat steps 2 to 4 for the Company dimension.

Community link

<https://doc.workday.com/release-notes/en-us/finac/7011236.html>

# Security - Contextual security by accounting source

## Additional considerations

### Accounting Center Detailed Journals (ACDJs)

- Users must opt in to the new **Accounting Center Detailed Journals - Contextual Security by Accounting Source** feature in order to have ACDJs constrained by both company and source system.

#### If you opt-in:

- You must add the source system to the accounting sources.
- You must add users to constrained security groups for both company and source system. These security groups should be on the appropriate ACDJ domains for access.
- If users only have constrained security by company after opt-in, they won't have access to items secured by the ACDJ domains.

#### If you don't opt in:

- Existing setup will remain and ACDJs will only be constrained by company.
- You have a 12 month period to opt in to this feature. After 12 months, we will automatically enable the feature.
- Unconstrained security groups on the ACDJ domains are not affected by this opt-in.

## What do i need to do?

- For Accounting Center Detailed Journals: Access the Maintain Feature Opt-In report and for the Accounting Center Detailed Journals - Contextual Security by Accounting Source feature, select Opt In to Feature.
- Add a new role-based security group for the source system to these domains based on your security requirements. Ensure that the role-based security group for the Company exists on these domains:
  1. Process: Accounting Center Detailed Journals – Add/Change Attachment
  2. Process: Accounting Center Detailed Journals – Cancel
  3. Process: Accounting Center Detailed Journals – Core
  4. Process: Accounting Center Detailed Journals – Reporting
  5. Process: Accounting Center Detailed Journals – View

Community link

<https://doc.workday.com/release-notes/en-us/finac/7011236.html>

# Security - Contextual security by accounting source

## Additional considerations

### Accounting Center Detailed Journals (ACDJs)

- Users must opt in to the new **Accounting Center Detailed Journals - Contextual Security by Accounting Source** feature in order to have ACDJs constrained by both company and source system.

#### If you opt-in:

- You must add the source system to the accounting sources.
- You must add users to constrained security groups for both company and source system. These security groups should be on the appropriate ACDJ domains for access.
- If users only have constrained security by company after opt-in, they won't have access to items secured by the ACDJ domains.

#### If you don't opt in:

- Existing setup will remain and ACDJs will only be constrained by company.
- You have a 12 month period to opt in to this feature. After 12 months, we will automatically enable the feature.
- Unconstrained security groups on the ACDJ domains are not affected by this opt-in.

For all other Accounting Center domains:

- Add a new role-based security group to these domains based on your security requirements:
  1. Process: Accounting Center
  2. Process: Accounting Center Error Manager
  3. Set Up: Accounting Source – Maintain
  4. Set Up: Accounting Source – Inactivate
  5. Set Up: Accounting Source – Process Configuration
- (Optional) Add at least 1 of the above security groups to the security policies for these business processes:
  1. Accounting Center Summarization Event
  2. Accounting Center In-line Edit Approval Event

## What happens if i do nothing?

- There will be no immediate changes in Workday, and existing security will remain as-is.

Community link

<https://doc.workday.com/release-notes/en-us/finac/7011236.html>

# Workday 2024 release 2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
These are newly added domains which were not available in earlier releases.	<p>Below New domains are now available:-</p> <ul style="list-style-type: none"><li>• Set Up: Source Systems domain (secured to the Accounting Center functional area)</li><li>• Process: Accounting Center Error Manager domain (secured to the Accounting Center functional area)</li><li>• Process: Accounting Center Summary Journals domain (secured to the Accounting Center functional area)</li></ul> <p>Below New fields are now available:</p> <ul style="list-style-type: none"><li>• Source System field (secured to the constrained Roles - Source System security group)</li></ul>	<div>Y/N:</div> <div>Impact description:</div>

Effort

<Hours>


Additional description if applicable

Defect link	Not applicable
Community link	<a href="https://doc.workday.com/release-notes/en-us/finac/7011236.html">https://doc.workday.com/release-notes/en-us/finac/7011236.html</a>

# Workday 2024 release 2 set-up based features

## After Release




MENU



Q Search


LAVE 07/24 12:08 | INT



Stop In: 4:20



View Domain

Set Up: Accounting Source - Maintain





Domain Name

Set Up: Accounting Source - Maintain

Description

This domain provides access to users with source system or unconstrained roles to accounting source configuration tasks and related reporting.

