Automatically Available Features Manual

Workday 2024 Release 2

Release Preparation Window: August 17 – September 20, 2024

Production Release: September 21, 2024

Cognizant's Forward Looking Statement

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Workday's Safe Harbor

Today's presentation may contain forward looking statements that are subject to risks and assumption as described in Workday's SEC filings.

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Release Management Tips

Learn More

View the 'What's New Post' in Workday Community for feature highlights and question forums.

Read through our Feature Manual to learn about the key features being released in 2024R2 and access the ‘What’s New in Workday’ report in your tenant for the complete list.

Feature Delivery

These features will be automatically available.

Assess Impact

New features may require additional testing and may impact your training materials.

WD2024 R2 Automatic Features

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WD2024 R2 Automatic Features

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WD2024 R2 Automatic Features

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Financial Management

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WD2024 R2 Automatic Features

Platform and Product Extensions

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WD2024 R2 Automatic Features

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Adaptive Planning

Adaptive Planning 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.

Adaptive Planning

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Adaptive Planning - Actuals Import from Workday Financials

A

What's Changing

With this release, Workday provides additional Ledger Account and Ledger Account Summary validations.

Additional Considerations

Workday prevents selecting invalid account sets for the already selected company.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/plnpone/7902499.html

Adaptive Planning - Archived Versions for Data Freeze

A

What's Changing

With the 2024R2 Release, Workday introduces a new Archive version check box for plan versions. This check box enables you to archive plan versions, which results in a more complete data freeze. When you enable the check box, Workday calculates and store the values of all calculated and linked accounts. This freezes the values and stops them from recalculating as you make future changes to the model.

The Archive version check boxes displays for all plan versions and replaces all Calculate Formula Values check boxes that are inactive.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. Workday plans to deliver this to all customers on September 21, 2024.

Additional Considerations

Workday replaces the Calculate Formula Values check box with the new Archive version check box in the Version area of Modeling. The new check box provides more functionality to help you maintain data integrity in locked versions. With this feature, we enable you to:

- Make changes to the modeling hierarchies, like accounts and levels, with APIs, integration loaders, imports, and through the application without affecting the leaf data in archived versions. Rollup values within archived versions continue to aggregate dynamically based on structural changes.

What Do I Need To Do?

Plan versions that have the Calculate Formula Values check box enabled retain the Calculate Formula Values check box.

To use the new Archive version check box on these versions, you must first clear the Calculate Formula Values check box. Clearing the Calculate Formula Values check box causes the version to recalculate. Ensure you are comfortable with the potential data changes that may result before clearing the check box.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/plnpone/7902499.html

Adaptive Planning - Archived Versions for Data Freeze (cont.)

A

Additional Considerations

- Restate actuals data without affecting the actuals overlay or plan data within archived versions.

- Reconfigure linked accounts without affecting the data in archived versions. Example: You can assign different attributes or add filters to the link with no impact on the data of the archived version.

Community Link https://doc.workday.com/release-notes/en-us/plnpone/7902499.html

Adaptive Planning - Changes to User Interface

A

What's Changing

With 2024R2 release, Workday continues to align the Workday Adaptive Planning interface with Workday to provide a more consistent user experience.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. Workday plans to deliver this to all customers on September 21, 2024.

Additional Considerations

To provide a more consistent user experience, you can now update the following pages with a responsive design by selecting the Sheets, Reports, Dashboards check box on the Visual Preferences page in Administration:

- Reports Overview
- Scenario Manager Overview

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/plnuip/8001364.html

Adaptive Planning - Codes for Calendars and Modeled Sheet Display Columns

A

What's Changing

With the 2024R2 Release, Workday adds editable codes for your calendars. Workday also makes codes editable for display columns in modeled sheets.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. Workday plans to deliver this to all customers on September 21, 2024.

Additional Considerations

For calendars, Workday now provides:

- New Calendar Code fields when you rename your calendars.
- New Calendar Code column in the import and export excel sheet for calendars. In the first tab of the import template, Workday updated the instructions.
- Unique codes for existing calendars that we automatically create. The codes match the current calendar names. You can change these codes in the Time area of Modeling.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/plnmod/7846634.html

Adaptive Planning - Codes for Calendars and Modeled Sheet Display Columns (cont.)

A

Additional Considerations

For display columns in modeled sheets, Workday:

- Enables you to edit the Code fields.
- Automatically update codes for existing display columns to make them unique by appending an underscore and the column number. You can change these codes in the sheets area of Modeling.

For the Modeled Sheet Definition API, Workday:

- Change the purpose of the Code field. The Code field now corresponds to the code for the display column.
- Add a new field, called accountCode, which is now the code for the account that's associated with the display column.

Community Link https://doc.workday.com/release-notes/en-us/plnmod/7846634.html

Adaptive Planning - Create Associations with Attributes

A

What's Changing

With the 2024R2 Release, Workday enables you to create user associations using level and custom dimension attributes.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. Workday plans to deliver this to all customers on September 21, 2024.

Additional Considerations

Now, you can add level and custom dimension attributes to associations in addition to levels and custom dimensions.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/plnmod/6469342.html

Adaptive Planning - Financial Planning Configuration Manager

A

What's Changing

With this release, Workday enables you to load balance sheet journal line actuals data for assets, liabilities, and equities.

Workday provides a new Enable Balance Sheet checkbox.

Workday sets all Balance Sheet accounts to load actuals by balance.

Additional Considerations

N/A

What Do I Need To Do?

- Map Assets, Liabilities, and Equity accounts during initial PCM setup.
- Select the Enable Balance Sheet checkbox in the Actuals section.
- Activate the planning configuration manager application.
- Allow the Orchestration to run in Adaptive Planning.
- Review the Balance Sheet integration objects.
- Run the Unified Task to import data.

What Happens If I Do Nothing?

Your planning configuration manager application will remain unchanged.

Community Link https://doc.workday.com/release-notes/en-us/plnpone/8026517.html

Adaptive Planning - Import Ending Balance data for Balance Sheet from Workday Financials with High Volume Extract

A

What's Changing

With this release, Workday enables you to load balance sheet journal line actuals data for assets, liabilities, and equities using High Volume Extract.

Workday provides a new "Ending Balance" amount type.

Workday provides journal lines filtering by Balance Sheet Ledger Accounts and Summaries.

Additional Considerations

N/A

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/plnpone/8166106.html

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Adaptive Planning - Integration Planning Data Source Scalability

A

What's Changing

With this release, Workday uptakes the streaming version of exportData API in the Integration Planning Data Source.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. Workday plans to deliver this to all customers on September 21, 2024.

You can now use the Integration Planning Data Source to export 2 million rows of data from Adaptive Planning. Previously, the limit was 500,000 rows.

Additional Considerations

This feature supports all account types, except:

- System account (includes allocation, minority interest %, elimination, cumulative translation adjustment).
- Model sheet assumption account.
- Cube account with custom time stratum.

This feature supports all modeling features, except:

- Weighted average translation
- Text rollups
- Spread lookups
- Value lookups

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/plnint/8097193.html

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Adaptive Planning - Long-Running Processes in the Planning Center

A

What's Changing

With the 2024R2 Release, Workday provides a new report, Long-Running Processes, in the Planning Center. This feature enables you to review and cancel processes that have been running for more than 30 seconds.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. Workday plans to deliver this to all customers on September 21, 2024.

In the Planning Center, Workday provides a new section, called Process Dashboard. The Process Dashboard includes Long-Running Processes. When you click Long-Running Processes, Workday provides a list of processes that have been running for over 30 seconds.

You can use the Cancel button in the Action column to stop a process. When Workday doesn't enable you to stop a process, Workday displays uncancellable in the Action column.

Long-Running Processes include these process types: Sheet loads; APIs; Admin updates; Excel exports; Imports.

Admin updates include these processes: Version locking, cloning, and archiving; Copying or importing large sheets; Deleting sheets with high dimensionality; Deleting or changing custom dimensions or levels; Changing sheet definitions.

Additional Considerations

Workday only displays: Processes that have been running for over 30 seconds; The username of the person running the process.

Workday doesn't display: Processes after you canceled them; The related sheet, report, version, or model component.

What Do I Need To Do?

To use Long-Running Processes, you need the Planning Center permission.

What Happens If I Do Nothing?

N/A

Community Link

https://doc.workday.com/release-notes/en-us/plnfed/8008018.html

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Adaptive Planning - Machine Learning Predictive Forecaster

A

What's Changing

With the 2024R2 Release, Workday introduces Predictive Forecaster, powered by machine learning (ML). Predictive Forecaster leverages your historical data to populate specified forecast versions with ML predicted data.

Workday enables you to run time series forecasts with regressor data in addition to your historical data within the Workday Adaptive Planning platform. Workday provides the choice to select the most suitable ML algorithms based on patterns in your data. Workday also enables you to define the targeted forecast version, time ranges, accounts, and custom dimensions by sheet.

Workday also provides Confidence Metrics, which enables you to view a dashboard with charts. The charts offer insights into the accuracy and probability range of your forecasts.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. Workday plans to deliver this to all customers on September 21, 2024.

What Do I Need To Do?

Workday gives users access to the Predictive Forecaster, add the Predictive Forecaster permission to the permission sets.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/plnmod/7038702.html

Adaptive Planning - Machine Learning Predictive Forecaster (cont.)

A

Additional Considerations

Workday provides a new Predictive Forecaster permission in the Permission Sets of the Administration area. To access Predictive Forecaster, you must add the new permission to your permission sets.

From the new Predictive Forecaster page in Modeling, Workday enables you to create and run forecasts. You can run the forecast or save it and run it later. You can also rerun the same forecast.

In the Create Forecast form, Workday provides these sections to help you define the forecast:

- Forecast: Specify where to populate the forecasted data. You can select a specific sheet, any unlocked plan version, and the start and end periods.
- Filters: Focus your forecast on specific accounts, levels, and custom dimensions.
- Reference Data: Define the range of historical data that you want the algorithm to study. You can set the start and end periods of an actuals version. Workdays also enable you to add plan versions as additional reference data.
- Algorithm: Select from 8 algorithms. Workday also enables you to define seasonality and leverage regressor data with lever sheets.

Community Link https://doc.workday.com/release-notes/en-us/plnmod/7038702.html

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Adaptive Planning - Manage JDBC Sources in Data Agents

A

What's Changing

Workday now enables you to manage a JDBC source for an Adaptive Planning Data Agent, making it easy to associate a new data agent with an existing JDBC source.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. Workday plans to deliver this to all customers on September 21, 2024.

Additional Considerations

Workday provides a new Associated Agent field in the JDBC data source for users to link the data source with a different Adaptive Planning Data Agent.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/plnint/7224892.html

Adaptive Planning - Model Reports Scheduling

A

What's Changing

With this release, Workday enhances the report scheduling functionality to include model reports.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. Workday plans to deliver this to all customers on September 21, 2024.

Additional Considerations

To schedule model reports as live reports or snapshots, you need these permissions:

- Create Report Schedules
- (Optional) Manage all Report Schedules

To schedule model reports as attachments, you need these additional permissions, including the ones listed above:

- Send Attachments in Notifications
- Download to Excel. Both schedulers and recipients need this permission.

What Do I Need To Do?

To schedule model reports as live reports or snapshots, you need these permissions:

- Create Report Schedules
- (Optional) Manage all Report Schedules

To schedule model reports as attachments, you need these additional permissions, including the ones listed above:

- Send Attachments in Notifications
- Download to Excel. Both schedulers and recipients need this permission.

What Happens If I Do Nothing?

You'll see the Create Schedule option in the Actions menu for model reports. You can ignore the option.

Community Link https://doc.workday.com/release-notes/en-us/plnrptinfra/7996256.html

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Adaptive Planning - Rename Matrix Report Property

A

What's Changing

With this release, Workday renames the Optimize report for faster load time matrix report property label and header.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. Workday plans to deliver this to all customers on September 21, 2024.

Additional Considerations

- Renamed Optimize report for faster load time label to Optimize report execution.
- Renamed Advanced header to Optimization.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/doc/8032367.html

Adaptive Planning - Save Perspective Filters

A

What's Changing

With the 2024R2 release, Workday now enables you to save perspective filter sets in dashboards.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. Workday plans to deliver this to all customers on September 21, 2024.

Additional Considerations

Workday can now create and save personal perspective filters. Users with the Admin Access permission can create and save shared perspective filters. The Default shared filter from the filter button sets the perspective filter settings to the last published state.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/plndash/8001523.html

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Adaptive Planning - Waterfall Chart Improvements

A

What's Changing

With the 2024R2 release, Workday now enables you to select specific accounts in Data Settings for opening, variance, and closing accounts.

Using Multiple Variance Accounts provides more flexibility for waterfall chart analysis.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. Workday plans to deliver this to all customers on September 21, 2024.

Additional Considerations

Workday provides a new option in the waterfall chart Appearance Settings called Multiple Variance Accounts. With Multiple Variance Accounts enabled, Workday removes the Reference Value and Comparison Value fields and Workday adds the following new options in Data Settings:

Opening Account: The account for the waterfall start value.

Variance Accounts: The accounts used as variance values. You can have up to 20 Variance Accounts.

Closing Account: The account for the waterfall end value.

With Multiple Variance Accounts enabled Workday also updates waterfall charts by now:

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/plndash/8119770.html

Adaptive Planning - Waterfall Chart Improvements (cont.)

A

Additional Considerations

Removing the Labels Type and Axis Title fields.

Changing the data point tooltips to show time, account, version, and value.

Adding an Other column to let users know data is missing usually due to data access restrictions. The Other column doesn't support explore data and drill down options.

Note: If you enable Multiple Variance Accounts on an existing waterfall chart, settings related to reference and comparison values are preserved when you disable Multiple Variance Accounts.

Community Link https://doc.workday.com/release-notes/en-us/plndash/8119770.html

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Adaptive Planning - Write Back from OfficeConnect to Adaptive Planning

A

What's Changing

With this release, Workday enables you to submit data edits from valid leaf-level intersections in OfficeConnect reports to Adaptive Planning.

The ability to submit edits from OfficeConnect, enables you to:

- Update your planning data without leaving Excel.
- Use Excel capabilities such as formulas and copy and paste functions.

Additional Considerations

In writeback mode, you can only edit and submit changes for these supported elements:

- Accounts: Cube, Custom, GL, and Assumption.
- Levels: Leaf levels only.
- Versions: Plan versions and scenarios.
- Calendars: Default calendars only.
- Dimensions: For cube accounts all dimensions must be present.
- Attributes: Dimension attributes and corresponding dimensions must be present

What Do I Need To Do?

You need to install the latest version of the OfficeConnect add-in.

What Happens If I Do Nothing?

You'll see no changes in Adaptive Planning if you don't install the latest version of OfficeConnect.

Community Link https://doc.workday.com/release-notes/en-us/plnsheet/7928324.html

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Adaptive Planning - User Administration User Experience

A

What's Changing

With this release, Workday provides new interfaces for the Administration landing and user management pages.

The new interface improves the user experience and accessibility.

Additional Considerations

N/A

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/plnseceng/7991903.html

Analytics and Reporting

Analytics and Reporting 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.

Analytics and Reporting

- Support for Additional Languages in People Analytics
- Bulk Duplicate Composite Columns and Rows
- Business View Data Sources
- Calculation Expression Builder for Composite Cells
- Composite Report Performance
- Composite Report User Interface
- Currency and Numeric Format Output for Docs for Layouts
- Data Labels for Matrix Charts in Discovery Boards
- Facet Configuration View and Edit Functionality
- Format Text Calculated Fields
- Freeze Report Columns
- KPI Viz Display
- Maintain Reference IDs
- Maintain Report Usage for Saved Filters
- Mass Create Composite Report Rows
- Mass Edit Reference IDs of Report Tags
- Measure Formats for Discovery Boards
- Median and Percentile Summarizations in Discovery Boards
- Multi-instance and Instance Fields in Discovery Boards
- Reference Lines in Discovery Boards
- Report Tag Description and Reference ID
- Schedule Live Composite Reports
- Support Additional Languages on Discovery Boards
- Viz Options for KPI
- Worksheets Expanded Sharing Options for Security
- Worksheets Global Prompts for Live Data
- Worksheets Public and Private Filters

Analytics and Reporting - Support for Additional Languages in People Analytics

A

What's Changing

In this release Workday adds additional language support in 3 new languages.

Additional Considerations

Workday now supports these new languages:

- French (Canada)
- Korean
- Japanese

Any tenanted fields (custom field names) are kept in your pre-defined chosen language. Workday also supports localization for all the related tools including custom discovery boards and Slides.

What Do I Need To Do?

Workday will automatically make the feature available as part of the latest release and weekly refresh. Your user settings determine your system language.

Workday recommends that you log-out and login again if you change your preferred language.

Note: To use any newly supported languages with Hiring, you must migrate to Hiring V2.

What Happens If I Do Nothing?

If you do nothing, your configuration and chosen language do not change.

Community Link https://doc.workday.com/release-notes/en-us/stories/8115388.html

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Analytics and Reporting- Bulk Duplicate Composite Columns and Rows

A

What's Changing

With the 2024R2 release, Workday improves the composite report authoring experience by enabling you to duplicate columns and rows in bulk.

Additional Considerations

On the Create Custom Report and Edit Custom Report tasks, Workday adds the Duplicate button to the Rows and Columns tabs of your composite report. When you duplicate columns or rows, you can select their location in relation to another column or row on the report:

- First (Top)
- Before
- After
- Last (Bottom)

You can't select Before or After for duplicated columns that include a repeating column group, and you can't duplicate control field columns. Workday enables you to have a total of 200 rows on the report, including all row types, empty rows, and so on. If you exceed 200 rows, Workday disables the Duplicate button.

What Do I Need To Do?

This feature is automatically available. Workday recommends that you update your training materials so that users are aware of the changes to composite reporting.

What Happens If I Do Nothing?

Workday includes the new Duplicate button on your composite report definition.

Community Link https://doc.workday.com/release-notes/en-us/anacomposite/8072363.html

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Analytics and Reporting- Bulk Duplicate Composite Columns and Rows (cont.)

A

Additional Considerations

After you duplicate columns, you can click Edit General. After you duplicate rows, you can click:

- Edit Filter Criteria
- Edit Outline Structure
- Edit General

Refresh the report to populate it with your duplicated rows and columns.

Community Link

https://doc.workday.com/release-notes/en-us/anacomposite/8072363.html

Analytics and Reporting - Business View Data Sources

A

What's Changing

Workday makes it easier to understand the aspects of business view data sources by updating the View Business View Data Source report.

Additional Considerations

To improve clarity, Workday makes several updates to the View Business View Data Source report. For example, Workday:

- Renames the Business Objects tab to Components and remove unnecessary information.
- Adds a new Reports tab that displays the custom and standard reports that currently use the data source.
- Updates the columns on the Fields tab to clarify the details of the source fields that contribute to a field on the business view data source.

What Do I Need To Do?

Nothing. If you want to see the UI changes, access the View Business View Data source task from the related actions of a business view data source.

What Happens If I Do Nothing?

Nothing happens. Existing business view data sources behave like they did previously.

Community Link https://doc.workday.com/release-notes/en-us/anabizview/8183518.html

Analytics and Reporting- Calculation Expression Builder for Composite Cells

A

What's Changing

With the 2024R2 release, Workday improves the composite report authoring experience by enabling you to configure formulas and nested functions on cells. This feature makes it easier to select the calculations you need for your report and nest calculations.

Additional Considerations

- Can nest up to 5 functions for calculation cells.
- For Divide, you can select AbsRef (Absolute Reference) in the denominator to maintain the original cell reference regardless of its copied location on the report. AbsRef doesn't support nesting calculations.

What Do I Need To Do?

This feature is automatically available. Workday recommends that you update your training materials so that users are aware of the changes to composite reporting.

What Happens If I Do Nothing?

Workday includes the calculation expression builder for cells on your composite report definition.

Community Link

https://doc.workday.com/release-notes/en-us/anacomposite/7433996.html

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Analytics and Reporting- Composite Report Performance

A

What's Changing

With the 2024R2 release, Workday improves composite report performance.

Additional Considerations

Workday optimizes processing for composite reports with outline structures and repeating column groups.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link

https://doc.workday.com/release-notes/en-us/anacomposite/8075435.html

Analytics and Reporting- Composite Report User Interface

A

What's Changing

With the 2024R2 release, Workday improves the composite report authoring experience by centralizing the creation of cells.

Additional Considerations

Workday delivers the new Cells tab on composite reports that enables you to perform bulk actions on your cells, including:

- Configuring calculation expressions on calculation cells.
- Configuring true/false conditions for conditional value and conditional format cells.
- Maintaining the filter criteria for data cells.
- Formatting overrides.
- Reversing the sign for calculation cells.

What Do I Need To Do?

This feature is automatically available. Workday recommends that you update your training materials so that users are aware of the changes to composite reporting.

What Happens If I Do Nothing?

Workday displays your composite report definition using the new user interface.

Community Link

https://doc.workday.com/release-notes/en-us/anacomposite/7683911.html

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Analytics and Reporting - Currency and Numeric Format Output for Docs for Layouts

A

What's Changing

Printed documents that use a document layout now display:

- Currency and numeric values in a format according to user locale.
- A value in the same format that was applied to the currency or numeric data field in a custom report.

Additional Considerations

There are no visual changes in the document editor. Printed documents display currency and numeric values in the same format applied in the report.

What Do I Need To Do?

This change will not affect how document layouts use the calculated fields from a report or how printed documents use them to display currency and numeric values. However, if you are using a calculated field specifically for formatting currency and numeric values, workday recommend you apply the formats to standard data fields in the report and use those data fields in the document layout instead.

For document layouts created prior to this feature release, and any time you add, remove, or change a data field format in a report, you must remove the data fields from the document layout and re-add them in order for printed documents to accurately display formatted currency and numeric values.

What Happens If I Do Nothing?

Printed documents will continue to use any calculated fields formatted in the report for displaying currency and numeric values.

Community Link https://doc.workday.com/release-notes/en-us/contentplat/8092733.html

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Analytics and Reporting - Data Labels for Matrix Charts in Discovery Boards

A

What's Changing

Users can now view data labels on Matrix charts in discovery boards.

Additional Considerations

Users can choose to display data labels on Matrix charts by selecting the 'Display Data Labels' check box from the Options tab in the Configurations panel. This enables viewers to consume and compare exact values when working on a discovery board. Users can display data labels on all measures or selected measures.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/anadisco/8023786.html

Analytics and Reporting - Facet Configuration View and Edit Functionality

A

What's Changing

With this release, Workday has enhanced the functionality of facet configurations by extending the view and edit capabilities of facet configuration to additional personas other than the facet configuration owner.

Extending the view and edit capabilities simplifies the authoring experience and reduces the cost of report maintenance.

Additional Considerations

Workday now enables report writers to view and edit reports they have access to, regardless of the facet configuration owner. Additionally, users can save reports with facets owned by a different user, view facet configurations that are linked to the reports they have access to, and copy reports they have access to along with the facet configuration.

Custom Report Administrators can also view and edit the facet configuration. With this update, Workday reduces the cost of report maintenance and improve user productivity.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/anabi/8078077.html

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Analytics and Reporting - Format Text Calculated Fields

A

What's Changing

With this release, Workday gives you more control over how your data displays by enabling you to remove or replace special characters and delimiters in text fields.

Additional Considerations

When you create or edit a format text calculated field, Workday adds Replace Delimiter to the Options prompt on the Calculation tab.

If you enter:

- A space in the Replacement Text field, Workday treats that character as null or empty.
- Special characters in the Text Delimiter field, copy the character exactly as-is. Workday treats the double space characters used in those languages as 1 character. This is particularly true for characters from Asian languages.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/anabi/7316630.html

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Analytics and Reporting- Freeze Report Columns

A

What's Changing

With the 2024R2 release, Workday makes it easier for end users to view tabular data on reports by enabling them to freeze columns of their choosing.

Additional Considerations

When end users run 1 of these custom or standard report types and select Grid Preferences, we enable them to drag and drop columns to freeze on the report:

- Advanced
- Composite
- Simple
- Transposed

Workday disables freezing for composite reports that have:

- Column or row groupings.
- Multilevel column headers.
- Repeating column groups.

If the report doesn't have columns eligible to freeze, Workday doesn't display the Column Preferences menu to the report user.

Workday retains your grid preferences when you log into Workday, but not when you export the report.

What Do I Need To Do?

This feature is automatically available. Workday recommends that you update your training materials so that users are aware of the changes to reporting.

What Happens If I Do Nothing?

Workday displays the freeze column functionality on custom and standard reports for end users to use.

Community Link https://doc.workday.com/release-notes/en-us/anacomposite/7683187.html

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Analytics and Reporting - KPI Viz Display

A

What's Changing

With the 2024R2 release, Workday now provides users with the comparison period details on a viz, users no longer need to use the tooltip for this information.