Domain Security Policy

Q

Functional Areas

Accounting Center

Part Of Domain Groups

Accounting Center

Super Domain

Set Up: Accounting Center

Allowed Security Group Types

Roles - Source System  
Unconstrained Groups

Count of Secured Items

190

> Instance Sets

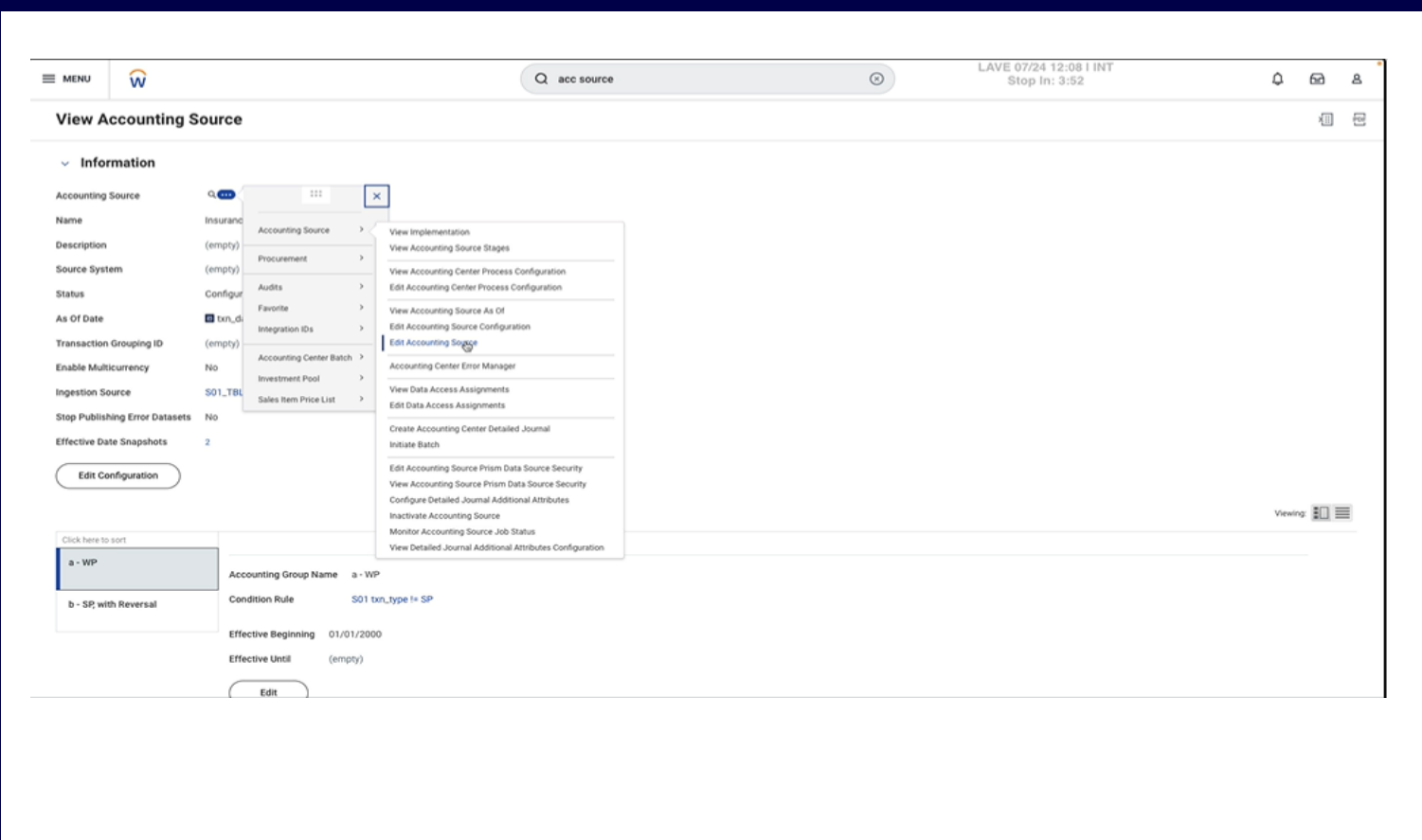
> Reports and Tasks

> Web Services



# Workday 2024 release 2 set-up based features

## After Release



# Workday 2024 release 2 set-up based features

## After Release

✕

Accounting Source

Accounting Source

Q

Name

Insurance Premiums US

Description

Source System

X: S01 [2]