Additional Considerations

With this release, users can enable 'Show Date Ranges on Visualization' from the related actions menu of a date range to show date ranges on their KPI viz and view the details of the periods used for comparison on the viz. Workday also displays a description label of the KPI viz including all data elements.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/anadisco/8147289.html

Analytics and Reporting - Maintain Reference IDs

A

What's Changing

With the 2024R2 release, Workday expands on the Maintain Reference IDs task.

Additional Considerations

Workday enables you to select outline structures and report tags as the Business Object on the Maintain Reference IDs task so you can change their Reference ID Value.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/anacomposite/8130189.html

Analytics and Reporting - Maintain Report Usage for Saved Filters

A

What's Changing

With this release, report administrators can use the Manage Report Usage task to remove saved filters owned by active users on a report.

Additional Considerations

Workday haves updated the Manage Report Usage task to enable report administrators to delete saved filters owned by active users on a report.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/anabiins/8133372.html

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Analytics and Reporting- Mass Create Composite Report Rows

A

What's Changing

Workday improves the composite report authoring experience by enabling you to create lookup data rows in bulk.

Additional Considerations

On the Create Custom Report and Edit Custom Report tasks, Workday adds the Bulk Add Rows button to the Rows tab of your composite report. For lookup data rows, Bulk Add Rows enables you to:

- Change or view the selected Business Object And Hierarchy option.
- Expand or collapse all nodes in the hierarchy.
- Select a node to add to the report.
- Select a node and its children to add to the report.
- Select a node and its descendants to add to the report.

What Do I Need To Do?

This feature is automatically available. Workday recommends that you update your training materials so that users are aware of the changes to composite reporting.

What Happens If I Do Nothing?

Workday includes the new Bulk Add Rows button on your composite report definition.

Community Link https://doc.workday.com/release-notes/en-us/anacomposite/7526239.html

Analytics and Reporting- Mass Create Composite Report Rows (cont.)

A

Additional Considerations

Workday enables you to have a total of 200 rows on the report, including all row types, empty rows, and so on. When you add rows, you can:

- Insert the child nodes first, then include the parent nodes below.
- Exclude immediate parents with only 1 child.
- Use your Node Value Display Field Override selection from the Outline Structure.

Workday disables Bulk Add Rows if you exceed 200 rows.

Note: To enable the feature, you must have the Business Object and Hierarchy Structure configured in the Business Object Enabled for Filtering and Grouping grid on the General tab of the gear icon.

Community Link https://doc.workday.com/release-notes/en-us/anacomposite/7526239.html

Analytics and Reporting - Mass Edit Reference IDs of Report Tags

A

What's Changing

With this release, Workday has updated the Maintain Reference IDs task to enable users to bulk edit reference IDs for Report Tags.

Additional Considerations

When a user runs the Maintain Reference IDs task, they can update the reference IDs for multiple Report Tags at one time.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/anabiins/8023776.html

Analytics and Reporting - Measure Formats for Discovery Boards

A

What's Changing

With the 2024R2 release, Workday introduces more field formatting options for number and currency fields in Discovery Boards.

Additional Considerations

In Discovery Boards, users can now apply new measure formats to number and currency values. Users can select 'formatting' from the field option and edit the formatting options to improve readability. After editing, users can reset all field formatting values to default. With this release, users can also choose a custom formatting type and enter a supported format to suit their report output. The sample value gives users a clear indication of how the formatting will look in the chart.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/anadisco/8023780.html

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Analytics and Reporting - Median and Percentile Summarizations in Discovery Boards

A

What's Changing

With the 2024R2 release, Workday make it easier to analyze and visualize HR metrics, such as compensation data, by enabling median and percentile values in vizzes that use Workday-delivered data sources.

Additional Considerations

Workday enables the median and percentile summarization fields in vizzes that use Workday-delivered data sources. When you expand a Numeric or Currency field in the discovery board builder panel, Workday now includes Median and Percentile summarization options.

When you select Percentile, you can then select one of these percentile values:

5

10

25

50 (the same value as median)

75

90

95

97

98

99

What Do I Need To Do?

You don't need to do anything.

However, if you want to view percentile or median metrics in a viz, then you can select a median or percentile summarization field from a Numeric or Currency and use it in a drop zone that supports summarization fields.

What Happens If I Do Nothing?

Nothing happens. All vizzes display the same data as before.

Community Link https://doc.workday.com/release-notes/en-us/anadisco/8076024.html

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Analytics and Reporting - Multi-instance and Instance Fields in Discovery Boards

A

What's Changing

With the 2024R2 release, Workday now enables you to use Multi-instance fields from Prism data sources in discovery boards. Workday also improves how you select filter values for Instance fields from Prism data sources.

Additional Considerations

Workday enables you to use Multi-instance fields from Prism data sources in discovery boards. You can now use Multi-instance fields:

- In the Columns drop zone of Table vizzes.
- As filters in the Filter panel for any viz type.
- In the Show Details configuration for a business object by using the Maintain Field Lists for Discovery Boards task.

What Do I Need To Do?

You don't need to do anything. If you want to use a Multi-instance field from a Prism data source in a Table viz or a filter for any viz, you can edit an existing viz or create a new viz.

What Happens If I Do Nothing?

Nothing. All discovery board filters work as before.

Community Link https://doc.workday.com/release-notes/en-us/anadisco/7930950.html

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Analytics and Reporting - Multi-instance and Instance Fields in Discovery Boards (cont.)

A

Additional Considerations

Workday also improves how you select discovery board filter values for Instance fields for Prism data sources to make the experience more like other data source types. Now, when you select a filter value for an Instance field in a Prism data source, you can:

- Search for a specific value.
- Navigate through the folder hierarchy to find the desired value when the field uses a hierarchy.
- View all possible field values in the tenant, including values that aren't in the Prism data source.
- View only the field values in the Prism data source as a flat list using the new "Values from Data Source" folder in the filter.

Community Link https://doc.workday.com/release-notes/en-us/anadisco/7930950.html

Analytics and Reporting - Reference Lines in Discovery Boards

A

What's Changing

With the 2024R2 release, Workday enables to add static and dynamic reference lines to a bar, line, and area vizzes in Discovery Boards to measure results against a specific target.

Additional Considerations

With the introduction of reference lines on Discovery Board bar, line, and area vizzes, users can compare data against specific values or thresholds. Users can add up to 5 reference lines as a value or a percentage and label the reference lines to suit their objective. This provides users with a visual guide for comparing data.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/anadisco/8023795.html

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Analytics and Reporting - Report Tag Description and Reference ID

A

What's Changing

With this release, users can add a description to report tags enabling them to easily identify report tags and their purpose. Users can also edit the Reference ID of a report tag on the UI.

Additional Considerations

With this release, users can add a description to report tags enabling them to easily identify report tags and their purpose. Users can now see the report tag's description when a report tag is migrated with the reports, making is easier to maintain and build reports faster. In the Maintain Report Tags task and the View Report Tags task, users can select the magnifying glass to view and edit the report tag and the report tag reference ID.

Users can also edit the reference ID of a report tag simplifying the overall maintenance and improving user experience.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/anabiins/8078073.html

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Analytics and Reporting- Schedule Live Composite Reports

A

What's Changing

Workday gives you more flexibility in how you view data for large composite reports by enabling you to schedule them to run in the background.

Additional Considerations

Workday adds the new View in Browser option to the Output Type section on the Output tab in the Schedule a Report task.

When you select View in Browser, Workday runs the composite report in the background and delivers a notification when the report results are ready. The composite report results are a snapshot from when the background task finished, but the drill-down and outline expansion results are interactive, real-time data.

Once you receive the notification, you can click View Scheduled Report for up to 5 days from when the report ran. The button enables you to interact with your real-time data, such as drill down on values, collapse and expand hierarchies, interact with charts, and so on.

You can't share the report when you select View in Browser.

What Do I Need To Do?

This feature is automatically available. Workday recommends that you update your training materials so that users are aware of the changes to composite reporting.

What Happens If I Do Nothing?

Workday includes the View in Browser option on the Schedule a Report task.

Community Link https://doc.workday.com/release-notes/en-us/anacomposite/7683938.html

Analytics and Reporting - Support Additional Languages on Discovery Boards

A

What's Changing

With this release, Workday localizes discovery boards.

Additional Considerations

Now discovery boards support these languages:

- French Canadian
- Japanese
- Korean

What Do I Need To Do?

Workday automatically displays discovery boards in 1 of these languages if you selected them as your Preferred Display Language on the Change Preferences task:

- French Canadian
- Japanese
- Korean

What Happens If I Do Nothing?

- You'll see no changes in Workday.

Community Link https://doc.workday.com/release-notes/en-us/anadisco/6896720.html

Analytics and Reporting - Viz Options for KPI

A

What's Changing

With the 2024R2 release, Workday have moved KPI viz options to the configuration panel so users can edit the display options for their viz in one place.

Additional Considerations

In the Configuration Panel on a Discovery Board, users can now edit the display options for their KPI viz. This reduces the time users spend going through the axis menu to find what they need to customize their viz. This feature creates an alignment for axis options across Discovery Board viz types.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/anadisco/8023770.html

Analytics and Reporting - Worksheets Expanded Sharing Options for Security

A

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.

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.

Note: This functionality is only available to Analytics and Reporting Preview customers currently. Workday plans to deliver this to all customers on September 21, 2024.

Additional Considerations

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 per mission 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 https://doc.workday.com/release-notes/en-us/uxbi/7718849.html

Analytics and Reporting - Worksheets Global Prompts for Live Data

A

What's Changing

In a workbook with multiple live data areas that are based on a Workday report, you no longer need to manage each set of live data prompts separately. After you select a set of prompts to be global prompts, you can then apply those prompt values to all live data areas in all sheets (reports) in the workbook.

Global prompts are supported for advanced, matrix, and composite reports.

Additional Considerations

A new *Set as Source Report* option is added to the Options page of the Live Data Wizard.

A new *Source* indicator displays in the live data details panel to show whether a live data area contains global prompts.

What Do I Need To Do?

The new global prompt feature is available automatically. No action is needed.

You can use global prompts for existing workbooks or for new workbooks:

- For existing workbooks, select to edit the report prompts by clicking the Edit link in the live details panel. Then follow the steps below.
- For new live data areas, click Add Live Data and follow the Data Wizard workflow to select a source report and map prompts to the source report, as described below

To assign global prompts for live data and map those prompts to other areas in the workbook:

1. Assign a source report: In the Data Wizard Select Options page, select the Set as Source Report option. You can select only one source report for a workbook.

Community Link https://doc.workday.com/release-notes/en-us/uxbi/6292271.html

Analytics and Reporting - Worksheets Global Prompts for Live Data (cont.)

A

What Do I Need To Do?

2. Map other live data area prompt values to the global prompts, using one of these methods:

- In the Data Wizard Select Prompt Values page, select Map to Existing Prompt, then select the defined global prompt.

- In the live data details panel, go to the Prompts section or Global Prompts section and click Edit.

In the live data details panel, you see a Source identifier if the live data area is being used as the global prompt source report.

What Happens If I Do Nothing?

If you don't turn on the Set as Source Report option in the Data Wizard, no change occurs in the workbook behavior.

Community Link https://doc.workday.com/release-notes/en-us/uxbi/6292271.html

Analytics and Reporting - Worksheets Public and Private Filters

A

What's Changing

Worksheets now enables you to add private filters in workbooks. Private filters affect only the individual person's view; everyone else sees all the data, or any public filters if they exist. You can manage private filters and public filters using the new Filters menu option in the Worksheets menu bar.

Additional Considerations

A new Filter menu option is available. Use this menu to add and manage filters. Filter icons identify whether a filter is active or inactive.

As part of this feature, these menu bar options are changing:

- Data Menu: The Filter option is removed.
- Filter menu: The new Public Filter and Private Filter options are added.
- For the unrelated external references functionality, the Get External Reference option is now in the Data menu.

What Do I Need To Do?

The new filtering feature is available automatically. No action is needed.

To add a private filter, click any cell containing data, then select Filter > Private Filter > Start Private Filter.

- A banner displays to indicate the use of private filters.
- A filter icon appears in each column heading. Click the icon to define the filter. Select or clear check boxes depending on which data you want to show.

Community Link https://doc.workday.com/release-notes/en-us/uxbi/7840227.html

Analytics and Reporting - Worksheets Public and Private Filters (cont.)

A

What Do I Need To Do?

To add a public filter, click any cell containing data, then select Filter > Public Filter > Start Public Filter.

- A banner displays to indicate the use of private filters.
- A filter icon appears in each column heading. Click the icon to define the filter. Select or clear check boxes depending on which data you want to show.

Note that when you apply a private filter, you are filtering the entire dataset. For example, if you apply a private filter to a range of data that already has a public filter, the private filter will be for the full dataset and not merely the filtered rows from the public filter.

What Happens If I Do Nothing?

Nothing. All discovery board filters work as before.

Community Link https://doc.workday.com/release-notes/en-us/uxbi/7840227.html

AUS Payroll

AUS Payroll 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.

AUS Payroll

- Australia Termination Payments
- Single Touch Payroll Enhancements

AUS Payroll - Australia Termination Payments

A

What's Changing

Workday enables you to more easily manage termination payments in Payroll Australia.

Additional Considerations

Workday delivers a new report field AUS - ATO Cessation Type for the Termination Reason in a Termination Event, on the Termination Event business object.

Workday also updates the name of an existing report field from AUS - ATO Cessation Type for the Termination Reason to AUS - ATO Cessation Type for the Termination Reason for the worker's Effective Termination.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/paywdaus/7951134.html

AUS Payroll - Single Touch Payroll Enhancements

A

What's Changing

Workday continues to enhance Single Touch Payroll (STP), enabling you to report payroll data to the Australian Taxation Office (ATO).

Additional Considerations

Workday now reports back the statuses from the STP sending service provider. When an STP report is sent we may now show these statuses in the All AUS STP Reports task:

- Queued
- Submitted
- Accepted
- Partially Accepted
- Rejected

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/paywdaus/7951135.html

Benefits

Benefits 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.

Benefits

- Benefit Elections User Experience Redesign

Benefits - Benefit Elections User Experience Redesign

A

What's Changing

Workday transitions the Benefit enrollment landing page and Current Elections summary to the card framework workers' view of their benefit elections.

Additional Considerations

Workday improves the worker's experience of managing their benefits with the card framework, providing a quick-glance view that is consistent throughout Benefits.

Workday updates the worker's view of their current benefit elections from the grid to the card format in these locations:

- The Benefit Election tab in the Benefits and Pay Hub.
- The Benefits tab in the worker's Profile.
- The Current Benefit Elections page, when you select Benefits > View My Current Benefit Elections from the related actions menu of worker's Profile.

Workers can click the new View as Grid button to see their elections as a grid and to print or download as a spreadsheet.

What Do I Need To Do?

No action is required. Workday automatically displays the card view.

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

What Happens If I Do Nothing?

No action is required to view the new views. To export current benefit election summary information, you can view the summary as a grid.

Community Link https://doc.workday.com/release-notes/en-us/hrbenenroll/7390460.html

CAN Payroll

CAN Payroll 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.

CAN Payroll

- Record of Employment (ROE) Reporting
- Retro Transaction Types for Payroll for Canada

CAN Payroll - Record of Employment (ROE) Reporting

A

What's Changing

With this release, Workday continues to improve Record of Employment (ROE) Reporting.

Additional Considerations

Insurable Details

Workday updates the Insurable Details grid on records of employment (ROEs) to not display payroll result lines if there are no insurable hours and amounts to report.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/paywdcan/8132971.html

CAN Payroll - Retro Transaction Types for Payroll for Canada

A

What's Changing

With this release, Workday supports payroll retro transaction types for Payroll for Canada that were previously unsupported events. Retro events associated with the End Additional Job, Pay Group Change, and Tax Authority events now process as supported retro events.

Additional Considerations

Workday removes these transaction types from the All Unsupported Payroll Retro Transaction Types report and add them to the All Supported Payroll Retro Transaction Types report:

- Retro End Additional Job
- Retro Pay Group Change
- Retro Tax Authority Change

Workday now processes retro events associated with these transaction types as supported retro events.

Example: For Payroll for Canada, Retro Tax Authority doesn't recalculate taxes under separate tax authorities. Workday calculates taxes using the primary pay group and reconciles taxes with the primary pay group current tax authority.

What Do I Need To Do?

To benefit from all the supported retro changes, select the Enable Retro Processing in Primary Pay Group check box on the Edit Tenant Setup - Payroll task.

What Happens If I Do Nothing?

If you do not select the Enable Retro Processing in Primary Pay Group check box on the Edit Tenant Setup - Payroll task, these Retro events will not process as supported retro events.

Community Link https://doc.workday.com/release-notes/en-us/paywdretro/7651744.html

Compensation

Compensation 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.

Compensation

- Data Entry Check in Compensation Review
- Total Value Matrix Web Services
- Validation Rules for Custom Calculations
- Amount and Assigned Fields in Compensation
- Rating and Class Factors for Collective Agreement

Compensation - Data Entry Check in Compensation Review

A

What's Changing

In Workday 2024R2, Workday increases the accuracy and reliability of manually entered numeric compensation review data.

Additional Considerations

Workday delivers the new Data Entry Check Options section to the Edit Tenant Setup - HCM task. If selected (default), Workday enables the Machine Learning Data Entry Check (DEC) functionality for HCM. If you don't want to use DEC, clear the check box. If you want to use DEC for only select fields, click Select areas to switch on Data Entry Check and clear the box of any fields you don't want DEC on. For compensation review, these are editable, numeric fields in the configurable grid. When selected, Workday uses machine learning on successfully completed compensation review events to validate the data you enter in the selected fields.

What Do I Need To Do?

Data Entry Check is delivered automatically on.

Note: When setting up your compensation review grid configuration, ensure any DEC-enabled numeric field is set to editable. DEC only works on editable, numeric fields.

To disable specific compensation review fields for Data Entry Check:
Access the Edit Tenant Setup - HCM task.
In the Data Entry Check section, click Select areas to switch on Data Entry Check.
Unselect 1 or more compensation review fields.

What Happens If I Do Nothing?

Data Entry Check will be automatically on. Any editable, DEC-enabled field on your compensation review grid will check for anomalies and throw an ignorable warning in case of anomalies.

Note: The Switch on Data Entry Check Everywhere option is enabled by default. If you don't want to use Data Entry Check at all in HCM, disable this option.

Community Link https://doc.workday.com/release-notes/en-us/hrcomprev/8159327.html

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Compensation - Total Value Matrix Web Services

A

What's Changing

Workday 2024R2 extends Total Value Compensation Matrix functionality, delivered with 2024R1, with new columns for the Get and Put Compensation Matrices web services.

Additional Considerations

Workday updates the Get Compensation Matrices and Put Compensation Matrices web services. We add the new Total Value Compensation Matrix section, and these new columns:

- Amount
- Calculation
- Default Currency
- Percent
- Weighted

What Do I Need To Do?

Download the new web service template to see the additional fields added.

What Happens If I Do Nothing?

You can continue to create the total value compensation using the Create Compensation Matrix task.

Community Link https://doc.workday.com/release-notes/en-us/hrcomprev/7346624.html

Compensation - Validation Rules for Custom Calculations

A

What's Changing

Workday 2024R2 makes custom calculations more consistent and reliable. Workday enables validation rules when editing custom calculation fields during compensation reviews. These validation rules provide greater consistency across editable fields in the compensation review grid.

Additional Considerations

Workday 2024R2 enables validations to evaluate real time edits to these custom calculation fields in the compensation review grid:

- Custom Calculation Bonus Currency
- Custom Calculation Bonus List Value
- Custom Calculation Bonus Numeric
- Custom Calculation Bonus Percent
- Custom Calculation Merit List Value
- Custom Calculation Merit Currency
- Custom Calculation Merit Numeric
- Custom Calculation Merit Percent
- Custom Calculation Promotion List Value
- Custom Calculation Stock List Value
- Custom Calculation Stock Currency
- Custom Calculation Stock Numeric
- Custom Calculation Stock Percent

Workday validates your entry when you navigate out of the field.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/hrcomprev/7372395.html

Compensation - Amount and Assigned Fields in Compensation

A

What's Changing

Workday removes the Assigned field from Compensation business processes and update the Amount field functionality for MBT workers.

Additional Considerations

Workday removes the Assigned field from these Compensation business processes:

- Change Default Compensation
- Propose Compensation Change
- Propose Compensation Hire
- Propose Compensation Offer/Employment Agreement
- Request Compensation Change
- Requisition Compensation

What Do I Need To Do?

Nothing. This feature is automatically available.

What Happens If I Do Nothing?

The feature is automatically available in your tenants. Workday recommends that you update your training materials so that users are aware of the changes.

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

Compensation - Amount and Assigned Fields in Compensation (cont.)

A

Additional Considerations

The Assigned field applied only to Manage by Basis Total (MBT) workers for these Compensation plan types:

- Percent-based allowance plans
- Percent-based calculated plans
- Percent-based commission plans
- Period salary plans

Workday is also changing how the Amount field works for MBT workers. Workday only updates the Amount field when an event causes a recalculation of MBT, such as a change to the Primary Compensation Basis. To ensure that Workday persists an updated Amount, update a value that causes a recalculation of MBT.

What Do I Need To Do?

Nothing. This feature is automatically available.

What Happens If I Do Nothing?

The feature is automatically available in your tenants. Workday recommends that you update your training materials so that users are aware of the changes.

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

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Compensation - Rating and Class Factors for Collective Agreement

A

What's Changing

You can now include collective agreement class and rating fields when you model your compensation basis allocation.

Additional Considerations

Workday 2024R2 updates the Model Allocation by Compensation Basis report with these new fields:

- Collective Agreement Class
- Collective Agreement Rating

The new fields display only if you select Change Job, Hire, or Position Change from the Model prompt.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/hrcomp/7893071.html

Core HCM

Core HCM 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.

Core HCM

- Change Job New User Experience for Workflow Steps
- Change Job Templates New User Experience on Mobile
- Configurable Address Components
- Consolidated Hire Business Process
- Effective Dating Enhancements for Job Profile
- Enhancements to Change Job New User Experience
- Hire Employee Additional Information and Redesign
- Job Profile Skill Suggestions
- Job Profile User Interface
- Job Profile Web Services
- Manage Data via Web Services
- Manage Job Profile Business Process Reporting
- Overview Tab
- Security for Personal Information Items
- Security for Worker ID (REST) and Employee ID Report Fields
- Maintain Change Job Templates Redesign
- Effective Dating for Service Dates
- Related Actions Icon Enhancement

Core HCM - Change Job New User Experience for Workflow Steps

A

What's Changing

With this release, Workday continues to enhance the change job experience for other business process workflow steps. Workday supports a consistently streamlined experience by providing the simplified user interface throughout different steps of the Change Job business process.

Additional Considerations

The Apply Templates on Review and Approve steps capability (in Maintain Change Job Templates) is not required to use the enhanced user interface on workflow steps. It will continue to apply template configurations on subsequent workflow steps to minimize information shown.

The simplified user interface is applied to change job workflow steps and consolidated subprocesses. Other subprocesses or steps in the business process definition will not experience a change in layout.

What Do I Need To Do?

The enhanced user experience is automatically available on workflow steps for templates with the Enable Enhanced UI for this Template check box selected.

To enable the new Change Job Interface, select the Enable Enhanced UI for this Template check box for applicable Change Job templates.

What Happens If I Do Nothing?

The Change Job user interface on workflow steps remains unchanged for Change Job templates that don't have the enhanced user interface enabled.

For templates with the Enable Enhanced UI for this Template check box selected, no action is required and the new user interface is automatically available on subsequent workflow steps.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/8123372.html

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Core HCM - Change Job Templates New User Experience on Mobile

A

What's Changing

With this release, Workday enables you to leverage the simplified user interface in mobile for change job templates that don't include subprocesses.

Additional Considerations

Workday now displays the simplified user experience in mobile when users launch templates that don't include these subprocesses:

- Assign Collective Agreement
- Change Organization Assignments
- Propose Compensation

What Do I Need To Do?

You don't need to do anything. This update is automatically available.

What Happens If I Do Nothing?

Existing change job templates with these configured will use the simplified user experience when they're launched on mobile:

- Enable Enhanced UI for this Template check box selected.
- Subprocesses selected in the Template Subprocesses prompt.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/8157448.html

Core HCM - Configurable Address Components

A

What's Changing

Workday continues to improve how you configure address components by country, giving you greater control over address information. With this release, Workday enables you to configure autofilled address data in the Maintain Address Components by Country task, and Workday delivers a default mapping of vendor address components by country.

Additional Considerations

With this release, Workday updates the Maintain Address Components by Country task with a new Vendor Address Component column. This column appears if you have Global Address Lookup or Global Address Validation active for any country. You can use this column to map address components from a third-party vendor to Workday address components for both Recruiting Addresses and all other Addresses in Workday.

Workday adds a collapsable preview section to the Maintain Address Components by Country task to show a configured address.

What Do I Need To Do?