Status

Configured

Ingestion Source

S01\_TBL

Data Change Task

As Of Date

X: txn\_date [2]

Transaction Grouping ID

Enable Multicurrency

☐

Stop Publishing Error Datasets

☐

Configure Ingestion Fields for Editing

Edit Configuration

OK

Cancel

# Workday 2024 release 2 set-up based features

## After Release

Maintain Assignable Roles

1 of 455 items

	Assignable Role	*Role Name	Workday Role	Enabled for	Role-Based Security Groups	Assignable Role Usages
	Q	Accounting Source Editor		× Source System	2	Usage

# Workday 2024 release 2 set-up based features

## After Release

MENU

W

acc source

View Accounting Source

010101

Information

Accounting Source

NameInsurance Premiums US

Description(empty)

Source SystemSS01

StatusConfigured

As Of Datetxn\_date

Transaction Grouping ID(empty)

Enable MulticurrencyNo

Ingestion SourceS01\_TBL

Stop Publishing Error DatasetsNo

Effective Date Snapshots2

Edit Configuration

Source System

Audits

Create Integration Work...

Favorite

Integration IDs

Maintain Source Syste...

Roles

Assign Roles

View Role Assignment Audit History

View Role Assignment History

Security History

Assign Roles SS01 010101

Assign workers to roles. Your role changes will take effect at the beginning (midnight) of the date in Pacific Time (GMT-8 or, during daylight saving time, GMT-7).