This feature is Automatically Available, but the new Vendor Address Component column only appears in the Maintain Address Components by Country task if you have Global Address Lookup or Global Address Validation active for that country

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/hrperson/8106458.html

Core HCM - Configurable Address Components (cont.)

A

Additional Considerations

Workday delivers new report fields on the new External Vendor Delivered Address business object (secured to the Public Reporting Items domain) that you can use in condition rules that return vendor address data components:

- Administrative Area Level 1
- Administrative Area Level 2
- Locality
- Sublocality Level 1
- Sublocality Level 2
- Postal Code
- Postal Code Suffix
- Street
- Substreet
- Premise Number
- Subpremise Number
- Post Box

Workday also delivers new Calculated fields on the External Vendor Delivered Address business object:

- Street and Premise
- Premise Number and Street
- Street and Premise Number and Subpremise Number
- Subpremise Number / Premise Number and Street
- Forward slash (/) if Subpremise Number Exists
- Does Subpremise number exist?
- Premise Number and Street comma (,) and Subpremise Number
- Comma (,) if Subpremise exists
- Subpremise Number-Premise Number Street
- Dash (-) if Subpremise exists
- Subpremise Number and Street and Premise Number

Workday updates web services to support the new Vendor address Component Reference field that you can use to maintain address configuration by country:

- Get Address Components by Country
- Put Address Components by Country

Community Link https://doc.workday.com/release-notes/en-us/hrperson/8106458.html

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Core HCM - Consolidated Hire Business Process

A

What's Changing

Workday 2024R2 enables you to create a consolidated hire business process.

Additional Considerations

Consolidated Templates

You can now add these sub business processes to the consolidated template in the Configure Business Process Consolidated Template task:

- Assign Employee Collective Agreement
- Assign Pay Group
- Change Organization Assignments for Worker
- Edit Government IDs
- Edit Service Dates
- Payment Election Enrollment Event
- Service Date Changes

If you want to add rules to your consolidated template, add your business process in the Configure Rule Based Consolidate Template task.

To have a consolidated experience for review and approval, add the Review and Approval step to your Hire business process definition.

What Do I Need To Do?

- Initiate the Hire Employee task to view and manage the consolidated business process.
- When you configure Assign Pay Group and Payment Election Enrollment Event as subprocesses, we recommend that you also configure Change Organization Assignments for Worker. This ensures accuracy as well as efficiency in processing payroll for this worker.
- You must select a company on the Change Organization Assignments for Worker step to add a worker to a Workday payroll pay group. You don't need to do this for third-party pay groups.
- To add payment elections for a worker that you can use in payroll, you must have:
- Configured payment election rules.
- Assigned the worker to a pay group.

What Happens If I Do Nothing?

You'll see no changes in your tenant.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/8086676.html

Core HCM - Effective Dating Enhancements for Job Profile

A

What's Changing

With 2024R2, Workday enhances your Job Profile setup data by adding effective dating to fields that previously weren't effective dated.

Additional Considerations

Updated Job Profile Fields

With this update, Workday adds effective dating to these fields:

Skills: Skills; Skill Level

Category Details: Critical Job; Public Job; Restrict to Country; Difficulty to Fill

Compensation: Comp Grade Profile

Qualifications: Languages; Responsibilities; Competencies; Trainings; Certifications; Education; Work Experience

Job Profile Reporting History: To provide consistent reporting and insights into how values of job profile fields change over time, Workday recreates the historical values for these job profile fields by copying the data to the most recent prior snapshot. When you report on job profiles using a specific effective date, the reports display the value for each field as of that effective date.

Note: Creating these snapshots can affect the default values generated from job profile data.

What Do I Need To Do?

Test to ensure that you get correct results.

- Use a report data source on the job profile business object to report on past, current, and future effective dates to ensure the values for the newly effective dated fields are what you expect. If the values are not what you expect, Workday recommends that you use the Submit Job Profile web service to update the fields to the expected value. A sample of this report is attached for your convenience.
- Run integrations using the newly effective dated job profile fields to ensure that the updates are what you expect.
- Test staffing and worker transactions using job profile data to ensure the transactions complete as you expect.

What Happens If I Do Nothing?

All job profile fields will automatically have consistent effective dating and the complete effective dated history.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/7927287.html

Core HCM - Enhancements to Change Job New User Experience

A

What's Changing

With this release, Workday continues to add additional capabilities to the simplified user interface for job changes including consolidated subprocesses. Workday introduces several enhancements to the simplified user interface for Change Job to support a streamlined experience and provide users with valuable information.

Additional Considerations

Additional Review and Submit Page

- The simplified summary page allows you to review changes across multiple pages before submitting the transaction, ensuring all information is accurate and complete.
- Users are able to add comments and attachments and submit the job change on the summarized review page.

Dynamic Behavior for Template Subprocesses: Based on details a user enters when completing a job change, Workday now dynamically hides or displays template subprocesses. This provides users with a more streamlined experience and enables them to see the most relevant information when completing a job change.

Workday also updates the subprocess page enabling you to edit the Supervisory Organization and Job Profile fields.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

Users will see these improvements when they launch a change job template with the simplified user interface enabled: Simplified user interface on the review and submit pages; Dynamically hidden or displayed subprocesses based on what a user enters; Embedded worklets displaying on subprocesses.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/8123366.html

Core HCM - Enhancements to Change Job New User Experience (cont.)

A

Additional Considerations

This enables you to flexibly adjust information on the job change without restarting the business process.

Embedded Worklets: With this update, Workday improves change job templates that have enabled the simplified user interface. Now Workday displays any embedded worklets on the subprocess steps of the Change Job business process. This feature enables you to view relevant analytic information within the context of the business process and provides a more consistent experience.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/8123366.html

Core HCM - Hire Employee Additional Information and Redesign

A

What's Changing

Workday 2024R2 redesigns the Search for Person and Search Results interfaces on the Hire Employee task by adding new fields to the search criteria and grouping fields into new sections. Workday also now displays Pre-Hire information, and previous role information for terminated workers in your search results.

Additional Considerations

Search for Person: Workday adds these new search criteria fields to the Search for Person interface of the Hire Employee task: Date of Birth; National ID; Previous Role Details: Location; Cost Center; Job Profile; Manager; Supervisory Organization

What Do I Need To Do?

- Access the Hire Employee task to view new interfaces.
- Access the Hire functional area of the Configure Optional Fields task to enable these optional fields in your search criteria and results:
  - Search Person: National ID Section
  - Search Person and Result: Cost Center of Previous Role
  - Search Person and Result: Job Profile of Previous Role
  - Search Person and Result: Location of Previous Role
  - Search Person and Result: Manager of Previous Role
  - Search Person and Result: Supervisory Organization of Previous Role
  - Search Person: Date of Birth

Community Link https://doc.workday.com/release-notes/en-us/hrcore/8083706.html

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Core HCM - Hire Employee Additional Information and Redesign (cont.)

A

Additional Considerations

Search Results: Workday also displays information for these fields in the Search Results interface of the Hire Employee task: Email; Phone Number; Job Profile; Location; Cost Center; Hire Date; Termination Date

These new fields respect existing domain security.

Note: Workday filters out active workers who don't have a termination date, and limit the results to 100.

What Happens If I Do Nothing?

You'll view design changes on the Search for Person interface of the Hire Employee task.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/8083706.html

Core HCM - Job Profile Skill Suggestions

A

What's Changing

With this release, Workday improves skill suggestions for job profiles by updating the APIs that provide the skill suggestions that Workday adds to the Suggested Skills for Job Profile report and the Edit Skills on Job Profile workbook.

Additional Considerations

Workday replaces the API that generates skill suggestions for job profiles with an API that uses generative AI to provide improved suggestions. For additional information about AI, see the Workday AI Fact Sheets.

What Do I Need To Do?

If you have already enabled Skills Cloud and selected the Populate Skill Suggestions for Job Profiles check box on the Maintain Skills and Experience Setup task, you will automatically receive the updated APIs. Workday will run a refresh job to update skill suggestions for all customers that use the new API. This process can take up to 3 days to complete as Workday moves to Preview and Production. Afterwards, skill suggestions will continue to refresh as they do today.

What Happens If I Do Nothing?

The new skills suggestions will be automatically available.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/7928036.html

Core HCM - Job Profile User Interface

A

What's Changing

With this release, Workday updates the job profile user interface and enhances several job profile fields.

Additional Considerations

With this release, Workday improves the job profile user interface to emphasize skills and have better defined groupings. Workday also adds reference information to the right panel (secured to the Set Up: Jobs and Positions and Job Profile: View domains in the Jobs and Positions functional area.) The enhancements apply to all step types on the Manage Job Profile business process.

What Do I Need To Do?

Evaluate your training materials to determine if they require updates because of the new user interface.

What Happens If I Do Nothing?

The updates will be automatically available.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/7928060.html

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Core HCM - Job Profile Web Services

A

What's Changing

With this release, Workday delivers updates to web services for job profiles.

Additional Considerations

Workday delivers a new Submit Job Profile web service as an initiating action on the Manage Job Profile business process. You can configure the security groups who can access the web service on the business process security policy for Manage Job Profile. The new web service enables you to create or edit job profiles in bulk, and use the Manage Job Profile business process.

Workday recommends that you use this new web service instead of the existing Put Job Profile web service, because the Put Job Profile web service only initiates and autocompletes the Manage Job Profile business process. We're disabling the Put Job Profile web service starting with v43.0.

When you create a new EIB, you can no longer use the Put Job Profile web service. You can use the Submit Job Profile web service instead.

Workday delivers v43.0 of the Get Job Profile web service, updating the fields to provide you with a consistent experience with the new Submit Job Profile web service.

What Do I Need To Do?

Configure the security for the new Submit Job Profile initiating action on the Manage Job Profile business process security policy.

What Happens If I Do Nothing?

If you don't set up the Submit Job Profile initiating action on the Manage Job Profile business process security policy, you won't be able to use the new web service.

If you don't use the new Submit Job Profile web service, and you continue to use the Put Job Profile web service, you won't be able to fully leverage the Manage Job Profile business process.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/8157461.html

Core HCM - Manage Data via Web Services

A

What's Changing

With 2024R2, Workday enhances our web services so that only managers or other users with access to the worker's position can manage data for workers.

Additional Considerations

Manage Data via Web Services

Workday enhances these web services so that only managers or other users with access to the worker's position can add, end, or view the relevant data for that worker:

- Assign Employee Collective Agreement
- End Collective Agreement
- End Additional Job
- Get Assign Employee Collective Agreement
- Maintain Employee Contracts
- Pre-Hire Put Applicant
- Terminate Employee (with End Additional Job as a subprocess)

This update aligns with user interface task behaviour and is automatically available from web service version 43.0.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/hrcore/8134560.html

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Core HCM - Manage Job Profile Business Process Reporting

A

What's Changing

With this release, Workday delivers more report fields for the Manage Job Profile business process, which you can use in custom reports. Workday secures these report fields to the Job Profile: Manage Job Profile EveHRCORE-98304nts security domain. Workday also delivers report fields on the Job Profile Business Object secured to the Public Reporting Items.

Additional Considerations

Workday delivers 35 new, event-based report fields on the Manage Job Profile Event and Job Profile business objects that you can use for audit reporting and to customize routing and validations for the Manage Job Profile business process.

The event based report fields fall into these categories:

- Current: The value for the field before you initiate the Manage Job Profile event.

  Example: Job Profile Skills - Current. If there's no current value, the field returns a blank value.

- Proposed: The proposed value on the Manage Job Profile event.

  Example: Job Profile Skills – Proposed. If there's no proposed value, the field returns the current value.

What Do I Need To Do?

Review any custom reports that you have already created using these business objects and update reports as needed.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/hrcore/8133284.html

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Core HCM - Overview Tab

A

What's Changing

Workday renames the HR Partner Overview tab to Overview.

Additional Considerations

Workday renames the HR Partner Overview tab to Overview.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/orgmod/8154696.html

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Core HCM - Security for Personal Information Items

A

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

Note: Please refer to the community link for extensive list of additional considerations

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

This feature will be Automatically Available in Production with Workday Release 24R2

Community Link https://doc.workday.com/release-notes/en-us/hrpersoninf/8130946.html

Core HCM - Security for Worker ID (REST) and Employee ID Report Fields

A

What's Changing

Workday updates the security for the Worker ID (REST) and Employee ID report fields.

Additional Considerations

Workday now secures 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
- 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?

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

What Happens If I Do Nothing?

Nothing. This feature is automatically available.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/8165385.html

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Core HCM - Maintain Change Job Templates Redesign

A

What's Changing

Workday makes the Maintain Change Job Templates task easier to understand and navigate with a complete redesign of the user interface. This makes the process for creating and maintaining Change Job templates more intuitive and streamlined.

Workday redesigns the Maintain Change Job Templates task, delivering a new user interface that makes the process for creating a template more intuitive and streamlined. Each template is its own tab that you can edit directly, and you can easily toggle to a list view that displays all of the templates.

Additional Considerations:

This feature may impact your training materials.

What Do I Need To Do?

You don't need to do anything. The user interface will automatically update.

What Happens If I Do Nothing?

Administrators who access the Maintain Change Job Templates task will see a new user interface.

Community Link https://community.workday.com/node/1184917?check_logged_in=1

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Core HCM - Effective Dating for Service Dates

A

What's Changing

With this release, Workday enables you to add effective dates to service date changes using the service dates web service.

Additional Considerations:

Edit Service Dates Web Services

Workday updates the Edit Service Dates web service to support the new Effective Date field.

Edit Service Dates Web Services v43.0 and v42.0

Workday updates v43.0 of the Edit Service Dates web service to support the new Effective Date field:

- In your Preview tenant, you must specify an Effective Date.
- In your Production tenant, you must specify an Effective Date if you've opted in to the feature on the Maintain Feature Opt-Ins task. Otherwise, you must leave the Effective Date field blank.

What Do I Need To Do?

If you used v42.0 of the Edit Service Dates web service in your Preview tenants, you must update the web service to v43.0.

If you want to set the Effective Date for service dates in Production, and you've opted-in to the feature, use v43.0 of the Edit Service Dates web service.

What Happens If I Do Nothing?

If you previously used v42.0 of the Edit Service Dates web service in your Preview tenants, your web service request will be invalid because the Effective Date field is no longer available.

If you haven't used v42.0 of the web service, there will be no change.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/7186841.html

Core HCM - Effective Dating for Service Dates (cont.)

A

Additional Considerations:

Workday updates v42.0 of the Edit Service Dates web service to move support for the new Effective Date field to v43.0 of the web service:

- In your Preview tenant, the Effective Date field no longer displays in the web service. Workday defaults today's date or a future-dated hire date for the Effective Date field. We recommend that you use v43.0 of the web service instead to specify effective dates.
- In your Production tenant, there's no change to the Edit Service Dates web service. We recommend that you use v43.0 of the web service to specify effective dates, if you've opted in to the feature.

Community Link

https://doc.workday.com/release-notes/en-us/hrcore/7186841.html

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Core HCM - Related Actions Icon Enhancement

A

What's Changing

With this release, Workday delivers an updated Related Actions icon with a tooltip that improves accessibility.

Additional Considerations

N/A

What Do I Need To Do?

The new color and style is enabled by default. To revert to the orange Related Actions icon, access the Edit Tenant Setup - System task and select Opt-out for Related Actions Charms Component Uplift. This option will be deprecated in the 25R1 release.

What Happens If I Do Nothing?

The Related Actions icon defaults to the new blue color, style, and tooltip functionality. We will add this new look to Search results in a future release.

Community Link https://doc.workday.com/release-notes/en-us/uiplatform/8119307.html

Core Payroll

Core Payroll 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.

Core Payroll

- Custom Validation for On-Demand Payments
- Object Transporter for Payroll
- Payroll Calculation Processing Report
- Payroll Processing
- ADP Check Print Integration

Core Payroll - Custom Validation for On-Demand Payments

A

What's Changing

With this release, you can configure custom validations for on-demand payments.

Additional Considerations

You can now include rules (Example: Payment date has to be equal or greater than the current date) when you create custom validations for on-demand payments using the Maintain Custom Validations task.

To provide better clarity, Workday renames the Off-Cycle Payment category to On Demand Payment.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/paywdcore/8013261.html

Core Payroll - Object Transporter for Payroll

A

What's Changing

In this release, Workday delivers Payroll to the new Object Transporter.

Additional Considerations

With this update, Workday enables you to migrate these Payroll objects between tenants using the new Object Transporter:

- Aggregate Calculations
- Arithmetic Calculations
- Advanced Lookup Tables
- Balance Periods
- Build Date Calculations
- Conditional Calculations
- Constant Date Calculations
- Constant Value Calculations
- Date Difference Calculations
- Date Extract Calculations
- Date Increment/Decrement Calculations
- Deductions
- Earnings
- Gross-Up Configuration
- Gross-Up Priorities
- Input Value Lookup Tables
- Instant Set Comparison Calculations
- Instance Value Calculations
- Logic Calculations
- Lookup Calculations
- Lookup Tables

What Do I Need To Do?

If you have access to the customer central tenant, you can create configuration packages with payroll implementation types.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/paywdcore/7337992.html

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Core Payroll - Object Transporter for Payroll (cont.)

A

Additional Considerations

- Maintain Audit Configuration - Results by Period
- Maintain Payroll Audit Configurations - Compare Periods
- Maintain Payroll Proration Overrides
- Pay Accumulations
- Payroll Action Reason
- Payroll Audit Configurations
- Payroll Audit Run Group
- Payroll Audit Worker Eligibilities
- Pay Balances
- Pay Group Automatic Assignment Rules
- Pay Group Rules
- Payroll Input Templates
- Payroll Proration Overrides
- Payroll Prism Prove Mappings
- Pay Results CRF Mappings
- Pay Results CRF Mappings - Balance Period Mappings
- Pay Retro Calculation Processing Configurations
- Pay Run Groups
- Payroll Register by Period Configurations
- Payroll Register Task Configurations
- Related Calculations
- Step-Based Calculations
- Step-Based Calculation Condition
- Step-Based Condition Groups
- Value Comparison Calculations
- Voluntary Deduction Configuration

Community Link https://doc.workday.com/release-notes/en-us/paywdcore/7337992.html

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Core Payroll - Object Transporter for Payroll (cont.)

A

Additional Considerations

What to know about migrating Payroll objects

- You can't migrate snapshots later than today's date, only the most recent snapshot that is today's date or earlier.
- You can only migrate a pay component with a package effective date that is later than the earliest snapshot date.
- You must migrate pay component related calculations either before you migrate or as you migrate generic calculations.
- You must migrate pay component related calculations name changes before you migrate the pay component or as part of a configuration package that includes that generic calculation.
- When you remove optional values in your calculations, then migrate those objects to a new tenant where that value already exists, the empty value doesn't migrate. Workday recommends you wait to remove the optional values until after you migrate to the new tenant.

Community Link https://doc.workday.com/release-notes/en-us/paywdcore/7337992.html

Core Payroll - Payroll Calculation Processing Report

A

What's Changing

With this release, Workday now processes history payments when you run the Payroll Calculation Processing Report.

Additional Considerations

You can now apply these mass actions for the selected history payment results on the Payroll Calculation Processing Report:

- Cancel
- Complete
- Recalculate

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/paywdcore/7624247.html

Core Payroll - Payroll Processing

A

What's Changing

Workday enhances and consolidates payroll processing.

Additional Considerations

Workday enhances the performance of the Run Pay Calculation task. You might notice improved performance when you:

- Have a large number of terminated workers in your tenant.
- Run a pay calculation for a small number of workers with any option selected for Employees to Calculate and for pay group details configured with any of these payroll processing statuses:
  - Terminated with One-time Compensation Payments
  - Terminated with One-time Payroll Inputs
  - Terminated with One-time Payroll Input for Earnings
  - Terminated with Ongoing Payroll Input
  - Terminated with Retro Differences

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/paywdarch/7652406.html

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Core Payroll - Payroll Processing (cont.)

A

Additional Considerations

With this release, Workday improves general performance. You may experience improved performance when using these tasks:

- Delete by Batch ID
- Delete External Payroll Input by Batch

Also, when you recalculate a payroll result using these methods:

- Manual
- On-Demand
- Regular

Community Link https://doc.workday.com/release-notes/en-us/paywdarch/7652406.html

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Core Payroll - ADP Check Print Integration

A

What's Changing

Workday continues to enhance the ADP Check Print integration.

Additional Considerations

To help ensure authorized access for documents, Workday now secures the ADP Check Print (Enhance Performance) integration template to the Domain Process: Payroll Settlement domain in addition to its existing domains.

Workday updates the ADP Check Print integration to now include Employee Header Record 16 for workers, helping you comply with ADP specifications.

Workday adds these new integration field attributes to the Payment Group Data section of the ADP Check Print (Enhance Performance) integration template, enabling you to override a company's name and address:

- DBA Name
- Alternate Address

You can use the DBA Name integration field attribute for the name that your company operates under if the name is different from the company's legal registered name.

What Do I Need To Do?

Workday recommends that you reach out to ADP to help ensure that they process the Employee Header Record 16.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/paywdi/7810120.html

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Financial Management

Financial Management 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.

Financial Management

Accounting Center
- Access to Prism Data in Financial Management - Accounting Center
- Accounting Source Analytics Data Source Security Configuration
- Detailed Accounting Process
- Tax Reporting on Financial Management - Accounting Center Summary Journals
- Validation for Primary Worktag Balancing

Banking & Settlement
- Payment Acknowledgement Status
- Settlement Run Accounting Performance

Business Asset
- Stability Enhancements for Asset Accounting
- Validation on Asset Transfers

Cash Management
- Normalized Cash Forecasting Report Fields

Customer Accounts
- Clear Open Accounts Receivable with Customer Payments
- Configurable Entity Activity Codes
- Create Customer Payments and Deposits from Bank Statements with Invoice Prefixes
- Customer Activity Summary Performance Improvement
- Customer Payment Auto-Application Performance Improvements
- Remit-To Address Settings on Customer Refunds

Financial Management

Customer Accounts
- Aging Summary Cards on Manage Project Billing Transactions Task
- Custom Validations on Customer Invoice Proposals
- Export Project Billing Transactions to Excel
- Mass Action for Excluding Transactions from Prepayment
- Mass Modification of Amounts for Non-Labor Transaction Sources
- Prevention of Concurrent Transaction Changes
- Project Phases and Tasks for Fixed Fee and Value-Based Customer Contract Line Types
- Search Enhancements in Manage Project Billing Transactions Task
- Split Project / Phase / Task Column into Phase and Task Columns

Expenses
- Credit Card Transactions
- Enhanced Security for Travel Booking Data
- Expense Email Ingestion
- Hide Itemization for Expense Item

Financial Accounting
- 1099 Payment Details
- Allocation Plan Web Services
- Delete Recurring Journal Templates
- Intercompany Transaction Performance
- Operational Journal Entry Validations

Financial Management

Financial Aid
- Aging Receivable Reports with Custom Aging Groups
- Cost Item Column on Student Self-Service Tasks
- Financial Aid Reaction Flags
- Mass Cancel Student Awards
- Midyear ISIR Progression with Undergraduate and Graduate Levels
- Packaging for Undergraduate and Graduate Programs in the Same Award Year
- Parent PLUS Student Awards
- PLUS Loan Matching Enhancements
- Refresh ISIR and NSLDS Transactions
- Return of Title IV Reporting
- Satisfactory Academic Progress (SAP) Data on Student Profiles
- Send Back Return of Title IV Worksheets
- Visibility of SAP Appeal Questionnaire Responses
- Financial Aid Action Items

Grants
- Eligible Investigator Usability
- Layouts for Financial Management - Grants Tasks and Reports
- Letter of Credit Drawdown Performance and Usability

Inventory
- Chain of Custody - Additional Tracking Number Improvements

Financial Management 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.

Financial Management

Procurement

- Checkout Requisition Performance Improvements
- Company Currency Fields For Editing and Reviewing Procurement Documents
- Mass Change Buyer on Purchase Order
- Procurement Tasks Performance Improvements
- Setup: Item Substitutes with Different Base Unit of Measure
- Spend Management Tasks Performance Improvements

Projects

- Custom Validations and Business Processes for Ad Hoc Project Transaction Web Services
- Worker Absence and Other Project Allocation in Resource Forecaster

Supplier Accounts

- Commodity Codes on Non-PO Supplier Invoices

Supplier Contracts

- Unsupported Security Group Access to Supplier Contract Reporting Data Sources

Accounting Center

Accounting Center - Access to Prism Data in Accounting Center

A

What's Changing

With Workday 2024 R2, Workday is modifying how you access Prism data in Accounting Center for processing batches and resolving errors. You only need access to the respective Accounting Center security domain for the task without also needing access to the Prism Data Sources of the Accounting Source tables and datasets.

Also, when you create an accounting source, Workday will no longer automatically populate these Accounting Center security domains on the Prism Data Sources:

- Process: Accounting Center
- Set Up: Accounting Center - Maintain

Additionally, Workday now automatically populates the Prism: Default to Dataset Access domain on the Prism Data Sources.

Prism Data Source security access is still required for reporting purposes.

Additional Considerations

Access to Accounting Center Data

Accounting Center tasks and processing accesses data from Prism tables and datasets for an accounting source. To support Accounting Center tasks and processing, you only need access to the Accounting Center security domain, but no longer also need access to Prism Data Sources associated with the Prism tables and datasets of the Accounting Source.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/finac/7684931.html

Accounting Center - Accounting Source Analytics Data Source Security Configuration

A

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

Edit Accounting Source Prism Data Source Security Task

Workday now delivers 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.

View Accounting Source Prism Data Source Security Report

Workday now delivers 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?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/finac/8056116.html

Accounting Center - Detailed Accounting Process

A

What's Changing

With Workday 2024 R2, Workday makes architectural changes to the detailed accounting process.

Additional Considerations

View Error Details Page

To enhance error processing for many-to-1 transactions with more than 1,000 records or journal lines, Workday updates the View Error Details page by adding these new columns that display a message when the transaction or journal is in error:

- Transaction Display Exceptions in the Configured Header and Lines grid.
- Journal Display Exceptions column in the Expected Detailed Accounting Journals grid.

Detailed Accounting

Workday now delivers a validation message that prevents you from processing more than 300,000 records per transaction in Detailed Accounting.

For optimal performance and error handling, Workday recommends:

- Splitting the transaction into smaller sets of records and balancing each smaller transaction if approaching this limit. Example: Processing 5 transactions with each transaction containing 20,000 records will perform better than processing 1 transaction with 100,000 records.
- Processing a maximum of 20,000 records per transaction. Transactions above this will impact performance.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/finac/7791753.html

Accounting Center - Detailed Accounting Process (cont.)

A

Additional Considerations

For more information, see the Using Transaction Grouping ID section in Accounting Center Configuration Guide on Community.

Detailed Accounting System Dataset

Workday now no longer publishes the <AS>_DTL_SYS_UnprocessedForBatch system dataset.

Journal Line Rules

Workday now supports up to 5,000 Journal Line Rules across all Snapshots in all Accounting Groups for an accounting source.

AC_Query_Key System Field

With this update AC_Query_Key system field is not required and will therefore have a NULL value.

Validation on Accounting Center Detailed Accounting Event

Workday displays a validation and prevents you from running the Accounting Center Detailed Accounting Event if the user account defined on the business process is either disabled, expired, or locked.

Community Link https://doc.workday.com/release-notes/en-us/finac/7791753.html

Accounting Center - Tax Reporting on Accounting Center Summary Journals

A

What's Changing

Workday continues to enhance Accounting Center functionality by enabling you to report on transaction taxes on accounting center summary journals.

Note:

- *Workday doesn't calculate taxes, but supports reporting on them when accounted for through Accounting Center processing.*
- *Workday only supports reporting on transaction taxes, not withholding taxes.*

Additional Considerations

Edit Accounting Source Task

Workday updates the Journal Line Rules tab on the Edit Accounting Source Configuration task by adding these new fields:

• Enable Tax Details. Select this option to report on transaction taxes on the resulting journal lines.

• Tax Details. When you select the Enable Tax Details option, you must define the required tax attributes, including Taxable Transaction Date, Tax Type, Taxable Amount, and, optionally, the Tax Recoverability Type.

Note: The value you enter in the Tax Recoverability Type field overrides the value that defaults from the Tax Recoverability worktag.

What Do I Need To Do?

Enable the functionality at the journal line rule and then configure the required fields in the Tax Details column

For each journal line rule where the Enable Tax Details option is enabled, ensure you have these worktag types configured in the Worktags column: Tax Applicability, Tax Code, Tax Rate

What Happens If I Do Nothing?

Your Accounting Source processing will continue as usual. The resulting Accounting Center Summary Journals will not be available for transaction tax reporting.

Community Link https://doc.workday.com/release-notes/en-us/finac/7012020.html

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Accounting Center - Validation for Primary Worktag Balancing

A

What's Changing

When Primary Worktag Balancing is enabled for a Tenant, Workday ensures that journal lines in Detailed Accounting are balanced by the primary worktag.

Additional Considerations

Workday now delivers a validation that prevents you from creating journal lines in Detailed Accounting that are not balanced by primary worktags.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A.

Community Link https://doc.workday.com/release-notes/en-us/finac/8204348.html

Banking & Settlement

Banking & Settlement - Payment Acknowledgement Status

A

What's Changing

With this 2024R2 release, Workday enhances payment acknowledgement processing logic to update the Completed payment status to Rejected when payments or the related electronic payment groups (EPRG) aren't reconciled.

Additional Considerations

Workday now updates the payment status to Rejected for Completed payments when the payment acknowledgement status is Rejected.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/finset/7810165.html

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Banking & Settlement - Settlement Run Accounting Performance

A

What's Changing

With the 2024R2 release, Workday has improved the performance of accounting processing for settlement runs so that you can complete high volume of small payments more quickly and efficiently.

Additional Considerations

With this update, Workday improves the performance of accounting processing for settlement runs so that you can complete high volume of small payments more quickly and efficiently.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

Your accounting processes will complete faster.

Community Link https://community.workday.com/node/7923338

Business Asset

Business Asset - Stability Enhancements for Asset Accounting

A

What's Changing

With the 2024R2 release, Workday improves the asset accounting engine, enabling you to experience better stability when creating and maintaining assets. This improves the health of your tenant when creating assets.

Additional Considerations

Workday updates how we assign accounting to assets, improving stability when allocating system resources.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/finast/7006960.html

Business Asset - Validation on Asset Transfers

A

What's Changing

With the 2024R2 release, for assets that you've transferred in from another company, Workday now prevents you from recording intracompany asset transfers that predate the transfer-in date.

Additional Considerations

Workday adds a new validation on these tasks to ensure that the transaction effective date is on or after the intercompany transfer-in date for the asset:

- Transfer Asset
- Transfer Assets

Workday has also updated these web services with the new validation:

- Bulk Import Transfer Asset
- Transfer Asset

What Do I Need To Do?

To use the web service, update the web service to v43.0.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/finast/7727982.html

Cash Management

Cash Management - Normalized Cash Forecasting Report Fields

A

What's Changing

With this update, Workday suppresses some class report fields from business objects to simplify custom report creation for cash forecasts.

Additional Considerations

Workday suppresss report fields from these business objects so they're no longer available for custom report creation:

- Cash Forecast - Bank Statement Balance (All)
- Cash Forecast - Bank Statement Line (All)
- Cash Forecast Customer Invoice Document
- Cash Forecast - Expense Report
- Cash Forecast - Supplier Invoice Document
- Cash Forecast Transaction

The suppressed fields include duplicate fields or fields that aren't applicable to the business object.

See the complete list of report fields in the attached Excel spreadsheet.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/fincsh/7852102.html

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Customer Accounts

Customer Accounts - Clear Open Accounts Receivable with Customer Payments

A

What's Changing

With the 2024R2 release, Workday now enables you to record customer payments with a payment amount of 0, so that you can quickly match multiple invoices, adjustments, and payments in a single transaction.

Additional Considerations

Workday updates these tasks, enabling you to set the Total Payment Amount field to 0 when creating or editing customer payments:

- Edit Customer Payment
- Record Customer Payment

Workday also updates the Apply Customer Payment task, enabling you to apply customer payments with customer invoices and invoice adjustments netting to 0.

Workday removes these tasks from the Customer Payment related actions menu on View Customer Payment for Invoices:

- Create Customer Deposit
- Update Remittance Advice

After you submit your zero-amount payment application, Workday now creates a customer payment with:

- Payment Status: Complete
- Application Status: Fully Applied

What Do I Need To Do?

Workday recommends that you use this feature to offset multiple invoices and adjustments that aren't tied in a single transaction in place of:

- Offsetting individual invoices and credit adjustments on the Perform Customer Invoice Maintenance task.
- Recording a customer payment for a payment amount of 0.01 or reapplying a previously applied payment.

What Happens If I Do Nothing?

- You can continue to offset individual invoices on the Perform Customer Invoice Maintenance task.
- If you don't want to record customer payments with a payment amount of 0, you can create custom validations for Customer Payment on the Maintain Custom Validations report.

Community Link https://doc.workday.com/release-notes/en-us/fincust/7870843.html

Customer Accounts - Configurable Entity Activity Codes

A

What's Changing

With the 2024R2 release, Workday enables you to configure multiple entity activity codes by country for your companies, customers, and suppliers.

Additional Considerations

Workday has delivered below new tasks for this configuration:

- *Maintain Entity Activity Code Types:* to configure entity activity code types for a country.
- *Maintain Entity Activity Codes*: to configure entity activity codes per code type.
- *View Entity Activity Code Types*: to view all available entity activity code types.
- *View Entity Activity Codes:* to view available entity activity codes by the code type that you select.

Workday has also delivered a new report field, Assigned Entity Activity Code, on the Company, Customer, and Supplier business objects that you can use in custom reports to drill down on the details of the entity activity codes.

Workday also added report fields Entity Activity Code, Entity Activity Code Country, Entity Activity Code Description, Entity Activity Code Type, Inactive Entity Activity Code on the Entity Activity Code business object to use in custom reports. These report fields are secured to the Public Reporting Items domain.

What Do I Need To Do?

On the Maintain Entity Activity Code Types task, configure an entity activity code type for a country.

On the Maintain Entity Activity Codes task, add 1 or more entity activity codes for the configured entity activity code type.

Assign a new entity activity code to a company, customer, or supplier.

What Happens If I Do Nothing?

If you don't configure entity activity code types and entity activity codes, you won't be able to assign entity activity codes to a company, customer, or supplier.

Community Link https://doc.workday.com/release-notes/en-us/fincust/6973727.html

Customer Accounts - Create Customer Payments and Deposits with Invoice Prefixes

A

What's Changing

With the 2024R2 release, Workday enables you to configure invoice prefixes in customer payment rule sets and populates associated invoice instances and remit-from customers on remittance advice when you record customer payments from the bank statement lines. This will help you more accurately search for customer invoice numbers when creating customer payments from bank statement lines.

Additional Considerations

For the Invoice Lookup Prefix, prefix values should have at least 3 characters to use the mapping table. Multiple prefix can be set up.

Workday has an order for determining the Remit-From Customer.

- First, the job will check for a default remit-from customer on the Customer Payment Rule
- Second, the job will perform an exact match lookup on invoice number and Customer ID.
- Third, the job will do an advanced lookup on the customer mapping table using the invoice prefix(es) configured on the Customer Payment Rule Set for that bank account.

You can only add the addenda field as criteria once on the copy bank statement lines to customer payment section on a customer payment rule.

You can add the addenda field as criteria more than once on the bank statement filter criteria section on a customer payment rule.

What Do I Need To Do?

This feature will need to be configured by creating a rule within the Customer Payment Rule Set task.

What Happens If I Do Nothing?

If you don't configure an invoice prefix value rule when you create or edit a customer payment rule set, Workday won't generate a payment that identifies related invoices in a string of text from your bank statement when running the Schedule Customer Payment from Bank Statement Line task.

Community Link https://doc.workday.com/release-notes/en-us/fincust/7712157.html

Customer Accounts - Create Customer Payments and Deposits with Invoice Prefixes (cont.)

A

Additional Considerations

Lookups on the mapping table that include "and" conditions are not supported. For example: remit-from lookup value = ABC "and" XYZ, is not supported.

If the job uses the mapping table to determine the remit-from customer, it will populate it based on the first match on the prefix it finds. You cannot specify an order in the remit-from table for the job to search through.

You can schedule the Customer Payment from Bank Statement Line job to run for multiple bank accounts, however it will only run for those bank accounts that have a customer payment rule set attached to them.

The mapping table only supports the Create Customer Payments and Deposits from Bank Statement Lines feature. It does not support any other functionality, such as Lockbox.

Avoid configuring rules that will have the job search through all the customer payment remittance advice types; it's not performant.

Left-hand side remittance is not supported for: On-behalf-of company payments, credit invoice adjustments, and credit-rebill customer invoices.

Community Link https://doc.workday.com/release-notes/en-us/fincust/7712157.html

Customer Accounts - Customer Activity Summary Performance Improvement

A

What's Changing

With the 2024R2 release, Workday has added a warning message to the Customer Activity Summary report when there are too many results.

Additional Considerations

Workday adds a warning message to the Customer ActivitySummary report when there are too many results. Workday recommends you refine your search by selecting filter criteria other than Company.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/fincust/8097612.html

cognizant

Customer Accounts - Customer Payment Auto-Application Performance Improvements

A

What's Changing

With the 2024R2 release, Workday has improved the performance of the Customer Payment Auto-Application job when you process customer payments with large payment applications and credit adjustments with large volumes of customer invoices

Additional Considerations

This update is available on Auto-Apply Customer Payments task & Schedule Auto-Apply Customer Payments task.

When a customer payment is being processed, it is locked by the Customer Payment Auto-Application job and you cannot perform few tasks and web services.

Workday has also added a new validation message "The Auto Apply Job is processing the customer payment. Try again later".

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/fincust/8066818.html

Customer Accounts - Remit-To Address Settings on Customer Refunds

A

What's Changing

With the 2024R2 release Workday now enables you to select the payee remit-to address when creating customer refunds.

Note: To use this enhancement, you must opt in to the Customer Refunds Optimization feature on the Maintain Feature Opt-Ins report. *After you opt-in to this feature, you can't opt-out.*

Additional Considerations

You can select a different remit-to address using these new prompt filters or leave it blank:

- Default Remit-To Address
- All Remit-To Addresses

Workday delivers a new Payee Remit-To Address report field on the Customer Refund business object (secured to the Public Reporting Items domain) that you can use in custom validations or custom reports when you copy the Find Customer Refunds standard report.

What Do I Need To Do?

Configure a custom validation for customer refunds using the Payee Remit-To Address report field to ensure that customer refunds have the payee remit-to address specified.

Copy the Find Customer Refunds standard report to create a custom report for customer refunds that populates the Payee Remit-To Address value when available.

Copy the Find Customer Refund Payments standard report to create a custom report for customer refund payments that populates the Remit-To Address value when available.

Community Link https://doc.workday.com/release-notes/en-us/fincust/6973720.html

Customer Accounts - Remit-To Address Settings on Customer Refunds (cont.)

A

Additional Considerations

Before the customer refund is approved in the review and revise business process steps, Workday enables you to change the payee remit-to address, automatically populates an updated address when you update the payee remit-to address on the customer profile or displays a validation message prompting you to change the address when the payee remit-to address is no longer valid.

What Happens If I Do Nothing?

When you create customer refunds, Workday automatically populates the Payee Remit-To Address field with the payee's latest effective address with remit-to usage.

When you approve customer refunds, Workday uses the payee's latest effective address with remit-to usage to generate the refund payment through settlement run and print the check when the refund payment is settled.

Community Link https://doc.workday.com/release-notes/en-us/fincust/6973720.html

Customer Contracts

Customer Contracts - Aging Summary Cards on Manage Project Billing Transactions Tasks

A

What's Changing

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

Additional Considerations

N/A

What Do I Need To Do?

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

What Happens If I Do Nothing?

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

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

Customer Contracts - Custom Validations on Customer Invoice Proposals

A

What's Changing

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

Additional Considerations

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

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

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

What Do I Need To Do?

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

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

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

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

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Customer Contracts - Custom Validations on Customer Invoice Proposals (cont.)

A

What Happens If I Do Nothing?

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

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

cognizant

Customer Contracts - Export Project Billing Transactions to Excel

A

What's Changing

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

Additional Considerations

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

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

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

What Do I Need To Do?

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

What Happens If I Do Nothing?

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

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

Customer Contracts - Mass Action for Excluding Transactions from Prepayment

A

What's Changing

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

Additional Considerations

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

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

What Do I Need To Do?

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

What Happens If I Do Nothing?

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

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

Customer Contracts - Mass Modification of Amounts for Non-Labor Transaction Sources

A

What's Changing

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

- Supplier Invoice
- Expense
- Misc Expense

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

Additional Considerations

- Post this release, by default all 4 transactions sources (time, supplier invoice, expense and misc expense) are enabled for mass modify.
- In order to disable mass modification for any one of the transaction sources, use Set Up Project Billing Configuration task.
- In order to disable mass modification for all the transaction sources, use Configure Optional Fields task.

What Do I Need To Do?

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

What Happens If I Do Nothing?

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

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

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Customer Contracts - Prevention of Concurrent Transaction Changes

A

What's Changing

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

Additional Considerations

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

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

In the Manage Project Billing Transactions task:

- During Submit or Create Invoice Proposal, if any of the selected transactions have been modified by another user then Workday will display a warning.
- If any of the selected transactions on the Details or Summary pages, have a billing status of Billed or Billing in Progress, or have been submitted for invoicing, then Workday will display a warning and omit those transactions from the action.

What Do I Need To Do?

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

What Happens If I Do Nothing?

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

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

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Customer Contracts - Project Phases and Tasks for Fixed Fee and Value-Based Customer Contract Line Types

A

What's Changing

With the 2024R2 release, you can add project phases and tasks on fixed fee project and value-based project customer contract lines.This capability already exists for project time and expense contract lines and is now extended to fixed fee project and value-based project lines.

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

Additional Considerations

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

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

What Do I Need To Do?

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

What Happens If I Do Nothing?

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

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

Customer Contracts - Search Enhancements in Manage Project Billing Transactions Tasks

A

What's Changing

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

Additional Considerations

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

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

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

What Do I Need To Do?

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

What Happens If I Do Nothing?

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

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

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Customer Contracts - Split Project / Phase / Task Column into Phase and Task Columns

A

What's Changing

With the 2024R2 release, Workday split the Project / Phase / Task column in the Manage Project Billing Transactions and Edit Customer Invoice Proposal tasks into separate Phase and Task columns.

Additional Considerations

On the Manage Project Billing Transactions task's transaction details view:

• When viewing all transactions, we replace the single Project / Phase / Task column with separate Phase and Task columns.

• When viewing transactions by transaction source, we replace the single Project Plan Task column with separate Phase and Task columns on the Time tab.

• When viewing transactions by transaction source, we replace the single Project / Phase / Task column with separate Phase and Task columns on these tabs:

- Expense
- Supplier Invoice
- Misc Expense

On the Edit Customer Invoice Proposal task, we replace the single Project / Phase / Task column with separate Phase and Task columns on the Invoice Lines tab.

What Do I Need To Do?

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

What Happens If I Do Nothing?

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

Community Link

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

Expenses

Expense - Credit Card Transactions

A

What's Changing

With the 2024R2 release, Workday continues to make enhancements to credit card transactions by updating web services and removing fields that are no longer needed.

Additional Considerations

Workday has updated these web services:

- Import Credit Card Transactions
- Put Expense Credit Card Transactions

Enabling you to accept updates on these fields from your financial institutions when credit card transactions are in draft, new, and pending status in expense reports:

- Air Routing
- Arrival Date
- Charge Description Line 1
- Class of Service
- Daily Rate
- Departure Date
- Destination City
- Destination Country

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/finexp/8160605.html

Expense - Credit Card Transactions (cont.)

A

Additional Considerations

- Destination State
- Domestic
- Merchant Tax ID
- Number of Days
- Origination City
- Origination Country
- Origination State
- Reference Number
- Ticket Number

With the retirement of Workday's Secured Credit Card Environment, Workday has removed:

- The Maintain Credit Card Number button from the View Credit Card report.
- The Token Number field from all Workday tasks, reports, and web services.

Community Link https://doc.workday.com/release-notes/en-us/finexp/8160605.html

Expense - Enhanced Security for Travel Booking Data

A

What's Changing

With the 2024R2 release, Workday has enhanced security for travel booking files imported from travel management companies, enabling you to provide users with only unconstrained access to travel booking files.

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*
- *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 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 https://doc.workday.com/release-notes/en-us/finexp/8079700.html

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Expense - Enhanced Security for Travel Booking Data (cont.)

A

Additional Considerations

Workday delivers 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.

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

- 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 https://doc.workday.com/release-notes/en-us/finexp/8079700.html

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Expense - Expense Email Ingestion

A

What's Changing

With the 2024R2 release, Workday enables you to more easily troubleshoot emailed receipts that weren't ingested by making enhancements to the Expense Email Ingestion By Date Range report.

Additional Considerations

Workday has added new messages in the Cause of Failure column in the Expense Email Ingestion By Date Range report.

- When an email address isn't associated with a worker in Workday, then Workday displays: Email is not from an approved sender.
- When an email address is associated with a worker but belongs to a pre-hire, contingent worker or external committee member, Workday displays: Only employees and contingent workers can email expense receipts.
- When an email address is associated with multiple workers, Workday displays: More than 1 worker has the same email address.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/finexp/8156464.html

Expense - Hide Itemization for Expense Item

A

What's Changing

Workday enables administrators to hide the itemization option during expense item configuration, resulting in the Itemize button not displaying in expense report lines for expense submitters. This reduces accidental itemizations on expense reports and helps expense submitters more quickly submit expense reports. This also reduces expense report processing costs by eliminating accidental itemizations that approvers would otherwise need to sift through.

Additional Considerations

Workday adds a new Hide Itemization check box to these tasks, enabling you to select the expense items to exclude from itemization:

- Create Expense Item
- Edit Expense Item

You can also view your selections for each expense item in the View Expense Item report.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/finexp/8025901.html

Financial Accounting

Financial Accounting - 1099 Payment Details

A

What's Changing

With this release, Workday delivers a new task and new reports that you can use instead of the 1099 Report to review 1099 payees and their payment details before creating 1099 runs.

Additional Considerations

To enable you to review 1099 payees and their payment details before you create 1099 runs, Workday delivers this new task and these reports (secured to the Reports: Supplier Accounts 1099 – USA domain):

Task:

- Create 1099 Payment Details: This task creates 1099 Payment Details business objects.

What Do I Need To Do?

- Run the Create 1099 Payment Details task after you create new 1099 payments or adjustments to update 1099 payment details.
- When you run the Create 1099 Payment Details task for the same company and tax year, wait until the task completes to run it again.

Note: Workday recommends that you don't schedule or run the 1099 Payment Details report directly, as this might return incomplete information.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/fintax/6687624.html

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Financial Accounting - 1099 Payment Details (cont.)

A

Additional Considerations

Reports:

- 1099 Payment Details: This report enables you to view 1099 payment details. You can only access the report from the Create 1099 Payment Details task and the Find 1099 Payment Details report.

- Find 1099 Payment Details: This report enables you to access previously generated 1099 Payment Details reports.

Workday also enables you to create 1099 runs from the Create 1099 Payment Details task.

Community Link https://doc.workday.com/release-notes/en-us/fintax/6687624.html

Financial Accounting - Allocation Plan Web Services

A

What's Changing

Workday updates tenant setup web services in Financials with new fields to provide support for a future release.

Additional Considerations

Workday adds these new fields to the Get Tenant Setup - Financials and Put Tenant Setup - Financials web services:

- AP Transaction Line Group Sequence Generator
- AP Transaction Sequence Generator

Note: These new fields aren't yet operational. Workday intends to deliver the functionality in a future update.

What Do I Need To Do?

Nothing at this time. You can configure these fields but won't be able to use them until the full feature releases in a future update.

What Happens If I Do Nothing?

No impact if you do nothing.

Community Link https://doc.workday.com/release-notes/en-us/fincls/8155947.html

Financial Accounting - Delete Recurring Journal Templates

A

What's Changing

With the 2024R2 release, Workday now enables you to delete recurring journal templates with no generated journals.

Additional Considerations

Workday delivers a new Delete Recurring Journal Template task (secured to the Process - Journals Core domain) that you can use to delete templates that haven't generated any journals.

You can access this task from the related action menu of a recurring journal template..

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/fincore/8180886.html

Financial Accounting - Intercompany Transaction Performance

A

What's Changing

With the 2024R2 release, Workday delivers a performance enhancement to the processing that updates intercompany transactions upon a manual journal reversal. This enables to potentially experience faster run times and more efficient resource usage for intercompany transaction updates.

Additional Considerations

Workday improves the performance of the processing that updates intercompany transactions upon a manual journal reversal.

Workday recommends that you test reversals of manual intercompany journals to ensure there's no impact on your workflow.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/fincore/8095478.html

Financial Accounting - Operational Journal Entry Validations

A

What's Changing

With the 2024R2 release, Workday now displays validations for currency amounts and conversion rates on operational journals to indicate an error.

Additional Considerations

On the View Journal report of an operational journal, Workday displays: a new validation when:

- A warning validation when a journal line has a currency rate that doesn't match the transaction and ledger currency amounts.
- An error validation when a journal line has both a debit and credit amount in either the transaction or ledger currency amount.
- An error validation when a multicurrency journal line has a debit amount in transaction currency and a credit amount in a ledger currency, or a debit amount in a ledger currency and a credit amount in a transaction currency.

Workday now also displays the error validations on the Fix Operational Journals With Errors task.

What Do I Need To Do?

N/A.

What Happens If I Do Nothing?

N/A.