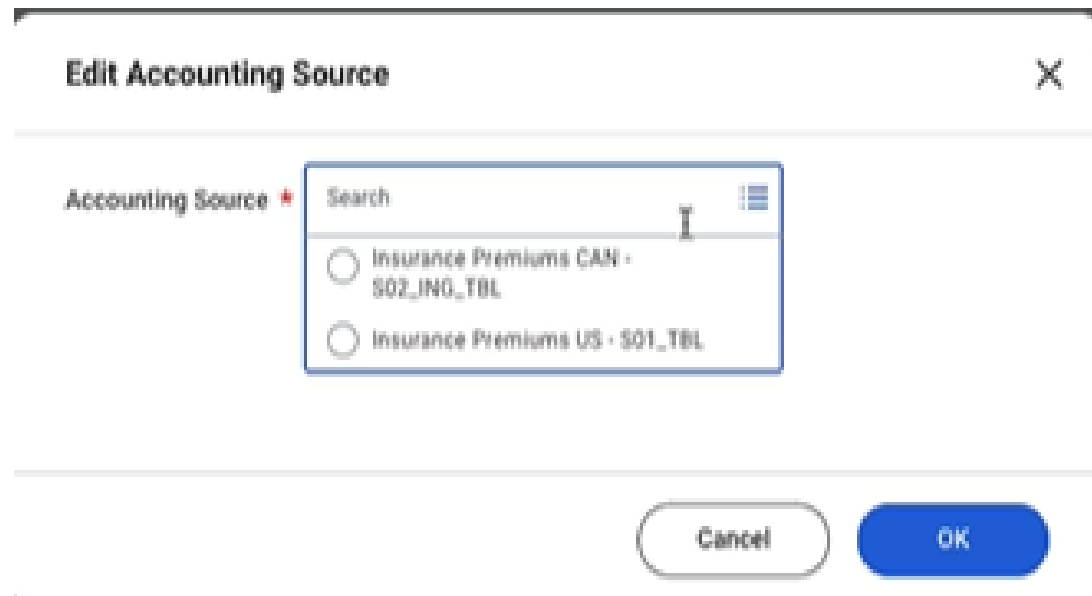
Effective Date 07/29/2024

Assign Roles 4 Items

	Role	Restricted to Single Assignment	Assigned To	Current Effective Date
+	Accounting Center Batch Manager	<input type="checkbox"/>	× P-13178 Financial Analyst - Accounting Center Batch Manager 01	07/24/2024
−	Accounting Source Administrator	<input type="checkbox"/>	× P-13174 Financial Analyst - Accounting Source Administrator 01	07/24/2024
−	Accounting Source Editor	<input type="checkbox"/>	× P-13176 Financial Analyst - Accounting Source Editor 01 × P-13178 Financial Analyst - Accounting Center Batch Manager 01 × P-13180 Financial Analyst - Accounting Source Editor 03	07/29/2024
−	Accounting Source Error Manager	<input type="checkbox"/>	× P-13172 Financial Analyst - Accounting Center Error Manager 01	07/24/2024

# Workday 2024 release 2 set-up based features

## After Release



**Edit Accounting Source**

Accounting Source \*

Search

- ☐ Insurance Premiums CAN - S02\_ING\_TBL
- ☐ Insurance Premiums US - S01\_TBL

Cancel OK

### As unconstrained user

- Access to all accounting sources



**View Accounting Source**

Accounting Source \*

Search

- ☐ Insurance Premiums US - S01\_TBL

Cancel OK

### As constrained user

- Access only to accounting sources that they support

# Security - Payroll country segmented security

## What's changing

With the 2024R2 release, Workday introduces Workday adds a new security domain that enables you to ensure users can select specific countries on certain payroll tasks.

This enhances security by restricting access to certain countries based on user roles.

Note:

## Additional considerations

Workday delivers a new Payroll Country Segmented Setup domain (secured to the Core Payroll, Implementation, and Payroll Interface functional areas) that enables you to create segment-based security groups by country.

Workday adds this security to the Country field on these domains:

- Pay Cycle Command Center domain
- Payroll Settlements domain
- Report Execution domain
- Reports: Pay Calculation Results for Pay Group (Results) domain

## What do i need to do?

To enable this feature, you must create segment-based security groups and give those groups access to the Payroll Country Segmented Setup domain.

- From the **Type of Tenanted Security Group** field, select Segment-Based Security Group.
- From the **Access to Segments** field, select Security Segments (Workday Owned) > Payroll Country Security Segment (Workday Owned).

When you edit the permissions on the Payroll Country Segmented Setup domain, Workday recommends removing the All Users group and adding both the segment-based security groups that you create and the Implementers group to these grids:

Community link

<https://doc.workday.com/release-notes/en-us/paywdarch/8031079.html>

# Security - Payroll country segmented security

## Additional considerations

- Set Up: Payroll
- Set Up: Payroll – FRA domain
- Set Up: Payroll (Calculations - Payroll Specific) domain:
- Set Up: Payroll (Flexible Payments and Deduction Options)
- Set Up: Payroll (Model My Pay)
- Set Up: Payroll (Payroll Input Workbooks)
- Set Up: Payroll (Prism PROVE)
- Set Up: Payroll (Reporting)
- Set Up: Payroll (Taxes View)

- Report/Task Permissions
- Integration Permissions

## What happens if I do nothing?

- Users with Editable Sheet Access or the Version permission can use the scenario feature.
- The Download Scenario Changes option won't display for any user.

Community link

<https://doc.workday.com/release-notes/en-us/paywdarch/8031079.html>

# Workday 2024 release 2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
These are newly added domains which were not available in earlier releases.	New Payroll Country Segmented Setup domain (secured to the Core Payroll, Implementation, and Payroll Interface functional areas)	<div>Y/N:</div> <div>Impact description:</div>

Effort

<Hours>

Additional description if applicable

Defect link

Not applicable

Community link

<https://doc.workday.com/release-notes/en-us/paywdarch/8031079.html>



# Security - Rule-based security framework

## What's changing

With the 2024R2 release, Workday enables you to create conditional security rules that limit users in specific roles from accessing job openings.

This provides an alternative to existing, complex methods of restricting instance access, such as security intersections or exclusions.

Note: These enhancements are currently limited to recruiting-specific use cases. In future releases, we plan to broaden this functionality to other areas.