Community Link https://doc.workday.com/release-notes/en-us/fincore/8154367.html

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Financial Aid

Financial Aid - Aging Receivable Reports with Custom Aging Groups

A

What's Changing

Workday delivers two reports for tracking aging student receivables.

Additional Considerations

With this release, Workday delivers these new composite reports (secured to the Report Execution domain):

- Student Receivables Aging Summary
- Student Receivables Aging Detail

These reports enable student account specialists to view student charges, payment plans, and due and overdue total amounts. You can drill down to view additional details. Use these reports for reconciliation with the accounts receivable general ledger.

What Do I Need To Do?

N/A.

What Happens If I Do Nothing?

N/A.

Community Link

https://doc.workday.com/release-notes/en-us/stufin/6324236.html

Financial Aid - Cost Item Column on Student Self-Service Tasks

A

What's Changing

With this release, Workday enables institutions to label cost of attendance components to reflect the changes in the FAFSA Simplification Act guidelines.

Additional Considerations

Workday removes the Cost Type column on these student self-service tasks and replace it with the Cost Item column for consistency with the guidelines described in the FAFSA Simplification Act:

- Estimated Costs for Award Year (for mobile devices)
- View Estimated Costs (for mobile devices)
- View Financial Aid as Third Party
- View Financial Aid Estimated Cost

The new Cost Item column displays the names of cost items.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stufad/7609108.html

Financial Aid - Financial Aid Reaction Flags

A

What's Changing

With this release, Workday increases visibility on the Financial Aid Period Record related actions menu by enabling you to gain additional insight into reaction flags.

Additional Considerations

Workday delivers these new fields on the Financial Aid Period Record related actions preview window: Federal School Code; Institution; Program of Study; Reaction Flags.

You can use the Reaction Flags field to drill down into a grid providing details of jobs, tasks, or Workday internal processes associated with the student's reaction flags for the financial aid period record. The grid displays these columns: Job or Task; Reaction Flag; Reaction Flag Type.

For clarity, Workday adds hover text to the Reaction Flags field and the Job or Task items, providing you with information about the associated values.

For additional details, see the 2024R1 Financial Aid Reaction Flags feature in the What's New in Workday report.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stufad/7179581.html

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Financial Aid - Mass Cancel Student Awards

A

What's Changing

With this release, Workday enables you to cancel student awards in bulk using Workday's Mass Operation Management task.

Additional Considerations

On the Mass Operation Management task, Workday delivers a new Cancel Student Awards mass operation type. This enables you to cancel multiple student awards at once based on a custom report you select.

Workday delivers a new Mass Cancel Student Awards segment-based security group. Members of this group can select the new mass operation type on the Mass Operation Management task.

Workday also delivers a new Already Canceled column on the Data Not Processed report which you can access on the Results section after you run your mass operation.

What Do I Need To Do?

Create a custom report with a data source of Student Awards to use as the input report for the mass operation. Workday can process up to 50,000 awards for mass cancel operations.

Note: Mass cancel operations don't apply to student applicant awards.

What Happens If I Do Nothing?

No impact.

Community Link https://doc.workday.com/release-notes/en-us/stufad/7726543.html

Financial Aid - Midyear ISIR Progression with Undergraduate and Graduate Levels

A

What's Changing

Workday improves the awarding and packaging processes for students transitioning from undergraduate to graduate programs in the same financial aid award year. Starting with the 2024-2025 award year, these midyear progression students can now have 2 active ISIRs (1 undergraduate and 1 graduate) instead of 1 active ISIR on their financial aid period record.

This change makes it easier to assign different financial aid packages for undergraduate and graduate levels based on corresponding ISIRs.

Additional Considerations

ISIR Progression and Activation

Workday now categorizes imported ISIRs using a new classification, Grade Level Group, which is based on the value of an ISIR's Grade Level in College field.

For ISIR progression in the 2024-2025 award year and later, Grade Level Group can have these possible values:

• Undergraduate: For all first-year, second-year, other junior and senior undergraduate grade levels, and unspecified grade levels.

• Graduate: For students pursuing graduate degrees, professional or beyond.

What Do I Need To Do?

Correct Mismatched ISIRs

Review student ISIRs and correct any active 2024-2025 ISIRs with a mismatch of FAPR class standing grade level and the ISIR's Grade Level Group. This mismatch is limited to 2024-2025 ISIRs before this feature goes into your Production tenant. If you find mismatches when reviewing the financial aid awards and packages on those FAPRs, repackage the student by correcting their Grade Level in College field, import the corrected ISIR into Workday as the new active ISIR, then repackage the student with this new active ISIR.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stufad/7949785.html

Financial Aid - Packaging for Undergraduate and Graduate Programs in the Same Award Year

A

What's Changing

With this release, Workday enables you to package financial aid for students who progress from undergraduate to graduate programs during a financial aid award year.

Additional Considerations

Workday now packages financial aid for an academic period according to the grade level group of the ISIR for that period. When a student is at an undergraduate academic level, Workday uses their undergraduate ISIR SAI amount to calculate financial aid need for the academic period. When the student progresses to a graduate level, Workday uses the SAI amount from their graduate ISIR to calculate need for subsequent academic periods.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

Workday packages financial aid according to these new processing methods for award years 2024-2025 and later.

Community Link https://doc.workday.com/release-notes/en-us/stufad/7767235.html

Financial Aid - Parent PLUS Student Awards

A

What's Changing

With this release, Workday enhances functionality for Master Promissory Note (MPN) action items associated with Parent PLUS student awards by enabling administrators and students to know if a unique borrower associated with a Parent PLUS loan needs to complete an MPN.

Additional Considerations

Workday now enables you to assign an MPN action item for each unique borrower associated with a Parent PLUS student award. Previously, you could assign only 1 MPN action item to the student award.

Now, when you import an MPN, Workday automatically completes the MPN action item for the linked borrower if the MPN status is Pending or Accepted. We release disbursements to students for borrowers whose MPN status is Accepted.

Additionally, Workday now automatically reassigns MPN action items to students during financial aid packaging if a borrower's existing MPN is due to expire on or before the time of award disbursement.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stufad/7471623.html

Financial Aid - PLUS Loan Matching Enhancements

A

What's Changing

Workday improves your PLUS loan experience by minimizing last-name mismatches between PLUS loan applications and student Workday profiles.

Additional Considerations

For better matching, Workday now compares a student's date of birth and Social Security Number (SSN) from the PLUS Loan Application after not finding a match with the student's SSN, last name, and first 2 letters of their first name.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stufad/7774312.html

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Financial Aid - Refresh ISIR and NSLDS Transactions

A

What's Changing

Workday enhances functionality for financial aid based configuration changes by enabling you to run a task to refresh access for ISIR and NSLDS transactions, action items, and holds after you add a new academic unit to your academic structure.

Additional Considerations

Workday delivers a new Refresh ISIR & NSLDS Transactions task (secured to the Manage: ISIR Action Item Evaluation and Set Up: Financial Aid domains) that you can access on the Refresh Financial Aid Based on Configuration Changes task. You use this task after you add a new academic unit to your academic structure.

What Do I Need To Do?

Run this task after you add a new academic unit to your academic structure.

What Happens If I Do Nothing?

If you don't run this task after you add a new academic unit, ISIR and NSLDS transactions, action items, and holds will be out of sync.

Community Link https://doc.workday.com/release-notes/en-us/stufad/6964789.html

Financial Aid - Return of Title IV Reporting

A

What's Changing

With this release, Workday delivers a number of report fields related to Return of Title IV worksheets.

Additional Considerations

Workday delivers these new report fields on the Return of Title IV Worksheet business object (secured to the Manage: Return of Title IV Processing - USA domain):

- Institutional Returns - Direct Subsidized Loan
- Institutional Returns - Direct Unsubsidized Loan
- Institutional Returns - Direct PLUS Loan
- Institutional Returns - Grad PLUS Loan
- Institutional Returns - Pell Grant
- Institutional Returns - Supplemental Education Opportunity Grant
- Institutional Returns - TEACH Grant
- Institutional Returns - Iraq and Afghanistan Service Grant
- Student Returns - Pell Grant
- Student Returns - Supplemental Education Opportunity Grant
- Student Returns - TEACH Grant
- Student Returns - Iraq and Afghanistan Service Grant
- Total Loan Amount for Institutional Return
- Total Grant Amount for Institutional Return
- Total Loan Amount for Student Return

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stufad/7772154.html

Financial Aid - Satisfactory Academic Progress (SAP) Data on Student Profiles

A

What's Changing

Workday adds SAP data to student profiles.

Additional Considerations

Workday adds a new Satisfactory Academic Progress report to the Financial Aid profile group on student profiles. This report displays SAP data by financial aid period record for the student, including:

- Statuses
- Overrides
- Appeals

What Do I Need To Do?

You don't need to do anything, this feature is automatically available.

What Happens If I Do Nothing?

The new Satisfactory Academic Progress report displays on student profiles when they have SAP data.

Community Link https://doc.workday.com/release-notes/en-us/stufad/7768938.html

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Financial Aid - Send Back Return of Title IV Worksheets

A

What's Changing

With this release, Workday enables you to send back Return of Title IV worksheets when you require the submitter to make changes.

Additional Considerations

Workday adds a Send Back button that displays on My Tasks items related to Return of Title IV worksheets. When you select the new button, Workday:

- Prompts you to add a comment explaining why you are sending back the worksheet.
- Assigns a My Tasks item to the worker who submitted the worksheet, enabling them to make revisions and resubmit.

Workday also delivers a new Financial Aid Period Record for Return of Title IV Worksheet report field. This field returns the financial aid period record associated with an approved Return of Title IV Worksheet.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stufad/7740535.html

Financial Aid - Visibility of SAP Appeal Questionnaire Responses

A

What's Changing

Workday makes the responses to Satisfactory Academic Progress (SAP) appeal questionnaires visible even after the appeal is approved.

Additional Considerations

With this release, you can view questionnaire responses for submitted SAP appeals:

On the View Satisfactory Academic Progress report and the Edit Satisfactory Academic Progress task, which you can access from the related actions menu of the financial aid period record. When the student completes the questionnaire, a new SAP Appeal Questionnaire tab displays with the responses.

When you view the Satisfactory Academic Progress Appeal Event. When the student completes the questionnaire, a new SAP Questionnaire section on the Details tab displays with the responses.

What Do I Need To Do?

You don't need to do anything, this feature is automatically available.

What Happens If I Do Nothing?

After a student fills out an SAP appeal questionnaire, you can view the questionnaire responses on the View Satisfactory Academic Progress report, Edit Satisfactory Academic Progress task, and Satisfactory Academic Progress Appeal Event.

Community Link https://doc.workday.com/release-notes/en-us/stufad/8076827.html

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Financial Aid - Financial Aid Action Items

A

What's Changing

Workday adds new filters so that you can more easily find relevant financial aid action items on these reports:

- Evaluate Financial Aid Action Items
- Review Financial Aid Action Items

Additional Considerations

Additional Filters

You can now filter financial aid action items by:

- Selecting the Include Only Applicants or Students Processed by Me checkbox on the prompt for the Evaluate Financial Aid Action Items report.
- Selecting the Last Name Range checkbox and specifying a custom range of student and/or applicant last names when running the Evaluate Financial Aid Action Items or Review Financial Aid Action Items reports. Example: students with last names A through M.

Action Item Categories

When running the Review Financial Aid Action Items report, you must now specify the institution after selecting Non-ISIR or Student Award from the Action Item Categories field.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stufad/7493621.html

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Grants

Grants - Eligible Investigator Usability

A

What's Changing

Workday continues to enhance the eligible investigator feature by now including reference IDs on eligible investigator reports, enabling you to more easily assign roles on awards and grants to eligible investigators using web service integrations. Workday also now enables you to search for grants by the names of eligible investigators assigned to roles on the grants.

Additional Considerations

Workday adds a new Reference ID field on the Find Eligible Investigators report, enabling you to view the reference IDs of the returned eligible investigators. You can use these reference IDs on the Assign Roles web service to assign eligible investigators to roles on awards, grants and grants hierarchies.

Workday also now enables you to search for grants by the names of the persons whose eligible investigators are assigned to roles on the grants.

Workday disables the ability to create new persons on the Person prompt of the Create Eligible Investigator task, preventing you from unintentionally creating a new person for the eligible investigator, as the task requires you to select an existing person with a valid role.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/fingrt/8026545.html

Grants - Layouts for Grants Tasks and Reports

A

What's Changing

Workday redesigns Grants Management tasks and reports.

Additional Considerations

Workday redesigns the layout for these task and report:

- Create Invoices for Cost Reimbursable Award Transactions
- Maintain Billing Status for Cost Reimbursable Award Transactions

What Do I Need To Do?

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

What Happens If I Do Nothing?

Your users will see the new layouts. The task and report will continue to work as before.

Community Link https://doc.workday.com/release-notes/en-us/fingrt/7064525.html

Grants - Letter of Credit Drawdown Performance and Usability

A

What's Changing

Workday improves the performance and usability of letter of credit drawdowns.

Workday now displays rows faster and reduce the time to enter drawdown amounts on these tasks:

- Change Letter of Credit Draw Down
- Edit Letter of Credit Draw Down
- Record Letter of Credit Draw Down
- Review Letter of Credit Draw Down
- Revise Letter of Credit Draw Down

On these tasks, Workday no longer recalculates award and company totals on the fly when you enter amounts to draw. Workday adds an Update Award and Company Totals button, which you can click for Workday to recalculate these amounts.

Additional Considerations

Workday also adds the total amount to the title of letter of credit drawdown items that display in My Tasks and on Details and Process pages, helping you identify letter of credit drawdown events.

What Do I Need To Do?

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

What Happens If I Do Nothing?

When users change amounts to draw, Workday now requires them to update award and company totals before submitting letter of credit drawdowns.

Your users will also notice performance improvements for letters of credit with large numbers of awards.

Community Link

https://doc.workday.com/release-notes/en-us/fingrt/7659115.html

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Inventory

Inventory - Chain of Custody - Additional Tracking Number Improvements

A

What's Changing

With the 2024R1 release, Workday delivers further enhancements to Workday's chain of custody functionality, enabling greater visibility into package movements based on carrier tracking numbers.

With these improvements, you can more easily access tracking number details reducing time for supply chain workers to respond to inquiries about the location of their orders.

Additional Considerations

Workday updates the View Tracking Number page enabling you to view the:

- Last worker who triggered a status update.
- Last location for the tracking number, if available.
- Time stamps for the creation of documents such as receipts, dock manifests, or goods deliveries and their corresponding tracking numbers.

What Do I Need To Do?

This feature is automatically available. Workday recommends updating your training materials to address the updates to chain of custody and tracking numbers.

What Happens If I Do Nothing?

Your users will see the Tracking Number searches results in the Procurement and Inventory tab when they enter a tracking number that's been recorded throughout the chain of custody process. Additionally, users who currently use the View Tracking Number task will see additional fields added to the task.

Community Link https://doc.workday.com/release-notes/en-us/sminv/8040204.html

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Procurement

Procurement - Checkout Requisition Performance Improvements

A

What's Changing

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

Additional Considerations

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

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/smreq/7647481.html

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Procurement - Company Currency Fields For Editing and Reviewing Procurement Documents

A

What's Changing

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

Additional Considerations

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

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

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

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

What Do I Need To Do?

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

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

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

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

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Procurement - Company Currency Fields For Editing and Reviewing Procurement Documents (cont.)

A

Additional Considerations (cont.)

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

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

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

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

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

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

What Happens If I Do Nothing?

You won’t notice any changes if you do nothing and your requisitions, purchase orders, or change orders are in the same currency as the company’s base currency.

If you do nothing and create requisitions, purchase orders, or change orders in a currency other than the company’s base currency, the new base currency field will appear. If a customer doesn’t want to see the field displaying the total amount in the company’s base currency, you can hide the field. Access the Configure Optional Fields task to hide the:

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

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

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Procurement - Mass Change Buyer on Purchase Order

A

What's Changing

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

Additional Considerations

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

The Procurement Document Type field enables you to select:

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

As you complete new Mass Change Buyer on Purchase Order task, consider:

- When you update the buyer on a purchase order, Workday also updates the buyer for associated change orders that are In Progress and in Draft status.

What Do I Need To Do?

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

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

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Procurement - Mass Change Buyer on Purchase Order (cont.)

A

Additional Considerations (Cont.)

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

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

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

- Business Document Type
- From Buyer

What Do I Need To Do?(Cont.)

- Review the Mass Change Requisition Requestor business process, now renamed the Mass Change Worker on Procurement Document business process, to ensure that it is set up with new condition rules in order to route the approvals to the correct user. You will need to do this even if you don't use the purchase order functionality in the new Mass Change Worker on Procurement Document task.

What Happens If I Do Nothing?

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

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

Procurement - Mass Change Buyer on Purchase Order (cont.)

A

Additional Considerations

- Number of Purchase Orders Changed
- Purchase Orders Changed
- To Buyer
- Use New Buyer As

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

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

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

Procurement - Procurement Tasks Performance Improvements

A

What's Changing

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

Additional Considerations

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

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

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

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

Procurement - Setup: Item Substitutes with Different Base Unit of Measure

A

What's Changing

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

Additional Considerations

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

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

Workday updates these web services to enable item substitutes with different base UOMs:

- Get Purchase Items
- Put Purchase Item

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

What Do I Need To Do?

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

What Happens If I Do Nothing?

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

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

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Procurement - Spend Management Tasks Performance Improvements

A

What's Changing

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

Additional Considerations

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

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

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

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

Projects

Projects - Custom Validations and Business Processes for Ad Hoc Project Transaction Web Services

A

What's Changing

With the 2024R2 release, Workday now provide a new Ad Hoc Project Transaction by Header web service that enables you to create ad hoc project transactions and uses the custom validations and business processes you configure within Workday. This new web service includes get, submit, and bulk import operations.

Additional Considerations

The web service only permits you to create transactions, you can't edit transactions with the web service. The web service supports these ad hoc project transaction types:

- Expense
- Miscellaneous Expense
- Supplier Invoice
- Time

For larger volumes of transactions i.e., when you want to create 1000 transactions or more, you can include a bulk import operation. However, for best performance, limit each header to 1000 transactions or less.

What Do I Need To Do?

Configure custom validations for ad hoc project transactions and business processes within Workday. No additional steps are needed to use this feature. Transactions you create with the web service will be subject to the same validations and business processes as within Workday.

What Happens If I Do Nothing?

If you choose not to use the web service, you'll see no changes

Community Link https://doc.workday.com/release-notes/en-us/finprj/8026830.html

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Projects - Worker Absence and Other Project Allocation in Resource Forecaster

A

What's Changing

With the 2024R2 release, Workday updates the Project Resource Forecaster to include an overlay of visual indicators of project resource allocation, along with an additional window that displays when you hover, showing the workers scheduled project hours, scheduled absences, and hours allocated to other projects.

Workday has also included the ability to drill down for additional details.

Additional Considerations

- When you view the Project Resource Forecaster, Workday displays an overlay of arrows indicating whether project resources are over or under allocated with regard to the worker's scheduled hours. When you hover over the hours for a given period, Workday displays a window which displays the worker's scheduled hours for the project, scheduled absences, and hours allocated to other projects and project roles. The total is displayed along with an indication of whether the resource is over or under allocated regarding their scheduled hours. You can also further drill down to see a detailed view of the calculation.
- Workday also add the ability to sort and filter the grid, as well as delete up to 5 rows.
- You can turn the overlay off using the button on the top-right of the Resource Forecaster grid.

What Do I Need To Do?

Access the Resource Forecaster and select the workers you want to drill down on. Ensure you have security access to the projects for which you want to view worker roles.

What Happens If I Do Nothing?

If you don't use the Project Resource Forecaster, you'll notice no changes.

Community Link https://doc.workday.com/release-notes/en-us/finprj/8118890.html

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Supplier Accounts

Supplier Accounts - Commodity Codes on Non-PO Supplier Invoices

A

What's Changing

With the 2024R2 release, Workday enables you to add commodity codes and associate these codes with your non-PO supplier invoices, supplier invoice adjustments, and recurring supplier invoices. This provides you with the ability to set up and track spend information based on the commodity code structure for products and services.

Additional Considerations

Workday updates these web services to include commodity code fields so you can add commodity codes using web services:

- Bulk Import Supplier Invoice Web Service
- Get Supplier invoice
- Import Supplier Invoice Web Service
- Put Supplier Invoice Text Only Web Service
- Recurring Supplier Invoices Web Service
- Submit Supplier Invoice Adjustment Web Service
- Submit Supplier Invoice Web Service

Workday also enable you to carry over commodity codes from a customer invoice to a supplier invoice when you're working with direct inter-company invoices.

What Do I Need To Do?

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

What Happens If I Do Nothing?

Users see the commodity code field on supplier invoices, supplier invoice adjustments, recurring supplier invoices, and in the Supplier Invoice Workbench.

Community Link https://doc.workday.com/release-notes/en-us/finsa/8110925.html

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Supplier Contracts

Supplier Contracts - Unsupported Security Group Access to Supplier Contract Reporting Data Sources

A

What's Changing

With the 2024R2 release, Workday enables greater access to the Supplier Contract Lines report data source for security groups.

Additional Considerations

Workday updates the Supplier Contract Lines data source filter to evaluate security for these security groups:

- Intersection
- Supplier Contract Specialist for Supplier Contract
- Unconstrained

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.

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

Workday delivers 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?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/smcoco/8049584.html

Integration

Integration 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.

Integration

- Bank Account Transfer for Settlement Functionality
- Business Objects on the Data Sources REST API
- Ceridian Check Print Service Integration
- Core Connector: Payroll Check Printing Integration
- EIB Spreadsheet Layout for Import External Student Information Web Service
- Get Taxable Document for Tax Calculation Web Service
- Handle Import Processing Errors Check Box for EIBs
- Handle Import Processing Errors Header for Web Services
- HMRC RTI Special Characters
- Improved Performance for Import Web Services
- My Tasks Notifications for Event-Driven Integration for Third-Party Payroll Integration Service
- Purge Pre-Hire Data
- Submit Supplier Web Services Updates
- Workday Query Language Support for Do Not Use Report Fields

Integration - Bank Account Transfer for Settlement Functionality

A

What's Changing

With the 2024R2 release, Workday enhances bank account transfer for settlement functionality to now accurately provide beneficiary company bank address and tax id in payment files.

Additional Considerations

Workday now includes the beneficiary company bank address and tax id in payment files generated through these Workday-delivered integration templates and web services:

- Core Connector: Payments V2 Outbound template
- WPN - ISO 20022 V3 (Enhanced Performance) template
- Get Payments web service
- Get Payment Messages web service

Workday also now includes only the tax ID in payments generated from the WPN - ISO 20022 V2 Direct Debit (Enhanced Performance) integration template.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/finset/7697455.html

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Integration - Business Objects on the Data Sources REST API

A

What's Changing

Workday updates the Data Sources API in the Workday Query Language v1 REST web service to now return primary and related business objects associated with the data sources and fields, respectively.

Additional Considerations

The responses from these endpoints now return the primary business object for each data source:

- GET /dataSources
- GET /dataSources/{ID}

The responses from these endpoints now return the related business object for each field:

- GET /dataSources/{ID}/fields
- GET /dataSources/{ID}/dataSourceFilters/{subresourceID}

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/anabidata/7972388.html

cognizant

Integration - Ceridian Check Print Service Integration

A

What's Changing

Workday continues to enhance the Ceridian Check Print Service integration.

Additional Considerations

To help ensure authorized access for documents, Workday now secures the WPN - Ceridian Check Printing integration template to the Domain Process: Payroll Settlement domain in addition to its existing domains.

What Do I Need To Do?

This feature is automatically available.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/paywdi/7810130.html

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Integration - Core Connector: Payroll Check Printing Integration

A

What's Changing

Workday continues to enhance the Core Connector: Payroll Check Printing integration.

Additional Considerations

To help ensure authorized access for documents, Workday now secures the Core Connector: Payroll Check Printing (Enhanced Performance) integration template to the Domain Process: Payroll Settlement domain in addition to its existing domains.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/paywdi/7439821.html

Integration - EIB Spreadsheet Layout for Import External Student Information Web Service

A

What's Changing

With this update, Workday streamlines the EIB template for v43.0 of the Import External Student Information web service.

Additional Considerations

With this update, Workday streamlines the EIB template for v43.0 of the Import External Student Information web service. Workday consolidates the External Student Data sheet into the Import External Student sheet.

This makes it easier for you to avoid using a different header key for each row, causing the rows to run as separate jobs and leading to performance issues.

Workday also replaces the Header Key and Line Key columns with a new Spreadsheet Key column. You can add unique sequential numbers to the new column.

What Do I Need To Do?

There's no action required. This update is automatically available.

What Happens If I Do Nothing?

If you use versions prior to v43.0 of the Import External Student Information web service, you won't see these changes.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/8171178.html

Integration - Get Taxable Document for Tax Calculation Web Service

A

What's Changing

Workday updates the Get Taxable Document for Tax Calculation web service with new fields to support third party tax calculation enhancements.