## Additional considerations

Workday adds a new Exclude Access to Instances by Rule option, for the creation of rule-based security groups using the **Create Security Group** task (secured to the Security Configuration domain). Once you configure a security rule, you can then add that rule and a baseline role-based security group to a rule-based security group.

You can also use the **Test Security Rule** report (secured to the Set Up: Security Rules domain) to verify that a security rule works as intended for the target user and job application instance.

## What do i need to do?

Since these updates are currently limited to recruiting, we recommend configuring recruiters' access to Workday before creating any security rules. To limit recruiters' ability to view and modify a job application instance, a recruiter must be:

- Assigned to a rule-based security group related to recruiting, including primary, location hierarchy, or supervisory recruiters.
- An applicant to a job request in which they are assigned a role.

## What happens if i do nothing?

- You won't experience any changes.

Community link

<https://doc.workday.com/release-notes/en-us/paywdarch/8031079.html>

# Workday 2024 release 2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
The Exclude Access to Instances by Rule option is not available.	A new Exclude Access to Instances by Rule option, for the creation of rule-based security groups using the Create Security Group task	<div>Y/N:</div> <div>Impact description:</div>

Effort

<Hours>

Additional description if applicable

Defect link

Not applicable

Community link

<https://doc.workday.com/release-notes/en-us/configsec/7937813.html>

# Workday 2024 release 2 set-up based features

## Before release

N/A

## After release

Edit Rule-Based Security GroupSecurity - Rule-Based Security Framework

Instructions

Select a security group as a baseline security group whose members you want to constrain using a security rule. You can use these sections to constrain access on the baseline security group:  
  
\* Membership: Specify users who can or can't access a securable item with a Membership security rule.  
\* Access to Instances: Specify instances that a user can or can't access with an Access Constraint security rule.  
  
When you don't have access to report fields on a rule, you can use the rule in the rule-based security group, but you can't view the details of the rule.

Name

Security - Rule-Based Security Framework

Comment

Inactive

☐

Baseline Security Group \*

Membership

☐ Use Membership from Baseline Security Group

☐ Include Members by Rule

☐ Exclude Members by Rule

Access to Instances

☐ Use Access to Instances from Baseline

☐ Include Access to Instances by Rule

☒ Exclude Access to Instances by Rule

Access Constraint Rules

Create Security Rule

Search

OK

Cancel

# Security - Security for student workers

## What's changing

With the 2024R2 release, You can now prevent student workers from approving their own registration withdraw and instructor eligibility business process events.

This provides your institution with additional security configuration options, enabling students to act according to the policies set by your institution.

Note:

## Additional considerations

You can now prevent student workers from completing the Approval step on these business processes when it's for them:

- Designate Instructor Eligibility subprocess events related to instructor eligibility (secured to the Student Records functional area)
- Registration Withdraw Event (secured to the Student Records functional area)

## What do i need to do?

To enable this functionality for either the Registration Withdraw Event business process or the Designate Instructor Eligibility subprocess:

1. Select **Business Process > Maintain Advanced Routing** from the related actions menu of the approval step of the business process.
2. Select **Exclude Event Subject**. question in which they are assigned a role.

## What happens if i do nothing?

Student workers can continue to complete the Approval step on these business processes when it's for them:

- Designate Instructor Eligibility subprocess events related to instructor eligibility (secured to the Student Records functional area)
- Registration Withdraw Event (secured to the Student Records functional area)

Community link

<https://doc.workday.com/release-notes/en-us/stucurr/7792566.html#Impact-tab>

# Workday 2024 release 2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
	<ul style="list-style-type: none"><li>• Designate Instructor Eligibility subprocess events related to instructor eligibility</li><li>• Registration Withdraw Event (secured to the Student Records functional area)</li></ul>	<div>Y/N:</div> <div>Impact description:</div>

Effort

<Hours>

Additional description if applicable

Defect link

Not applicable

Community link

<https://doc.workday.com/release-notes/en-us/stucurr/7792566.html#Impact-tab>

# Security - Segmented security for non-funded plans

## What's changing

With the 2024R1 release, Workday makes it easier to secure non-funded compensation plans.

You can now enable segmented security to restrict access to specific non-funded compensation plan assignments to specific security groups.

Note:

## Additional considerations

Workday delivers these new Security domains:

### Non-Funded Security Domains

- Worker Data: Non-Funded Plan Assignments
- Self Service: Non-Funded Plan Assignments

Workday 2024R2 enables segmented security for these compensation plan assignments:

- Allowance Plans
- Calculated Plans
- Commission Plans
- Hourly Plans
- Period Salary Plans
- Salary Plans
- Unit Salary Plans

## What do i need to do?

To uptake the new functionality, access the **Create Compensation Plan Security Assignment task**, then create security segments that restrict access to specific plan assignments to your desired security groups.

## What happens if i do nothing?

Student workers can continue to complete the Approval step on these business processes when it's for them:

- Designate Instructor Eligibility subprocess events related to instructor eligibility (secured to the Student Records functional area)
- Registration Withdraw Event (secured to the Student Records functional area)

Community link

<https://doc.workday.com/release-notes/en-us/stucurr/7792566.html#Impact-tab>

# Security - Segmented security for non-funded plans

## Additional considerations

Workday updates the **Create Compensation Plan Security Assignment** task. Workday adds:

- The Non-Funded Plan Types folder to the Compensation Plan Types prompt.
- The Non-Funded Plan folder to the Compensation Plan prompt.

Workday delivers several new report fields on these business objects:

- Adjustment For
- Employee Compensation Event
- Position
- Worker Business Process

All of the new report fields are secured to these new security domains:

- Self Service: Non-Funded Plan Assignments
- Worker Data: Non-Funded Plan Assignments

Community link

<https://doc.workday.com/release-notes/en-us/stucurr/7792566.html#Impact-tab>

# Workday 2024 release 2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
	<ul style="list-style-type: none"><li>• New Security domains: Worker Data: Non-Funded Plan Assignments Self Service: Non-Funded Plan Assignments</li><li>• Enables Segment security on Allowance, Calculated, Comission, Hourly, Period Salary, Salary, Unit Salary plans.</li><li>• New report fields on these business objects: Adjustment For Employee Compensation Event Position Worker Business Process</li></ul>	<div>Y/N:</div> <div>Impact description:</div>

Effort

<Hours>

Additional description if applicable

Defect link

Not applicable

Community link

<https://doc.workday.com/release-notes/en-us/hrcomp/7753316.html>



# Workday 2024 release 2 set-up based features

## Before Release

### Create Compensation Plan Assignment Security Segment

Name

\*

Funded Plan Types

Search



Funded Plan

By Type



All



### Create Compensation Plan Assignment Security Segment

Name

\*

Funded Plan Types



Funded Plan

Search



Bonus Plans



Merit Plans



Stock Plans



Create Merit Percent Plan

# Workday 2024 release 2 set-up based features

## After Release

### Create Compensation Plan Assignment Security Segment

Name \*

Compensation Plan Types

Compensation Plan

←

Non-Funded Plan Types

☐

 Allowance

☐

 Calculated

☐

 Commission

☐

 Hourly

☐

 Period Salary

☐

 Salary

☐

 Unit Allowance

☐

 Unit Salary

### Create Compensation Plan Assignment Security Segment

Name \*

Compensation Plan Types

Compensation Plan

Search

⋮

←

Non-Funded Plan

Allowance Plan

>

Calculated Plan

>

Commission Plan

>

Hourly Plan

>

Period Salary Plan

>

Salary Plan

>

Salary Unit Plan

>

# Security - User-based security group membership workflow

## What's changing

With the 2024R2 release, Workday enables you to add or remove multiple users from a single user-based security group.

This ensures appropriate compliance with your security procedures, while also streamlining the process of maintaining and approving changes in group membership. All changes made using this workflow will be fully documented in the audit trail.

Note:

## Additional considerations

Workday delivers new business processes for you to initiate changes in user-based security group membership:

- User-Based Security Assignment Event for User
- User-Based Security Assignment Event for Group

Using the new **Update User-Based Security Group Membership** initiating action, you can modify the users in a user-based security group. You can also use the new **User-Based Security Group Event for Group** web service to initiate the User-Based Security Assignment Event for Group business process.