These new fields include help you to perform tax calculations and comply with regulations.

Additional Considerations

-N/A

What Do I Need To Do?

No steps need to be taken. This feature is automatically available.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/fintax/8054100.html

Integration - Handle Import Processing Errors Check Box for EIBs

A

What's Changing

With this update, Workday enables you to run Enterprise Interface Builder integrations (EIBs) to handle import processing errors gracefully. Workday also updates the Launch EIB v43.0 web service to support this functionality.

Note: This update applies only to EIBs created for Import v43.0 or greater web services. You can view the name and version of the web service that your EIB uses in the View Integration System Page.

Additional Considerations

Workday adds a new Handle Import Processing Errors check box on the Integration Criteria table on the Launch/Schedule Integration task. When selected, it enables the EIBs to run without failing when there are import processing errors. The check box is selected by default.

Workday also adds a Handle Import Processing Errors field to the View Background Process page.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/eib/8008007.html

Integration - Handle Import Processing Errors Header for Web Services

A

What's Changing

Workday delivers a new x-handle-import-process-errors HTTP header for Import web services in Workday.

This header enables Import web services to handle processing exceptions – including exceptions related to custom validations.

Additional Considerations

Now, if you:

- set the header as x-handle-import-process-errors=1 (true), your Import web service will use the new processing to handle exceptions. For v43.0 and higher, the header defaults to true.
- set the header as x-handle-import-process-errors=0 (false), your Import web service won't use the new processing to handle exceptions. For web service versions lower than v43.0, the header defaults to false.
- use this header to handle processing exceptions, your web service might run slower.

This update only applies to Import web services. Bulk Import web services already automatically use the processing provided by this new header.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/wsf/7838858.html

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Integration - HMRC RTI Special Characters

A

What's Changing

Workday now enables you to submit accented or special characters, in a worker's address, in a Full Payment Submission (FPS) file to HMRC.

If you enter an accented or special character in these fields, on the Worker and Partner objects, Workday converts it to a character that HMRC accepts:

- Home Address Line 1
- Home Address Line 2
- Home Address Line 3
- Home Address Line 4

Additional Considerations

This saves you time instead of having to manually amend any special characters and reduces the chance of HMRC rejecting your submission.

What Do I Need To Do?

To convert special characters in the address fields to an HMRC accepted character when you submit the RTI FPS integration, select the Enable FPS Special Characters check box in the Edit UK Employer Reference task.

What Happens If I Do Nothing?

If you submit an integration file containing special or accented characters HMRC will reject the file.

Community Link https://doc.workday.com/release-notes/en-us/paywdgbr/7567407.html

Integrations - Improved Performance for Import Web Services

A

What's Changing

With this release, Workday updates the layout of Enterprise Interface Builder (EIB) spreadsheets for mass loading data for several Import web services related to Contact Information and Personal Information.

Replacing the Header and Line Key columns with the single Spreadsheet Key column avoids confusion and improves performance for EIB integrations

Additional Considerations

Workday replaces the Header and Line Key columns with the Spreadsheet Key on these web services for v43.0:

- Import Change Home Contact Information
- Import Change Work Contact Information
- Import Person Photos
- Import Universal Identifiers

What Do I Need To Do?

There's no action required. This update is automatically available.

What Happens If I Do Nothing?

If you use versions prior to v43.0 of the webservices mentioned here, you won't see these changes.

- Import Change Home Contact Information
- Import Change Work Contact Information
- Import Person Photos
- Import Universal Identifiers

Community Link https://doc.workday.com/release-notes/en-us/hrpersoninf/7521872.html

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Integrations - My Tasks Notifications for Event-Driven Integration for Third-Party Payroll Integration Service

A

What's Changing

With this release, Workday improves layout of My Task notifications for the Event-Driven Integration for Third-Party Payroll Integration Service.

Additional Considerations

You may see slight changes in the notifications user interface.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/payexternal/7762377.html

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Integrations - Purge Pre-Hire Data

A

What's Changing

With 2024R2, Workday enables you to purge data for Pre-Hires who don't have a candidate, student, or worker record in Workday.

Additional Considerations

Existing Purgeable Data Types

Workday enables these existing purgeable data types (PDTs) so that you can use them to purge data for Pre-Hires who don't have a candidate, student, or worker record in Workday:

- Names
- Contact Information
- Personal Information
- Person's IDs
- Person's Payment Elections
- Pre-Hire Resume
- Event Data
- Questionnaire Results
- System
- Universal ID

What Do I Need To Do?

You must access the Purge Person Data task if you want to purge data for Pre-Hires who don't have a candidate, student, or worker record in Workday. To remove payment election data for Pre-Hires, Payroll administrators must create a custom report, then access the Purge Person Data task.

What Happens If I Do Nothing?

All Pre-Hire data remains in Workday.

Community Link https://doc.workday.com/release-notes/en-us/hrinfra/8083398.html

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Integrations - Purge Pre-Hire Data (cont.)

A

Additional Considerations

New Purgeable Data Types

Workday also delivers these new purgeable data types (PDTs) so that you can use them to purge data for Pre-Hires who don't have a candidate, student, or worker record in Workday:

- Pre-Hire ID
- Pre-Hire Data

Note:

You can only purge data for a Pre-Hire when:

- *The Pre-Hire is created as a standalone Pre-Hire.*
- *There's no active, terminated or former worker, student, or candidate record linked to the Pre-Hire.*
- *The Pre-Hire doesn't have complete or in-progress Hire events.*
- *The Pre-Hire doesn't have incomplete events.*

Payment Election Data

Payroll administrators can now remove payment election data for Pre-Hires.

Community Link

https://doc.workday.com/release-notes/en-us/hrinfra/8083398.html

Integration – Submit Supplier Web Services Updates

A

What's Changing

Workday delivers a new validation on some supplier web services.

Additional Considerations

Workday delivers a new Business Entity Contact: Supplier Contact valid for Supplier validation on all versions of these web services:

- Submit Supplier
- Submit Remit To Supplier Connection

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/smsupp/8169497.html

Integration – Workday Query Language Support for Do Not Use Report Fields

A

What's Changing

Workday continues to enhance Workday Query Language (WQL), providing more flexibility over how you programmatically export Workday data, explore available data sources and data source filters and fields, and query Workday for data.

Additional Considerations

WQL now supports queries that already use report fields that Workday has updated to Do Not Use status after you created the query.

Note: Workday recommends that you don't add report fields that Workday has already marked as Do Not Use to new or existing queries.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/anabidata/8156950.html

Learning

Learning 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.

Learning

- Enforce Lesson Sequence in a Course
- Learning Assignments Reporting
- Learning Assignments Security Update
- Learning Assignments Visible on Learning Content
- Multiple Assessors for Enrollments
- Program Completion Logic

Learning – Enforce Lesson Sequence in a Course

A

What's Changing

With the 2024R2 release, Workday allows you to enforce a lesson order within a course, ensuring that learners complete the required lessons in the designated sequence. By enforcing a lesson sequence, learners build a stronger foundation of knowledge and deeper understanding before they can complete an assessment or evaluate the content.

Additional Considerations

Workday adds a new Enforce Lesson Order check box on all the Create, View, and Edit Courses and Course Offering tasks.

When you select the check box, learners can't access self-directed mandatory lessons (including media, surveys, and external link lessons) until they complete the previous content.

- If the course contains any virtual or in-person instructor-led training lessons, subsequent lessons are available after the end date of the instructor-led lesson.
- If the course contains any training activity lessons, subsequent lessons are available after grading and attendance is completed.

Workday delivers these report fields (secured to the Public Reporting Items domain) which you can use in condition rules for business processes:

- Enforce Lesson Order - Proposed on the Learning Course Management Event and Learning Course Offering Event business objects.
- Enforce Lesson Order - Current on the Learning Course Management Event and Learning Course Offering business objects.

What Do I Need To Do?

This feature is automatically available. You can edit existing courses to enforce lesson order.

Note: you need to have, at least, 2 self-directed mandatory lessons to enforce lesson order in courses and course offerings.

What Happens If I Do Nothing?

Learners can take course content in any order, including surveys and assessments.

Community Link https://doc.workday.com/release-notes/en-us/lrn/7379632.html

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Learning – Enforce Lesson Sequence in a Course (cont.)

A

Additional Considerations

Workday also delivers the Enforce Lesson Order report field (secured to the Learning Access, Manage: Learning Content, Manage: Learning Course Enrollments, and Set Up: Learning Catalog domains) on the Learning Content business object.

If you enforce lesson order in a course or course offering, Workday adds these to inform learners about completing lesson in order:

- A new banner.
- A lock icon with the associated help text to lesson titles.

Finally, Workday updates these web services to enable you to enforce lesson order:

- Get Blended Course
- Get Digital Course
- Get Learning Course Offering
- Get Learning Courses
- Manage Learning Course
- Manage Learning Course Offering
- Put Blended Course
- Put Course Offering
- Put Digital Course

Community Link https://doc.workday.com/release-notes/en-us/lrn/7379632.html

Learning – Learning Assignments Reporting

A

What's Changing

With the 2024R2 release, Workday delivers a new My Team's Learning Assignments standard report to help managers track the learning content assigned to their teams. This change enables managers to proactively monitor their team's learning assignments and progress to ensure timely completion.

What Do I Need To Do?

Nothing, this feature is automatically available. Managers can access the new report from the global search.

Additional Considerations

The new My Team's Learning Assignments advanced report is secured to the Person Data: Learning domain.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/lrn/7819018.html

Learning – Learning Assignments Security Update

A

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.

Security:

Workday secures 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 don't change your security setup, you will see no changes.

Community Link https://doc.workday.com/release-notes/en-us/lrn/7960813.html

Learning – Learning Assignments Security Update (cont.)

A

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.

Workday delivers 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:

Name	Description	Security
Learner's Location (Current)	The current location for the learner.	*Self Service: Learning* *Reports: Learning Record* *Person Data: Learning*
Learner's Extended Enterprise Affiliation (Current)	The current extended enterprise affiliation for the learner.	*Self Service: Learning* *Reports: Learning Record* *Person Data: Learning*
Learner's Supervisory Organization (Current)	The current supervisory organization for the learner.	*Self Service: Learning* *Reports: Learning Record* *Person Data: Learning*

Community Link https://doc.workday.com/release-notes/en-us/lrn/7960813.html

Learning - Learning Assignments Visible on Learning Content

A

What's Changing

With this release, Workday enhances visibility of Learning Assignments by adding a new Assignments tab on the Administrator view of Learning Content. Similar to how the Enrollments tab works today, you can now see all assignments that relate to the learning content.

Workday also delivers a new Find Learning Assignments report, accessible from the Assignments tab, which allows you to search for assignments using additional criteria.

Additional Considerations

Business Benefits

This update increases efficiency and provides the ability to view, filter and manage assignments directly from the learning content.

Changes

Workday adds a new Assignments tab on the administrator view of Learning Content. The Assignments tab is secured to these domains:

- Manage: Learning Course Enrollments
- Self-Service: Learning Instructor
- Setup: Learning Catalog

What Do I Need To Do?

You need to configure security access to allow access to view the Assignments tab, and the assignments data within it.

What Happens If I Do Nothing?

The Assignments tab is available to those who have administrator access on learning content, and to learning assignments.

Community Link

https://doc.workday.com/release-notes/en-us/lrn/7960810.html

Learning - Learning Assignments Visible on Learning Content (cont.)

A

Additional Considerations

Within the Assignments tab, Workday sorts the data by Assigned Date, showing Open Assignments first. The assignment data within the Assignments tab is secured to these domains:

- Manage: Learning Assignments
- Person Data: Learning
- Reports: Learning Record

Workday delivers a new Find Learning Assignments report, accessible from the Assignments tab via the View Learning Assignments Report button. This report is secured to these domains:

- Person Data: Learning
- Reports: Learning Record

Workday also delivers 2 new report fields on the Learning Assignment business object:

- Required as Text (secured to the Manage: Learning Assignments domain): you can use this field to identify if the assignment is required or not required.
- Learner for Assignment (secured to the Public Reporting Items domain): to see who is the learner for the assignment record.

Finally, Workday introduces a new report data source filter on the Learning Assignment Records data source, which prompts you to select at least one piece of content before running the report:

- All Assignments for Learning Content

Community Link https://doc.workday.com/release-notes/en-us/lrn/7960810.html

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Learning – Multiple Assessors for Enrollments

A

What's Changing

With the 2024R2 release, Workday allows you to assign multiple assessors to a single learning enrolment or enable assessors to assign themselves to a learner.

Additional Considerations

Assigning multiple assessors for enrollments provides a better experience for organizations that conduct observations over longer periods.

Multiple Assessors

- When there are multiple assessors for a course, you can now select multiple assessors from the Mark all as Assessed by prompt in the Manage Grading and Attendance task.
- Workday also allows you to assign multiple assessors to your previously created enrollments.
- Your learners can now see the list of all assessors for a course in the CONTACTS section of the View Course report.

What Do I Need To Do?

This feature is automatically available. Workday recommends us to update our training materials so that users are aware of the changes

What Happens If I Do Nothing?

You can still assign multiple assessors to enrollments and assessor can still assign themselves to a learner using the new 'Assessor Self-Assign' task.

Community Link https://doc.workday.com/release-notes/en-us/lrn/7856760.html

Learning – Multiple Assessors for Enrollments (cont.)

A

Additional Considerations

Remove Assessors from Multiple Training Activities

Workday adds a new Assessors prompt to the_Remove Assessor from Training Activities task to enable you to remove more than one assessor from multiple training activities.

Assessor Self-Assign Task

Assessors in your organization can now assign a learner to themselves on the mobile application interfaces using the new Assessor Self-Assign task

Note: Using the Assessor Self-Assign task, your assessors:

- *Can access only the enrollments they have access to through course offerings.*
- *Can access only the enrollments for offerings with training activities.*
- *Can’t remove themselves from a training activity.*

Community Link https://doc.workday.com/release-notes/en-us/lrn/7856760.html

Learning – Program Completion Logic

A

What's Changing

With the 2024R2 release, Workday updates the program completion logic for new program enrollments where Recognize Previous Completions is selected on all required content items. Now, if a learner has previously completed all required content items, the program automatically completes upon their enrollment and the Completion Date is set to the moment the learner completed the last item in the program, rather than the date of enrollment.

This update applies only to new learning program enrollments. Workday doesn't modify completion records for existing programs.

Additional Considerations

Workday updated the validation rule in Put Learning Enrollment webservice that ensures registration date is before completion date when adding an enrollment. This validation no longer applies to program enrollments and only triggers for enrollments in courses and course offerings.

By removing the validation rule for program enrollments, you may find scenarios where program completion date is recorded before the enrollment date. This is expected behavior, indicating that the learner has previously completed all the required content.

What Do I Need To Do?

Nothing, this feature is automatically available.

What Happens If I Do Nothing?

Workday automatically applies this change to all new program enrollments where Recognize Previous Completions is selected for all mandatory content items.

Community Link https://doc.workday.com/release-notes/en-us/lrn/7813668.html

People Experience

People Experience 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.

People Experience

- Additional Text Formatting for Articles
- AI Enhanced Search
- Blue Buttons Default
- Case Management - Miscellaneous Enhancements
- Enhancements to Journey Category Type User Experience
- Help Article Editor User Interface
- Help Notification Types for Case Management

People Experience - Additional Text Formatting for Articles

A

What's Changing

With this release, Workday now enables you to use additional text formatting options when creating and editing articles.

Additional Considerations

Workday adds these new additional formatting options that you can now use in the Help article editor:

- Undo and Redo functions
- Font sizes
- Font color
- Highlight color
- Text alignment
- Line spacing
- Increased and decreased indentation

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/help/8092848.html

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People Experience - AI Enhanced Search

A

What's Changing

With this release, Workday enables you to search for tasks and reports more quickly by integrating AI into the search user experience.

Additional Considerations

Workday adds a new Simplified Search toggle at the top of the search results page in Workday.

Enabling the Simplified Search toggle:

- Displays the new Top Results which provide the most relevant and personalized search results for the search query entered by the user.
- Displays a new Workday Assistant summary powered by AI in the Top Results on the search results page. The Workday Assistant summary provides personalized results for commonly searched queries such as "my team's hire date" and "my location".

The Tasks and Reports category now displays as the first section below the Workday Assistant summary.

- Moves your search categories to the top of the search results page.
- Adds Learning as a new default category on the search results page if users have not yet customized their search categories.
- Adds a new All Categories menu.
- Moves the View Search Tips and View Help Center options to bottom of the search results page.
- Renames the Configure Search option to Edit Category Preferences and moves it within the All Categories menu.

What Do I Need To Do?

You need to have Workday Assistant enabled in your tenant. Users must belong to a security group that has Get, Put, View, and Modify permissions to the Assistant domain in the System functional area.

What Happens If I Do Nothing?

If you do nothing, your users will see the new search user experience when viewing search results in Workday. Users can switch back to the previous search user experience by clicking the Simplified Search toggle.

Community Link https://doc.workday.com/release-notes/en-us/pex/7996683.html

People Experience - Blue Buttons Default

A

What's Changing

With this release, Workday updates the default color for primary buttons from orange to blue.

Additional Considerations

On the Edit Tenant Setup - System task, select Disable Blue Primary Buttons to change the primary button color to orange. This option will be deprecated in the 25R1 release.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

On the Edit Tenant Setup - System task, select Disable Blue Primary Buttons to change the primary button color to orange. This option will be deprecated in the 25R1 release.

Community Link https://doc.workday.com/release-notes/en-us/uiplatform/8116860.html

People Experience - Case Management - Miscellaneous Enhancements

A

What's Changing

Workday continues enhancing Case Management to improve your efficiency and user experience.

Additional Considerations

In the Help Case workspace, Workday:

- Now displays case IDs for each case, eliminating the need for case solvers to click into a case to view the ID.
- Updates the case type column filter to now display case types alphabetically.

Workday now displays the field values for the Case Type field alphabetically when case solvers change the case type on the case view.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/help/8031045.html

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People Experience - Enhancements to Journey Category Type User Experience

A

What's Changing

With 2024R2, Workday continues to add to the Workday-delivered category type user experience by providing you with the ability to update the category type for existing categories with the Maintain Journey Category Types task.

You must have access to Workday Journeys to use this feature.

Additional Considerations

With this release, Workday delivers a Maintain Journey Category Types task that enables you to map your existing Unassigned categories to Workday-delivered category types.

Workday also adds a Category Types modal that enables you to browse through a carousel displaying all the category types such as Onboarding, Job Transition, Leave of Absence, Offboarding. You can now: (1) Access the Category Types modal through the Journeys Workspace report; (2) Click the arrow Next to view the Category Name and Category Type display grid; (3) Click the Manage category types button to access the Maintain Journey Category Types task; (4) Click the hamburger icon for an unassigned category to display the Workday-delivered category types; (5) Select the category type that maps to the existing category and click OK.

This workflow enables you to associate all unassigned categories to a category type delivered by Workday.

Note: Web Service capabilities for Journeys is coming in a future release. Workday doesn't support Journey Category Type in these SOAP Web Services: Get Journey Categories; Put Journey Category

What Do I Need To Do?

To use this functionality in your tenants, Workday recommends you to update all existing categories to map to a category type using the Maintain Journey Category Types task.

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

What Happens If I Do Nothing?

Existing journeys and categories will continue to function as they are. Workday automatically displays these new features in your tenant.

Community Link https://doc.workday.com/release-notes/en-us/journey/8142799.html

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People Experience - Help Article Editor User Interface

A

What's Changing

With this release, Workday updates the Help article user interface by making it easier to use features and additional text formatting when creating Help articles.

Additional Considerations

In the Help article editor, Workday now:

- Adds new File, Edit, Format, Insert, and View menus.
- Moves the Details and Comments icons from the side panel to the top of the editor.
- Enables you to collapse the side panel.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/help/8145601.html

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People Experience - Help Notification Types for Case Management

A

What's Changing

Workday consolidates existing Help notification types for Case Management and add new Help notification types for Case Management in the Edit Tenant Setup - Notifications task.

Additional Considerations

On the Edit Tenant Setup - Notifications task, Workday removes these notification types on the Help tab:

- Case Type Change
- Assignee Change
- Attachment
- Collaborator Internal Note
- Reply

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

Workday automatically migrates your existing Help notification type configurations, such as routing rules, and applies them to the new correlating Help notification types.

Community Link https://doc.workday.com/release-notes/en-us/help/8095258.html

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People Experience - Help Notification Types for Case Management (cont.)

A

Additional Considerations

On the Edit Tenant Setup - Notifications task, Workday adds these notification types on the Help tab:

- Case Type Change - Notify Case Collaborator
- Case Type Change - Notify Case Owner
- Case Assignee Change - Notify Case Owner
- Case Assignee Change - Notify Case Solver
- Case Attachment - Notify Case Collaborator
- Case Attachment - Notify Case Case Owner
- Case Attachment - Notify Case Solver or Service Team
- Case Internal Note - Notify Case Solver or Service Team
- Case Internal Note - Notify Collaborator
- Case Reply - Notify Case Collaborator
- Case Reply - Notify Case Owner
- Case Reply - Notify Case Solver or Service Team

On the Edit Tenant Setup - Notifications task, Workday renames these notifications on the Help tab and now display them as:

- Case Creation - Notify Case Owner
- Case Service Team Change - Notify Case Owner
- Case Status In Progress/In Review/On Hold - Notify Case Owner
- Case Status Resolved/Canceled - Notify Case Owner
- Archived Case Attachment - Notify Case Solver or Service Team
- Archived Case Reply - Notify Case Solver or Service Team
- Case Solver Digest - Notify Case Solver
- Case External Record Linked or Delinked - Notify Case Solver or Service Team
- Case Sharing - Notify Collaborator
- Case Note Tagging - Notify Collaborator

Community Link https://doc.workday.com/release-notes/en-us/help/8095258.html

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People Experience - Help Notification Types for Case Management (cont.)

A

Additional Considerations

Workday will migrate existing Case Type Change notification type configurations to these new notification types:

- Case Type Change - Notify Case Collaborator
- Case Type Change - Notify Case Owner

Workday will migrate existing Case Assignee Change notification type configurations to these new notification types:

- Case Assignee Change - Notify Case Owner
- Case Assignee Change - Notify Case Solver

Workday will migrate existing Attachment notification type configurations to these new notification types:

- Case Attachment - Notify Case Collaborator
- Case Attachment - Notify Case Case Owner
- Case Attachment - Notify Case Solver or Service Team

Workday will migrate existing Case Internal Note notification type configurations to these new notification types:

- Case Internal Note - Notify Case Solver or Service Team
- Case Internal Note - Notify Collaborator

Workday will migrate existing Reply notification type configurations to these new notification types:

- Case Reply - Notify Case Owner
- Case Reply - Notify Case Solver or Service Team
- Case Reply - Notify Case Collaborator

Community Link https://doc.workday.com/release-notes/en-us/help/8095258.html

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Platform and Product Extensions

Platform and Product Extensions 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.

Platform and Product Extensions

- Help Center in Workday Mobile
- Help Text and Additional Links for Modals
- Jobs Hub for Mobile
- Purge Summary Report
- Related Actions Icon Enhancement
- Sorting Data with Graph API Queries
- View Generated Documents Domains
- Workday Graph API Schema for Extend
- Global Payroll Connect Enhancements
- Integration Event Statuses
- Object Transporter 2.0 Name Change
- Workday Assistant Moving to Search
- Accessibility for Prism Analytics

Platform and Product Extensions - Cancel Business Process Event REST API

A

What's Changing

This feature enables you to easily cancel business processes in your tenant and provides you with greater flexibility to ensure your Workday tenant is configured to meet your business needs.

Additional Considerations

Workday adds a new cancel subresource to the existing businessProcess v1 REST web service, enabling applications to cancel a business process event:

- /events/{ID}/cancel

The subresource is also enabled for Workday Graph API. The eventCancel mutation is secured through the Cancel Security Policy on the business process type and the Business Process Administration security domain. To configure the security domains, access the View Security for Securable Item report in Workday.

Note: Canceling a Shared Participation business process step kicks off a background job. Workday displays an In Progress status instead of a Canceled status in the REST API response.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/efcore/7609904.html

Platform and Product Extensions - Custom Objects REST API

A

What's Changing

Workday updates the Custom Objects v2 REST service, enabling you to submit the Custom Object REST APIs in validate-only mode.

Additional Considerations

When you set the HTTP header x-validate-only to 1, the Custom Object REST APIs only perform validation and doesn't persist data in the tenant.

This update applies to all POST, PUT, DELETE endpoints in the Custom Objects v2 (Multi-Instance and Single-Instance) REST APIs.

What Do I Need To Do?

When you want to submit a Custom Object or Custom Object Definition REST API in validate-only mode, specify this HTTP header in your REST API request:

x-validate-only: 1

What Happens If I Do Nothing?