## What Do I Need To Do?

1. Enable and configure the Process: User-Based Security Group Event domain security policy in the System functional area (under the Security Administration parent policy).
2. Configure the User Based Security Group Event for User business process security policy.
3. Create the User-Based Security Group Event for User business process default definition.
4. Access the Update User-Based Security Group Membership task.
5. (Optional) Use the Disable User-Based Security Group Tasks feature option to disable existing tasks for adding members to user-based security groups. These tasks won't route through the new business process definition. By disabling the existing tasks, all user-based security group assignment changes go through the new business process.

Community link

<https://doc.workday.com/release-notes/en-us/configsec/7866713.html>

# Security - User-based security group membership workflow (cont.)

## Additional Considerations

You can route these membership changes to other unconstrained security groups, for review, approval, or denial.

To ensure these tasks function as intended, we recommend disabling existing non-workflow enabled tasks using the **Disable User-Based Security Group** feature opt-in.

## Deployment Considerations

- Workday recommends against using both the business process and non-workflow enabled tasks, as this could cause conflicting assignments.
- Completed events are reported in the **Find Events and Security History for User** reports. You can also create custom reports for these events using the Security History for User data source.
- Upon initiation of the business process, Workday checks to see if there are any in-progress events. If so, a message displays advising the user to complete the in-progress event before proceeding.

## What happens if i do nothing?

- You won't experience any changes.

Community link

<https://doc.workday.com/release-notes/en-us/configsec/7866713.html>

# Workday 2024 release 2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
No Business processes to initiate changes to User based security groups.	2 New Business Processes, User-Based Security Assignment Event for User  User-Based Security Assignment Event for Group	<div>Y/N:</div> <div>Impact description:</div>

Effort

<Hours>

Additional description if applicable

Defect link

Not applicable

Community link

<https://doc.workday.com/release-notes/en-us/configsec/7866713.html>

# Workday 2024 release 2 set-up based features

## After Release

MENU

W

bp:user-based

96

View Business Process Definition

User-Based Security Group Event for Group (Default Definition)

Effective Date08/02/2024

Time ZoneGMT-08:00 Pacific Time (Los Angeles)