By default, the Custom Objects REST APIs save the tenant data as specified in the request.

Community Link https://doc.workday.com/release-notes/en-us/co/7698505.html

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Platform and Product Extensions - Display Business Process Step Due Date in User's Time Zone

A

What's Changing

With this release, Workday now displays the due date for completing a business process step in the user's local time zone.

When you configure a due date on a business process step, Workday now displays the due date of the step in the user's local time zone. This enables users to accurately determine when they must complete the step. Workday uses the local time zone of the user if they are located in UTC-1 or greater. This feature doesn't apply to time zones in UTC-2 or less.

To determine a step's due date, Workday now uses the end of day (23:59:59) in Pacific Time Zone (UTC-8) of the system and converts the due date to the user's local time zone.

Workday displays the user's local time zone for the due date in the: (1) Awaiting Your Action section on the Workday Home page; (2) My Tasks item; (3) My Tasks item's Process History; (4) Up Next message; (5) You have submitted dialog box; (6) Due Date column on the View Event page.

This feature doesn't impact existing: Report fields; Standard reports; Web services.

Additional Considerations

The functionality only applies to how Workday displays the due date and not how the system calculates the due date.

Note: If a business process step is configured with a Due Date and the Due Date Is Based On Effective Date check box is also selected on the step or the business process definition as a whole, Workday might add 1 additional day to the due date based on how the system persists the effective date of the business process.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/efcore/7958511.html

Platform and Product Extensions - Enhanced Tab Design

A

What's Changing

Workday delivers an updated tab style that reduces gaps and height, adds visual contrast, and improves framing. Workday streamlines the More menu to show the overflow tabs.

Additional Considerations

A blue underscore indicates the active main tab, while a gray border highlight indicates the sub tab. The More menu now displays only the overflow tabs instead of all tabs.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/uiplatform/8117450.html

Platform and Product Extensions - Enhanced Table Accessibility

A

What's Changing

Workday 2024R2 makes tables more accessible and easier to use with better screen reader support and scroll or pagination options for large tables.

Additional Considerations

Workday makes basic tables compatible with assistive technology. Basic tables are those that enable content updates but don't have any option to select, add, or remove rows.

Screen readers can now announce:

- Column header names while reading across rows.
- Row header names, while reading up or down columns.
- Column sort order, ascending or descending.
- Instructions for sorting a column, when applicable.
- Required fields.

Assistive technology support for more advanced table types is planned for future releases.

Workday also updates the user interface for large tables. For tables with over 30 rows, you can choose to display multiple pages of up to 30 rows each, or display all rows on a single page.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/uicont/7922894.html

Platform and Product Extensions - Error Banner for Modals

A

What's Changing

Workday continues to enhance error modal banners.

Additional Considerations

Workday delivers an enhanced error banner for modals that provides a more concise experience.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/uiplatform/8116882.html

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Platform and Product Extensions - Error Messaging for Docs for Layouts

A

What's Changing

Workday now provides enhanced error messaging to help you resolve data field issues when editing document layouts. Additionally, Workday prevents you from publishing a document layout if errors exist.

Additional Considerations

Workday helps you locate errors that occur by displaying these areas in red in the document layout to call attention to them:

- Dynamic Data tab in the right panel
- Page, Headers, and Footers icons in the left panel
- Language drop-down list in the bottom left

Workday provides error messaging to help you understand why an error occurs. Workday displays a dotted red underline on data fields and hover text for the following issues:

- A data field that no longer exists in the source report.
- When you place two multi-instance (repeating) data fields with different business objects next to each other in a table.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/uxpdf/8165987.html

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Platform and Product Extensions - Form Completion Assistant

A

What's Changing

With this release, Workday enhances the visibility of Form Completion Assistant prompt recommendations by displaying them below supported prompts.

Additional Considerations

Workday also enables the Maintain Machine Learning Prompt Recommendations task to manage prompts supported by the Form Completion Assistant.

Form Completion Assistant is optimized for Universal Main Subscription Agreement subscribers, but all purchasers of relevant SKUs can use it.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/ml/8054136.html

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Platform and Product Extensions - Help Center in Workday Mobile

A

What's Changing

With this release, you can now access Help articles in the Help Center when using the Workday mobile application.

Additional Considerations

Workday adds a new Find Answers section to the Help Center on the Workday Mobile application, enabling you to browse and view Help articles from your mobile device.

Workday also improves the View Case task and Help Center user interface on the Workday mobile application to match the user interface on desktop.

To receive these updates, you must have:

- The Workday mobile application for Android version 2024.26 or higher.
- The Workday mobile application for iOS version 2024.28 or higher.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/help/8143165.html

Platform and Product Extensions - Help Text and Additional Links for Modals

A

What's Changing

With this release, Workday enhances business process help text and additional links to progressively disclose in modals.

Additional Considerations

Workday positions business process help text and additional links under a button that now says Instructional Information. Previously, this content was displayed at the top of the screen.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/uiplatform/8116870.html

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Platform and Product Extensions - Jobs Hub for Mobile

A

What's Changing

With this update, users can now access Jobs Hub on Workday on Android, iPad, and iPhone.

Additional Considerations

Workday delivers Jobs Hub to the Workday mobile experience, enabling employees on mobile to:

- Manage and maintain the current status of the internal job applications.
- Access the Browse Jobs report to search for available jobs.
- Manage and view their job alerts.
- Refer candidates to jobs and view their referral activity.

Workday also removes the Career worklet from the Workday mobile application.

Workday recommends that you use the Jobs Hub worklet to replace the Career worklet.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/uic/8091659.html

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Platform and Product Extensions - Purge Summary Report

What's Changing

Workday enables you to view purge job information for current or terminated worker purge plans.

Additional Considerations

Workday delivers a new Purge Summary Report (secured to the Purge Person Data domain) that you can use to view purge job information for candidate or worker purges, including:

- Who submitted the purge.
- The date and time when a purge was initiated.
- Purge plan type.
- Purgeable data type.
- Purged worker type.
- Functional area.
- Purgeable entities that were successful or ineligible for purging.

You can access the Purge Summary Report by running the Purge Person Data task and clicking the View Purge Person Data Job Monitor link from the Purge Person Data Complete summary page. Once you generate the report, you can select Print to generate a printable PDF of the report.

Report fields will change based on the purge plan or data type you select in the Purge Person Data task. For single entity purges, a new Single Entity Purge tab will display in the report, in place of the Custom Report Details tab.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

A

Community Link https://doc.workday.com/release-notes/en-us/configpriv/7998048.html

Platform and Product Extensions - Related Actions Icon Enhancement

A

What's Changing

With this release, Workday delivers an updated Related Actions icon with a tooltip that improves accessibility.

Additional Considerations

The icon is now blue and oval, providing improved contrast and clarity.

What Do I Need To Do?

The new color and style is enabled by default. To revert to the orange Related Actions icon, access the Edit Tenant Setup - System task and select Opt-out for Related Actions Charms Component Uplift. This option will be deprecated in the 25R1 release.

What Happens If I Do Nothing?

The Related Actions icon defaults to the new blue color, style, and tooltip functionality. We will add this new look to Search results in a future release.

Community Link https://doc.workday.com/release-notes/en-us/uiplatform/8119307.html

Platform and Product Extensions – Sorting Data with Graph API Queries

A

What's Changing

With this update, Workday improves Workday Graph API with sorting capabilities that return data in a specified order.

Additional Considerations

Workday adds the orderBy argument to Graph API queries, enabling Extend developers to sort query results by the specified fields in ascending or descending order. Workday supports sorting by a maximum of 10 fields that are of these types: String, Integer, Float, ID, Instant, or LocalDateTime.

To use the orderBy argument in a query, specify this format:

orderBy: [{sortField1:ASC|DESC},{sortFieldN:ASC|DESC}]

The brackets are optional if you specify only 1 sort field.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/tri/7728759.html

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Platform and Product Extensions – View Generated Documents Domains

A

What's Changing

Workday renames domains that secure generated documents on worker profiles.

Additional Considerations

For consistency, Workday renames domains that secure generated documents on worker profiles:

- Self-Service: View Generated BIRT documents to Self-Service: View Generated Documents
- Worker Data: View Generated BIRT documents to Worker Data: View Generated Documents

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/doceng/8126255.html

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Platform and Product Extensions – Workday Graph API Schema for Extend

A

What's Changing

Workday continues to grow the Graph API schema, providing Extend apps access to more business object queries and mutations using Workday Graph API.

Additional Considerations

Event Cancel Mutation

Workday adds the new eventCancel mutation, enabling Extend developers to cancel a business process event using Workday Graph API. The eventCancel mutation is secured through the Cancel Security Policy on the business process type and the Business Process Administration security domain.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/tri/8117515.html

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Platform and Product Extensions – Global Payroll Connect Enhancements

A

What's Changing

Manage global payroll processing across the globe by reviewing in near real-time global payroll related information with a single view from multiple payroll vendors.

Note: We plan to deliver new functional area, product, and Core Data Management tags for this functional area in a future update. You may notice discrepancies in the tags and functional area fields of the Release Center and the What's New in Workday report for this feature.

Additional Considerations

Workday delivers a new Global Payroll Connect functional area for these Global Payroll Connect domains and all Cloud Connect for Third Party Payroll domains:

- Manage: Data Changes on Demand
- Manage: Global Payroll Processing
- Manage: Global Payroll Inbound Notifications
- Manage: Global Payroll Processing
- Reports: Data Changes on Demand Results
- Self-Service: Payroll Interface (Additional Payroll Data)
- Worker Data: Payroll Interface (Additional Payroll Data)
- View: Global Payroll Hub

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/payexternal/8220171.html

Platform and Product Extensions – Integration Event Statuses

A

What's Changing

With this update, Workday enhances the performance and usability of Workday integrations by improving the accuracy of our integration event statuses.

Additional Considerations

Now, if an integration reaches a timeout limit, Workday displays a Failed status instead of a Completed with Errors status. For integration events with a Failed status, we recommend checking the integration logs, troubleshooting any issues and then rerunning the integration.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/icp/7045090.html

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Platform and Product Extensions – Object Transporter 2.0 Name Change

A

What's Changing

Workday continues to improve your user experience with Object Transporter 2.0 by removing the 2.0 from the Object Transporter name.

Additional Considerations

With this update, Workday renames:

- Object Transporter 2.0 to Object Transporter.
- OX 2.0 to OX.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/datasvc/7878801.html

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Platform and Product Extensions – Workday Assistant Moving to Search

A

What's Changing

With 2024R2, Workday brings Workday Assistant capabilities into Search.

Additional Considerations

With 2024R2 Workday:

- Hides the floating Workday Assistant button. You can still access Assistant using the chat icon in the top Application Header bar next to Notifications and My Tasks.
- Integrates Workday Assistant capabilities and natural language processing into Search.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

The Workday Assistant floating chat button is now hidden until you open the chatbot window using the chat icon in the Application Header bar.

Community Link https://doc.workday.com/release-notes/en-us/wdayassist/8035591.html

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Platform and Product Extensions - Accessibility for Prism Analytics

A

What's Changing

Workday continues to provide a more consistent user experience for all users by making Prism Analytics more accessible. This enables more users to access, use, and enjoy Workday.

Additional Considerations

Workday improves accessibility for Prism Analytics tasks and reports by adhering to the Web Content Accessibility Guidelines 2.1. Workday improve keyboard navigation, focus order, and screen reader compatibility in these stages in the Edit Transformations task:

- Filter
- Group By

Workday also changed the keyboard shortcuts for the table view in the View Dataset Details and View Table Details reports, improving keyboard navigation. You can now:

- Navigate from the page to the table using the tab key.
- Focus on elements inside cells using the tab key.
- Open components in cells using either the enter key or bottom arrow key
- Select either a cell or column using either a spacebar or the enter key.

What Do I Need To Do?

This feature is automatically available.

What Happens If I Do Nothing?

No change.

Community Link https://doc.workday.com/release-notes/en-us/prism/8156185.html

Recruiting

Recruiting 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.

Recruiting

- Automatic Stage Routing for Multiple Steps
- Candidate Home Job Alerts
- Candidate Home My Application Redesign
- Candidate Home Tasks
- Collective Agreements in Job Requisition
- Core Connector: Candidate Outbound
- External Career Site Job Applications
- External Career Site Prospect Consent Collection
- Undo Move for Multiple Candidates
- View and Review Documents on Candidate Home

Recruiting - Automatic Stage Routing for Multiple Steps

A

What's Changing

With this update, Workday enables you to toggle automatic stage routing on multiple steps of the sub-processes of the Job Application business process.

Additional Considerations

You can now toggle automatic stage routing on multiple steps in any of these business processes:

- Assess Candidate
- Background Check
- Employment Agreement
- Interview
- Offer
- Reference Check
- Review
- Candidate
- Screen

What Do I Need To Do?

Nothing. This feature is automatically available.

What Happens If I Do Nothing?

This feature is automatically available. You won't experience any changes except for the ability to add Automatic Stage Routing on multiple steps in the Job Application sub-processes

Community Link https://doc.workday.com/release-notes/en-us/efcore/7864658.html

Recruiting - Candidate Home Job Alerts

A

What's Changing

With this release, Workday updates the Candidate Home framework to deliver usability and accessibility enhancements for external candidate job alerts. This feature increases candidate engagement by providing a responsive and flawless experience for candidates creating or managing job alerts.

Additional Considerations

To improve the candidate experience, Workday provides a more intuitive design for Job Alert tasks. WD enables a side panel for Job Alerts when external candidates create and edit their job alerts within their Candidate Home. These tasks display on the right side of the page:

- Create Job Alert
- Edit Job Alert

Workday updates the Delete Job Alert task to display as a pop-up modal instead of a separate page.

What Do I Need To Do?

No steps need to be taken. This feature is automatically available.

What Happens If I Do Nothing?

No steps need to be taken. This feature is automatically available.

Community Link https://doc.workday.com/release-notes/en-us/cxs/8050116.html

Recruiting - Candidate Home My Application Redesign

A

What's Changing

With this release, Workday updates the Candidate Home framework to deliver usability and accessibility enhancements for external candidate My Application actions.

Additional Considerations

To improve the candidate experience, Workday provides a more intuitive design for My Application tasks. Workday enables a side panel for Candidate Home users when they use related actions on their job applications. These new reports now display on the right side of your page:

- View Application
- View Completed Tasks

Workday updates these tasks to display as pop-up modals instead of a separate page.

- Withdraw Job Application
- Delete Job Application

What Do I Need To Do?

No steps need to be taken. This feature is automatically available.

What Happens If I Do Nothing?

No steps need to be taken. This feature is automatically available.

Community Link https://doc.workday.com/release-notes/en-us/cxs/8097810.html

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Recruiting - Candidate Home Tasks

A

What's Changing

With this release, Workday updates the Candidate Home framework to deliver usability and accessibility enhancements for candidates completing questionnaires, assessments, and veteran's status tasks.

Additional Considerations

Workday redesigns these tasks on Candidate Home and now display them as pop-up modals instead of separate pages:

- Complete Questionnaire
- Take Candidate Assessment
- Update Candidate U.S. Veteran Status

When a candidate completes any of these tasks, Workday displays the task confirmation message, as well as any remaining tasks in the same pop-up modal.

Workday also now support rich text formatting for questions and questionnaire text in the Complete Questionnaire task.

What Do I Need To Do?

No steps need to be taken. This feature is automatically available.

What Happens If I Do Nothing?

No steps need to be taken. This feature is automatically available.

Community Link https://doc.workday.com/release-notes/en-us/cxs/7070126.html

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Recruiting - Collective Agreements in Job Requisition

A

What's Changing

Workday updates Compensation report fields to support collective agreements in the Job Requisition business process.

Additional Considerations

Workday 2024R2 updates these report fields to support collective agreements in the Job Requisition business process. If there is an assigned collective agreement, Workday uses eligibility rules from the collective agreement and the job requisition to return compensation values.

- Collective Agreement (Compensation)
- Collective Agreement Area (Compensation)
- Collective Agreement Class (Compensation)
- Collective Agreement Coefficient (Compensation)
- Collective Agreement Group (Compensation)
- Collective Agreement Level (Compensation)
- Collective Agreement Position (Compensation)
- Collective Agreement Professional Category (Compensation)
- Collective Agreement Rating (Compensation)
- Collective Agreement Step (Compensation)

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/hrcomp/7996681.html

Recruiting - Core Connector: Candidate Outbound

A

What's Changing

With this update, Workday enhances the Core Connector: Candidate Outbound integration to deliver more output delivery options and also return additional recruiting data, providing more detail to aid in candidate change detection and more clarity with additional fields in the Process History.

Additional Considerations

Workday delivers these new integration services to the integration template that you can enable to specify the output location of an integration file and to enable a unique name for each output file for the integration:

- Core Connector: Candidate Outbound - Delivery Service
- Core Connector: Candidate Outbound Sequence Generator Service

What Do I Need To Do?

Nothing. These enhancements are optional and automatically available to use with the Core Connector: Candidate Outbound integration.

What Happens If I Do Nothing?

No steps need to be taken. This feature is automatically available.

Community Link https://doc.workday.com/release-notes/en-us/hrrec/8066766.html

Recruiting - External Career Site Job Applications

A

What's Changing

With this release, Workday updates the external career site framework to deliver usability and accessibility enhancements for the apply flow.

Additional Considerations

Workday redesigns the apply flow to improve:

- The accessibility for job applications.
- The experience of using assistive technologies for all pages of the application.

Workday also delivers several improvements to the job application user experience on external career sites in the following areas:

- Job Application Accessibility and User Experience
- Default Country on My Information Page
- Questionnaires
- Personal Information Prompt on Non-U.S. Applications
- Candidate Home Account
- Social Network URLs
- Branding for Specialties Label

What Do I Need To Do?

For 2024R2 Production, you will need to opt in to the External Career Site Apply Flow Improvements feature using the Maintain Feature Opt-Ins report for these changes to apply to your external career sites. You will still automatically be opted in to the feature in your Preview tenants.

What Happens If I Do Nothing?

You will not find any difference on the apply flow in the external career site.

Community Link https://doc.workday.com/release-notes/en-us/cxs/5853901.html

Recruiting - External Career Site Prospect Consent Collection

A

What's Changing

With this release, Workday updates the external career site framework to deliver usability and accessibility enhancements for prospect consent

Additional Considerations

Workday delivers button improvements for the prospect consent user experience:

- Button labels are now Cancel and Submit.
- We move the buttons to display on the right side of the page.

You can't unpublish the career site selected for prospect consent in the Maintain Prospect Consent task.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/cxs/7948602.html

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Recruiting - Undo Move for Multiple Candidates

A

What's Changing

With this update, Workday enables you to undo moving multiple candidates forward, returning them to the previous stage of the job application process.

Additional Considerations

Workday delivers a new Mass Undo Move Job Application task (secured to the Undo Move Candidate domain) that you can use to return multiple candidates to their previous stage and step of the Job Application business process.

You can access this task using with the new Undo Move action in the candidate list grid.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/hrrec/8020324.html

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Recruiting - View and Review Documents on Candidate Home

A

What's Changing

Workday enhances the candidate experience with a more intuitive design for the View Review Document task on the external career site. This enables candidates to easily navigate, engage with, and review all the documents they've previously accessed during the job application process.

Additional Considerations

Workday adds a new pop-up modal on the Completed tab of the Review Document task, making it easier for candidates to:

- Download or Open the documents.
- Scroll within the pop up when there are multiple documents.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/cxs/7536232.html

Security

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

- Compensation Security Enhancements
- Accounting Source Analytics Data Source Security Configuration
- Compensation Security Enhancements
- Enhanced Security for Travel Booking Data
- Learning Assignments Security Update
- Role-Based Security for Transfer Credit
- Role-Based Security Reporting
- Security Domains for Transfer Credit
- Security for Personal Information Items
- Security for Worker ID (REST) and Employee ID Report Fields
- Unsupported Security Group Access to Supplier Contract Reporting Data Sources
- Worksheets Expanded Sharing Options for Security

Security - Compensation Security Enhancements

A

What's Changing

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

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

Security - Accounting Source Analytics Data Source Security Configuration

A

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

Edit Accounting Source Prism Data Source Security Task

Workday now delivers 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.

View Accounting Source Prism Data Source Security Report

Workday now delivers 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?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/finac/8056116.html

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Security - Enhanced Security for Travel Booking Data

A

What's Changing

With the 2024R2 release, Workday has enhanced security for travel booking files imported from travel management companies, enabling you to provide users with only unconstrained access to travel booking files.

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*
- *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 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 https://doc.workday.com/release-notes/en-us/finexp/8079700.html

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Security - Enhanced Security for Travel Booking Data (cont.)

A

Additional Considerations

Workday delivers 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.

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

- 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 https://doc.workday.com/release-notes/en-us/finexp/8079700.html

Security – Learning Assignments Security Update

A

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.

Security:

Workday secures 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 don't change your security setup, you will see no changes.

Community Link

https://doc.workday.com/release-notes/en-us/lrn/7960813.html

Security – Learning Assignments Security Update (cont.)

A

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.

Workday delivers 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:

Name	Description	Security
Learner's Location (Current)	The current location for the learner.	*Self Service: Learning* *Reports: Learning Record* *Person Data: Learning*
Learner's Extended Enterprise Affiliation (Current)	The current extended enterprise affiliation for the learner.	*Self Service: Learning* *Reports: Learning Record* *Person Data: Learning*
Learner's Supervisory Organization (Current)	The current supervisory organization for the learner.	*Self Service: Learning* *Reports: Learning Record* *Person Data: Learning*

Community Link https://doc.workday.com/release-notes/en-us/lrn/7960813.html

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Security - Role-Based Security for Transfer Credit

A

What's Changing

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

Workday updates these domains to support role-based security for transfer credit:

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

On these domains, Workday adds these allowed security groups, in addition to the existing allowed security group types:

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

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.

Workday also updates 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

Additional Considerations

N/A

What Do I Need To Do?

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

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stuops/7729494.html

Security - Role-Based Security Reporting

A

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

- The report is available on mobile but we recommend that you view it on desktop.
- A Security Granted entry is always logged when a new hire is created to provide a complete staffing audit trail. If the hire is not assigned to a role-based security group during the hire, these entries indicate no security impact.
- For every future role assignment snapshot that a worker is on, there is an entry logged as Security Granted. Workday recommends reviewing the security change reason details column in these scenarios.
- By default, the report doesn't return entries which don't impact role-based security.
- Please be aware in phase 1, that additional entries are not created if staffing transactions are corrected or rescinded after the event is completed.

What Do I Need To Do?

This feature is automatically available. Workday recommends 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.

Community Link https://community.workday.com/node/1184009

Security - Role-Based Security Reporting (cont.)

A

Additional Considerations

- 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.

Community Link https://community.workday.com/node/1184009

Security - Security Domains for Transfer Credit

A

What's Changing

Workday reorganizes the security domain structure for some transfer credit domains and tasks for consistency.

Additional Considerations

Security Domains: For consistency with existing Workday domains, Workday renames the Manage: Transfer Credit Rules domain to Set Up: Transfer Credit Rules.

Workday updates these domains so they are no longer subdomains of the Manage: Student Transfer Credit domain:

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

Workday also delivers a conversion so that security policies on these domains are independent and no longer inherit from the Manage: Student Transfer Credit domain.

Tasks and Reports: Workday now secures these tasks and reports to the Set Up: Transfer Credit Rules domain instead of Manage: Student Transfer Credit:

- 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

Community Link https://doc.workday.com/release-notes/en-us/stuops/7522923.html

Security - Security Domains for Transfer Credit (cont.)

A

Additional Considerations

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

Web Services: Workday removes 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.

Workday secures 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. Workday recommends 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?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stuops/7522923.html

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Security - Security for Personal Information Items

A

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

Note: Please refer to the community link for extensive list of additional considerations

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

This feature will be Automatically Available in Production with Workday Release 24R2

Community Link https://doc.workday.com/release-notes/en-us/hrpersoninf/8130946.html

Security - Security for Worker ID (REST) and Employee ID Report Fields

A

What's Changing

Workday updates the security for the Worker ID (REST) and Employee ID report fields.

Additional Considerations

Workday now secures 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
- 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?

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

What Happens If I Do Nothing?

Nothing. This feature is automatically available.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/8165385.html

Security - Unsupported Security Group Access to Supplier Contract Reporting Data Sources

A

What's Changing

With the 2024R2 release, Workday enables greater access to the Supplier Contract Lines report data source for security groups.

Additional Considerations

Workday updates the Supplier Contract Lines data source filter to evaluate security for these security groups:

- Intersection
- Supplier Contract Specialist for Supplier Contract
- Unconstrained

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.

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

Workday delivers 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?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/smcoco/8049584.html

Security - Worksheets Expanded Sharing Options for Security

A

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.

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.

Note: This functionality is only available to Analytics and Reporting Preview customers currently. Workday plans to deliver this to all customers on September 21, 2024.

Additional Considerations

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 per mission 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 https://doc.workday.com/release-notes/en-us/uxbi/7718849.html

Student

Student 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.