View Diagram

Security Group Restrictions

Initiating Security Groups

HR Administrator

Security Administrator

Step Routing Restricted to Security Group Types

User-Based Groups

Business Process Steps

Notifications

Allowed Actions by Role

Allowed Services

Related Links

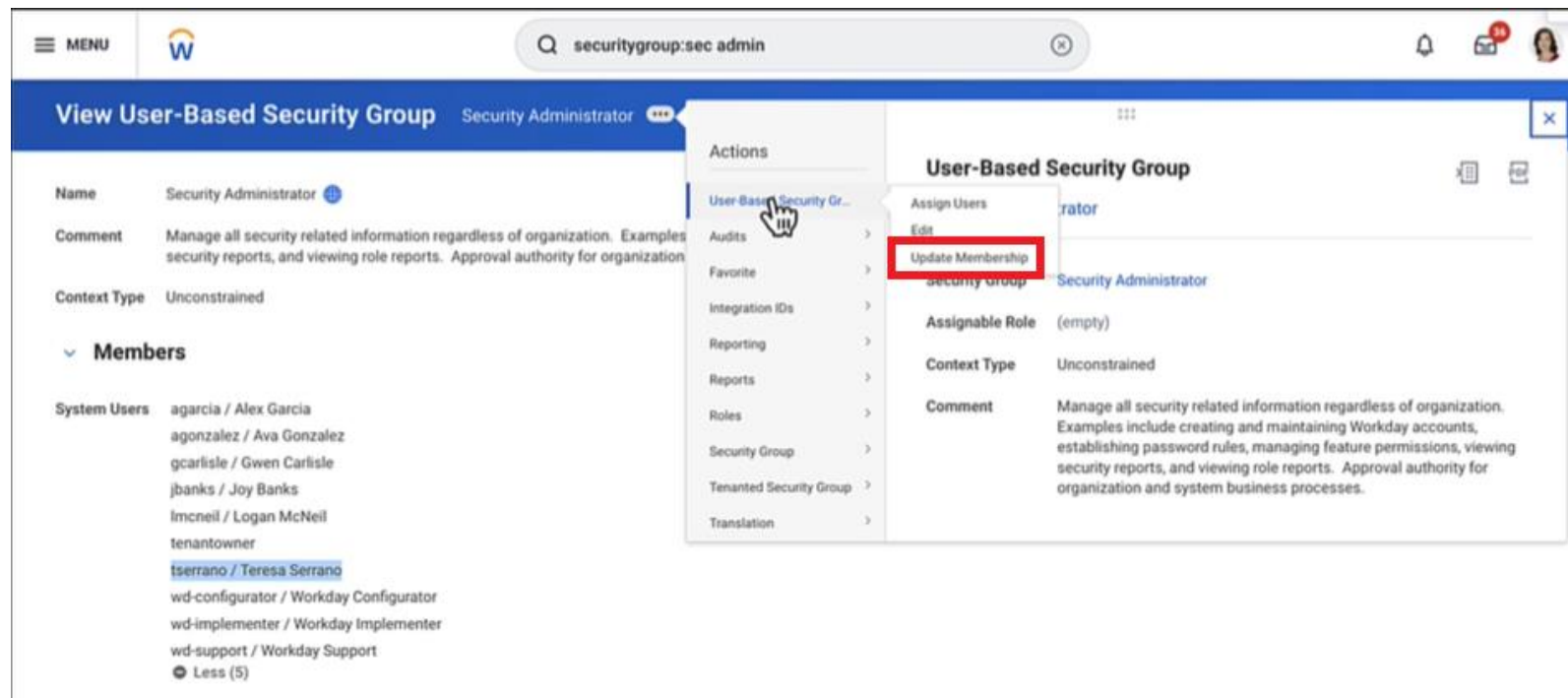
Available Rules & Fields

Business Process Steps2 items

Step	Order	Type	Specify	Optional	Group	Additional Information	All	Run As User	Due Date	Due Date Is Based On Effective Date	Complete
Q	a	Initiation		No							
Q	b	Action	Review Update User-Based Security Group Membership	No	Security Administrator	Restriction: Initiator, Approvers, Subject					

# Workday 2024 release 2 set-up based features

## After Release



# Workday 2024 release 2 set-up based features

## After Release

Update User-Based Security Group MembershipSecurity Administrator

Description

Manage all security related information regardless of organization. Examples include creating and maintaining Workday accounts, establishing password rules, managing feature permissions, viewing security reports, and viewing role reports. Approval authority for organization and system business processes.

Users

✕ agarcia / Alex Garcia

✕ agonzalez / Ava Gonzalez

✕ gcarliste / Gwen Carlisle

✕ jbanks / Joy Banks

✕ lmcneil / Logan McNeil

MORE (6)

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Comment

Search Results(1)

☒ bliu / Beth Liu

Update User-Based Security Group MembershipSecurity Administrator

Description

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Users

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✕ jbanks / Joy Banks

✕ lmcneil / Logan McNeil

✕ tenantowner

MORE (6)

Comment

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# Workday 2024 release 2 set-up based features

## After Release

View User-Based Security Group

NameSecurity Administrator

CommentManage all security related information regardless of security reports, and viewing role reports. Approve

Context TypeUnconstrained

> Members

You have submitted

Up Next: Security Administrator | Review Update User-Based Security Group Membership

[View Details](#)

You have submitted

User-Based Security Group Assignment Event for Group: Security Administrator

Up Next

Security Administrator

Review Update User-Based Security Group Membership

Do Another

Update User-Based Security Group Membership

Details and Process

ForSecurity Administrator

Overall ProcessUser-Based Security Group Assignment Event for Group: Security Administrator

Overall StatusIn Progress

Details

Process

Process History 5 items

Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comment
User-Based Security Group Event for Group	User-Based Security Group Event for Group	Step Completed	08/02/2024 01:10:46 PM		Logan McNeil	1	Logan McNeil: added per ticket 12345
User-Based Security Group Event for Group	Review Update User-Based Security Group Membership	Awaiting Action			Alex Garcia (Security Administrator)	4	

# Thank you