Student

- 1098-T Tax Reporting
- Academic Requirement Assignments Web Service
- Academic Unit Reorganization Conflicts
- Course and Course Section Prompts
- Course Section Instructor Details
- Course Tag Categories for Multiple Institutions
- Course Versions for Student Registrations
- External Student Site Branding Colors
- External Student Transcript Web Services
- Friends and Family for Workday Student
- Inheritance for Academic Policies
- Machine Learning for Workday Student
- Manage Program Completion
- Multiple Academic Periods for Saved Schedules
- New Report for Student Sponsor Contracts
- Performance Improvement for Generate Pending Student Refunds
- Preliminary Transfer Credit Troubleshooting Console
- Privacy Preferences Reporting
- Recalculate Student Sponsor
- Registration Appointments for Multiple Institutions
- Reporting Enhancements
- Review Application Page
- Role-Based Security for Transfer Credit
- Security Domains for Transfer Credit
- Student Event History
- Student Payment Application Lock
- Student Payment Precedence Charge Item Selection
- Student Transfer Credit Troubleshooting Console
- View Saved Schedules for Student Registrations

Student - 1098-T Tax Reporting

A

What's Changing

Workday enables you to generate 1098-T forms for the 2024 calendar year. This update enables your students to claim tax credits for qualified educational expenses in 2024. Workday also updates print layout formatting to help you maintain compliance with the Internal Revenue Service (IRS).

Additional Considerations

Workday makes 2024 available in the calendar year prompt on these tasks and reports, enabling you to manage the creation of your 1098-T forms for this calendar year:

- Create 1098-T Run
- Edit Student 1098-T
- Generate Student 1098-T
- Maintain 1098-T Options
- Manage Consent for Removal from 1098-T Mass Print
- Manage Paperless 1098-T
- Mass Print 1098-T Forms
- Print 1098-T
- Print My 1098-T
- View My 1098-T
- View Student 1098-T

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stufin/7993948.html

Student - Academic Requirement Assignments Web Service

A

What's Changing

Workday enhances the Get Academic Requirement Assignments web service with request parameters and validation messages.

Additional Considerations

Workday updates the Get Academic Requirement Assignments web service (secured to the Set Up: Academic Requirements Configurations domain) to retrieve all academic requirement assignments for the configuration nodes that the user has access to.

Users must specify no more than 1 of these request criteria when retrieving assignments: Academic Unit and Academic Level, Program of Study, Program Area, or Program Focus.

Workday adds validation messages if you don't specify 1 valid:

- Academic unit and academic level combination.
- Program of study.
- Program area.
- Program Focus where the Program of Study Type Category is Program Focus and is associated with a parent Program of Study.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stuadv/7741932.html

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Student - Academic Unit Reorganization Conflicts

A

What's Changing

With this release, Workday provides framework updates that help you in reorganizing your academic unit structure by providing a report that lists all the objects that prevent you from assigning a new superior.

Additional Considerations

View Academic Unit Reorganization Conflicts

Workday adds the new View Reorganization Conflicts button on the Assign Superior Academic Unit task that displays the new View Reorganization Conflicts for Academic Units report.

From the academic unit, you can access this task as a related action by selecting Academic Unit > Assign Superior. After you select a new Superior, click the View Reorganization Conflicts button to view any conflicts that prevent you from assigning the new Superior.

Workday also updates the request parameters and validations for the Put Academic Unit webservice to support this functionality.

What Do I Need To Do?

The View Reorganization Conflicts for Academic Units and View Reorganization Conflicts for Programs of Study reports are available for all customers during academic unit or program of study reorganizations.

What Happens If I Do Nothing?

You won't be able to use this feature. The View Reorganization Conflicts for Academic Units and View Reorganization Conflicts for Programs of Study reports won't be available.

Community Link https://doc.workday.com/release-notes/en-us/stuaf/7303250.html

Student - Academic Unit Reorganization Conflicts (cont.)

A

Additional Considerations

View Program of Study Reorganization Conflicts

Wokday adds the new View Reorganization Conflicts for Programs of Study task to enable you to view conflicts that prevent you from assigning a new superior academic unit for a program of study.

From the program of study, you can access this task as a related action by selecting Program of Study > View Blocking Data. On the View Reorganization Conflicts for Programs of Study task, select from these prompts to assign a new superior academic unit and level:

- Target Owning Academic Unit
- Target Owning Academic Level

Review the potential reorganization conflicts.

Workday also updates the request parameters and validations for the Put Program of Study webservice to support this functionality.

Community Link https://doc.workday.com/release-notes/en-us/stuaf/7303250.html

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Student - Course and Course Section Prompts

A

What's Changing

Workday continues to enhance the curriculum management functionality to support multiple institutions partitioning.

Additional Considerations

Workday updates the Course prompt on these tasks and reports to now only display course subjects that you have access to:

- Create Course Section
- Manage Offerings for Course
- View Offerings for Course

Workday update the Equivalent Courses prompt on the Add Course Equivalency Group task to now only display course subjects that you have access to.

Workday update the Exclude Course Sections prompt on the Release Remaining Reserved Capacity task to now only display course subjects that you have access to.

Workday updates the Student Courses by Subject Approved or Pending Update, Secured prompt on these tasks to now only display courses with course subjects that you have access to:

- Add Course Equivalency Group
- Edit Course Equivalency Group

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stucurr/7792549.html

Student - Course and Course Section Prompts (cont.)

A

Additional Considerations

Workday updates the Student Courses having Sections in Academic Period for Cluster Secured prompt on the Maintain Course Section Clusters task to now only display courses to cluster with course subjects that you have access to.

Workday updates the Co-Requisite Courses prompt on these tasks to now only display courses with course subjects that you have access to:

- Create Course
- Edit Course
- Edit Course Version
- Review Course
- Revise Student Course Event

Workday updates the Student Course Registration Records by Section report data source (RDS) filter on the Student Course Registration Records RDS.

Workday updates the Student Course Sections (Secured by Domain) prompt to now only display course subjects for course sections that you have access to.

Workday updates the Course Section prompt on the Cancel Course Section task to now only display published course section definitions that you have access to.

Community Link https://doc.workday.com/release-notes/en-us/stucurr/7792549.html

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Student - Course and Course Section Prompts (cont.)

A

Additional Considerations

Workday updates the Course Section prompt on these tasks to now only display published course sections that you have access to:

- Edit Published Course Section
- Maintain Custom Meeting Pattern for Published Course Section
- Verify Participation

Workday updates the By Course Section prompt on the Find Available Instructional Locations task to now only display course subjects for course sections that you have access to.

Workday updates the Course Section prompt on these tasks to display course subjects for course sections that you have access to:

- Maintain Scheduled Assessments
- Maintain Section Listings for Course Section
- View Course Section Roster

Community Link https://doc.workday.com/release-notes/en-us/stucurr/7792549.html

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Student - Course Section Instructor Details

A

What's Changing

Workday enables administrators to create custom reports to view instructor details per instructor role assignment by course section.

Additional Considerations

Report Fields

Workday delivers these new report fields on the Course Section Definition business object (secured to the Public: Curriculum Management domain) that you can use in custom reports:

- Published Instructor Roles
- Single Instructor Role Assignments

Workday also delivers these new report fields on the new Single Instructor Role Assignment business object (secured to the Public: Curriculum Management domain) that you can use in custom reports:

- Academic Appointee
- Role Assignment

Example

To report on details per instructor, you can use the single role instructor assignment as a related business object in custom reports. For example, to report on the role for the instructor, you can create a calculated field to look up instructor role from the role assignment.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stucurr/7747507.html

Student - Course Tag Categories for Multiple Institutions

A

What's Changing

To support multiple institutions partitioning, you can now use the same name for course tag categories across multiple institutions.

Additional Considerations

View Course Tag Category Report

Workday delivers a new View Course Tag Category report (secured to the new Set Up: Course Tag Categories subdomain), enabling you to view course tag categories that you have access to.

Workday also delivers a new Course Tag Categories report data source (secured to the new Set Up: Course Tag Categories subdomain) that you can use to generate a list of course tag categories and related data.

Workday also adds a new In Use report field on the Course Tag Category business object (secured to the new Set Up: Course Tag Categories subdomain), which you can use in custom reports.

Maintain Course Tag Categories Task

Workday delivers a new Delete Course Tag Category task that you can access from the related actions menu of the Maintain Course Tag Categories task so that you can delete course tag categories that are not in use.

What Do I Need To Do?

To use the web service functionality, you must update the web service to v43.0 or later.

What Happens If I Do Nothing?

You won't be able to use the web service functionality, if you don't update your web services to v43.0 or later.

Community Link https://doc.workday.com/release-notes/en-us/stucurr/7433754.html

Student - Course Tag Categories for Multiple Institutions (cont.)

A

Additional Considerations

Workday now secures the Maintain Course Tag Categories task to the new Set Up: Course Tag Categories subdomain in addition to its existing domains, allowing users to edit course tag categories relevant to their institution.

Edit Course Tag Categories Task

Workday now adds a warning to the Edit Course Tag Categories task when you remove an Institution from a shared course tag category if the course tag category is already in use at that institution.

Web Services

For consistency, Workday also updates these web services to support only enabling access to the course tag categories that you have access to:

- Get Student Course Tag Categories
- Put Student Course Tag Category

Workday also now secures these web services to the new Set Up: Course Tag Categories subdomain in addition to their existing domains.

Note: To use this functionality, you must update the web service to v43.0 or later.

Community Link https://doc.workday.com/release-notes/en-us/stucurr/7433754.html

Student - Course Versions for Student Registrations

A

What's Changing

Workday now displays course information based on the start date of the academic period that a student plans to complete the course.

Additional Considerations

When students access these tasks, Workday now displays course versions based on the academic period that the student plans to complete the course:

- Add Course To Schedule
- Create Student Registration Saved Schedule
- Edit Student Registration Saved Schedule
- Register for Course
- Register for Course Section
- Register from Saved Schedule
- Register from Academic Plan
- Remove Student Registration Saved Schedule
- Swap New Course
- Swap New Section
- View Student Registration Saved Schedule

What Do I Need To Do?

Workday recommends you configure course effective dates to be the same as or before the standard start date of the academic period offering a new course version.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stureg/7830725.html

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Student - Course Versions for Student Registrations (cont.)

A

Additional Considerations

When you access these tasks, Workday now displays course versions based on the academic period that the student plans to complete the course:

- Drop Student Course Registration
- Edit Student Course Registration
- Troubleshoot Registration
- Withdraw Student Course Registration

Workday also updates the Registration Waitlist Availability Event business process (secured to the Student Records functional area) to also display the most relevant course versions for students.

Community Link https://doc.workday.com/release-notes/en-us/stureg/7830725.html

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Student - External Student Site Branding Colors

A

What's Changing

Workday now requires branding colors for external student sites.

Workday updates these tasks to require colors for certain parts of headers, primary buttons, and secondary buttons:

- Create Student External Site Brand
- Edit Student External Site Brand

Additional Considerations

Workday prepopulates the required colors with default Workday color values. Optional colors remain blank until you specify values for them.

What Do I Need To Do?

You don't need to do anything, this feature is automatically available.

What Happens If I Do Nothing?

Workday automatically populates required colors with default Workday values.

Community Link https://doc.workday.com/release-notes/en-us/stups/7830245.html

Student - External Student Transcript Web Services

A

What's Changing

Workday continues to enhance web service functionality for importing external transcripts for students.

Additional Considerations

Workday updates these web services to increase flexibility for specifying educational institution courses: Import External Student Transcripts; Put External Student Transcript

On these web services, you can now specify an external course on the request by either:

- Course ID and Course Title.
- Educational Institution Course Reference ID.

Workday now also:

- Checks that the educational institution course references belong to the educational institution of the transcript.
- Enables you to specify an educational credential that belongs to the institution of the transcript.

Note: To use this functionality, you must update the web services to v43.0 or later.

What Do I Need To Do?

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

What Happens If I Do Nothing?

N/A

Community Link

https://doc.workday.com/release-notes/en-us/stuops/7619284.html

Student - Friends and Family for Workday Student

A

What's Changing

With this release, Workday continues to improve the student friends and family process.

On the Add My Friends and Family task, Workday ensures that students first assign relationship type(s) and contact method(s) if you set them up as required on the Configure Required Friends and Family for Student task.

Workday also adds hover text to the Add Friends and Family and Edit Friends and Family tasks to indicate that you and your students can:

- Select multiple relationship types for each friend or family member.
- Select the Is Third Party User check box if you want to manage the information a friend or family has access to on the Manage permissions for Third Party task.

Additional Considerations

Workday now also includes the country associated with friends and family addresses on the Contact for Student profile group.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stucore/7784053.html

Student - Inheritance for Academic Policies

A

What’s Changing

You can now cancel additional policies defined on academic unit level configurations and programs of study, and restore inheritance from a superior academic unit.

Workday updates these tasks to enable you to inherit these policies from the superior academic unit and configure the superior policy to apply to the subordinate policy as of a specified effective date:

Recruiting and Application Policies:

- Maintain Delay Student External Account Creation Policy
- Maintain Student Applicant Score Calculation Policy
- Maintain Student Application GPA Calculation Policy

Evaluation and Decision Policies

- Maintain Application Verification Policy
- Maintain Campus Location Decision Policy
- Maintain Preliminary Admission Recommendation Policy
- Maintain Program of Study Decision Policy

When a subordinate academic unit has a different policy than the superior academic unit, you can now configure the superior policy to apply to the subordinate academic unit as of a specified effective date.

Community Link

https://doc.workday.com/release-notes/en-us/stups/7443568.html

cognizant

Student - Inheritance for Academic Policies (cont.)

A

What's Changing

On these tasks, Workday adds a new section labeled What would you like to do?, and include these options:

- Inherit from Superior Academic Unit, enabling you to cancel the policy and reinherit the policy from the superior academic unit.
- Create New Policy or Edit Existing Policy, enabling you to create a new policy for the subordinate academic unit or maintain the existing policy.

If you select an academic unit and academic level that is already inheriting from a superior academic unit:

- The option defaults to Create New Policy or Edit Existing Policy.
- If you attempt to select the Inherit from Superior Academic Unit option, Workday displays the message that you're already inheriting from the superior academic unit policy.

Note: You can only reinherit a policy from a superior academic unit if the policies are equivalent. Workday considers policies equivalent if they have the same:

- Academic calendars.
- Typical attendance patterns.
- Unit types.

Community Link https://doc.workday.com/release-notes/en-us/stups/7443568.html

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Student - Inheritance for Academic Policies (cont.)

A

What's Changing

Web Services: Workday also updates these corresponding web services of the above mentioned policies to enable inheritance from the superior academic unit:

Recruiting and Application Policies:

- Get Delay Student External Account Creation Policy
- Put Delay Student External Account Creation Policy
- Get Student Applicant Score Calculation Policy
- Put Student Applicant Score Calculation Policy
- Get Student Application GPA Calculation Policy
- Put Student Application GPA Calculation Policy

Evaluation and Decision Policies:

- Get Application Verification Policy
- Put Application Verification Policy
- Get Campus Location Decision Policy
- Put Campus Location Decision Policy
- Get Preliminary Admissions Recommendation Policy
- Put Preliminary Admissions Recommendation Policy
- Get Program of Study Decision Policy
- Put Program of Study Decision Policy

Additional Considerations

N/A

What Do I Need To Do?

The functionality to have a policy canceled and to inherit from the superior academic unit is available through a boolean on the policy. Update the policy configuration to utilize this functionality.

What Happens If I Do Nothing?

The functionality will not be applied to policies without deliberate policy configuration changes.

Community Link https://doc.workday.com/release-notes/en-us/stups/7443568.html

cognizant

Student - Machine Learning for Workday Student

A

What's Changing

Workday provides you with Form Completion Assistant prompt recommendations based on your most recently and frequently used selections. Workday also enables a data entry check capability to proactively validate amount fields on certain tasks and alert you when the values are outside of historical norms.

Additional Considerations

Workday now displays Form Completion Assistant prompt recommendations on these tasks:

- Add Student Note
- Create Student Eligibility Rule
- Edit Cost of Attendance
- Edit Total Financial Assistance
- Run Student Financial Process by Period

Workday now also displays Data Entry Check on these tasks:

- Apply Student Charge
- Edit Class Standing Overrides
- Edit Cost of Attendance
- Edit Load Status Overrides
- Edit Total Financial Assistance
- Manage Instructor Course Section Load
- Record Student Waiver Payment

What Do I Need To Do?

Data Entry Check and Form Completion Assistant are enabled by default in your tenant. These features may take approximately 1 week to gather your tenant data and begin to display.

To opt out of Form Completion Assistant, clear the Enable Machine Learning Recommendations check box for these fields in the Student product area on the Maintain Machine Learning Prompt Recommendations task:

- Note Topic to disable the Add Student Note task.
- Academic Unit to disable the Create Student Eligibility Rule task.
- Academic Period to disable the Edit Cost of Attendance task.

Community Link https://doc.workday.com/release-notes/en-us/stucore/7636007.html

Student - Machine Learning for Workday Student (cont.)

A

What Do I Need To Do?

- Awards to disable the Edit Total Financial Assistance task.
- Start Date Within to disable the Register Student for Course task.
- Academic Year to disable the Run Student Financial Process by Period task.

To opt out of Data Entry Check, clear the Switch on Data Entry Check Everywhere check box on the Edit Tenant Setup - Student task.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stucore/7636007.html

cognizant

Student - Manage Program Completion

A

What's Changing

With this release, you can mass update program completion statuses and mass complete programs.

Additional Considerations

With this release, Workday removes the limitation for processing program of study records. You can now select and process more than 1,000 program of study records at a time.

Workday delivers a new Manage Program Completion search report (secured to the Manage: Program Completion Progress domain), enabling you to view and manage program completions by academic unit and academic level.

Workday also delivers a new Program of Study Records for Program Completion Progress report data source (RDS) filter on the Student Program of Study Records RDS. This enables you to view the student's status towards program completion.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/sturec/7791726.html

cognizant

Student - Manage Program Completion (cont.)

A

Additional Considerations

Workday also delivers these new report fields on the Student Program of Study Record business object (secured to the Manage: Program Completion Progress domain) that you can use in condition rules and custom reports:

- Cumulative Overall GPA including Transfer Registrations
- Cumulative Units Earned including Transfer
- Legal First Name
- Legal Last Name
- Non-Discontinued Primary or Stackable Student Program of Study Record
- Preferred First Name
- Program of Study Record GPA
- Program of Study ~ Units (stu)~ Earned

Workday appends (Do Not Use) to the name of the Manage Program Completion report in preparation for its retirement in a future update.

Workday recommends that you use the Manage Program Completion report instead.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/sturec/7791726.html

cognizant

Student - Multiple Academic Periods for Saved Schedules

A

What's Changing

Workday now provides additional configuration options and context to students when they plan with and register for courses offered during nonstandard academic periods.

Additional Considerations

.When students create saved schedules after selecting course sections offered during a nonstandard academic period, Workday displays a new Academic Period prompt instead of the Academic Period field. Students can now configure their new saved schedule to have either the:

- Selected nonstandard period.
- Standard academic period that the nonstandard period rolls up to.

What Do I Need To Do?

Workday recommends that customers update their training materials or communications to inform students that they can now add course sections offered during nonstandard academic periods to a saved schedule configured with a standard academic period.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stureg/8001968.html

Student - New Report for Student Sponsor Contracts

A

What's Changing

Workday continues to enhance the Student Sponsor Contract functionality with an additional standard report.

Additional Considerations

Workday delivers a new Find Student Sponsor Payments standard report, secured to the Reports: Student Sponsor Payments domain.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stufin/7746037.html

Student - Performance Improvement for Generate Pending Student Refunds

A

What's Changing

Workday delivers a performance improvement for the Generate Pending Student Refunds task.

Additional Considerations

Workday delivers a new Reassess Charges and Hide the Ready to be Refunded Grid (for Optimal Performance) check box to the Generate Pending Student Refunds task. When selected, Workday will reassess student charges, if applicable, without loading the Ready to be Refunded grid. When the job completes, you can view the information about reassessed charges in My Tasks.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stufin/7735399.html

Student - Preliminary Transfer Credit Troubleshooting Console

A

What's Changing

Workday provides you with a self-service console to troubleshoot issues with granting preliminary transfer credits.

Additional Considerations

Workday delivers a new Preliminary Transfer Credit Troubleshooting Console report (secured to the Manage: Preliminary Transfer Credit domain) that you can use to examine potential and assigned preliminary transfer credits from external transcripts and education test results.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stuops/8025971.html

cognizant

Student - Privacy Preferences Reporting

A

What's Changing

Workday delivers a new business object and new report fields related to students' privacy preferences.

Additional Considerations

Workday delivers these new report fields on the new Privacy Preferences business object (secured to the Manage: Student Privacy domain):

- Academic Level and Academic Unit
- Athletic Team
- Birth City
- Birth Region
- Birth Country
- Class Standing
- Date of Birth
- Expected Graduation Date
- Included in Student Directory
- Institution
- Location
- Primary Institutional Address
- Primary Institutional Email Address
- Primary Institutional Phone Number
- Primary Program of Study
- Privacy Block

Workday also delivers a new Privacy Preferences report field on the Student business object (secured to the Manage: Student Privacy domain).

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stucore/8095891.html

cognizant

Student - Recalculate Student Sponsor Contracts by Institutional Academic Unit

A

What's Changing

Workday delivers improvements to the Student Nightly Job Orchestration.

Workday now enables you to limit the Recalculate Student Sponsor Contracts job in the Student Nightly Job Orchestration to the Institutional Academic Unit.

Additional Considerations

N/A

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stufin/7948383.html

Student - Registration Appointments for Multiple Institutions

A

What's Changing

Workday enhances the registration appointment functionality to now support multiple institutions partitioning.

Additional Considerations

To provide your institution with additional security, Workday updates the Registration Appointments report data source (secured to the Manage: Registration domain) to now only display the registration appointments from the institutions relevant to you.

Workday also removes that report data source from the Self-Service: Registration domain.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stureg/7652351.html

cognizant

Student - Reporting Enhancements

A

What's Changing

Workday delivers reporting enhancements to the Workday Student product.

Additional Considerations

Workday now enables you to create a custom report on the Student business object (data source of Students) with the related Direct PLUS Loan Authorization information, as well as a custom report on the Student Payments for Charges business object (data source of Student Payments for All Transaction Types) with the related Student PLUS Loan Application information.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stufin/7948303.html

Student - Review Application Page

A

What's Changing

Workday delivers a new conclusion page for admissions applications on external student sites that provides opportunities to review and edit applications and confirm successful submissions.

Additional Considerations

Workday adds a new Review Application button to the Application Overview page that takes applicants to the new Review Application page. From this page, applicants can submit the application or make additional edits.

The page displays:

- All of the information that the applicant entered on the previous pages, grouped into collapsible sections by page.
- The Terms and Conditions section.
- Error messages, if the applicant attempts to submit the application with errors or missing required fields.
- When the applicant successfully submits an application, Workday now displays a confirmation message.

What Do I Need To Do?

You don't need to do anything; this feature is automatically available. However, the Review Application page will display with the default page label and without a description. To change the page label and add a description to provide more context for the Review Application page, access the Edit Admissions Application Configuration task and update the Review Application section.

What Happens If I Do Nothing?

When applicants click Review Application, the Review Application page displays with the default page label and no page description.

Community Link https://doc.workday.com/release-notes/en-us/stups/7588037.html

Student - Role-Based Security for Transfer Credit

A

What's Changing

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

Workday updates these domains to support role-based security for transfer credit:

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

On these domains, Workday adds these allowed security groups, in addition to the existing allowed security group types:

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

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.

Workday also updates 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

Additional Considerations

N/A

What Do I Need To Do?

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

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stuops/7729494.html

Student - Security Domains for Transfer Credit

A

What's Changing

Workday reorganizes the security domain structure for some transfer credit domains and tasks for consistency.

Additional Considerations

Security Domains: For consistency with existing Workday domains, Workday renames the Manage: Transfer Credit Rules domain to Set Up: Transfer Credit Rules.

Workday updates these domains so they are no longer subdomains of the Manage: Student Transfer Credit domain:

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

Workday also delivers a conversion so that security policies on these domains are independent and no longer inherit from the Manage: Student Transfer Credit domain.

Tasks and Reports: Workday now secures these tasks and reports to the Set Up: Transfer Credit Rules domain instead of Manage: Student Transfer Credit:

- 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

Community Link https://doc.workday.com/release-notes/en-us/stuops/7522923.html

Student - Security Domains for Transfer Credit (cont.)

A

Additional Considerations

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

Web Services: Workday removes 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.

Workday secures 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. Workday recommends 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?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stuops/7522923.html

Student - Student Event History

A

What's Changing

Workday continues to improve Student Event History.

For additional details, see the 2023R2 Student Event History in the What's New in Workday report.

Additional Considerations

Workday adds all business processes to Student Event History.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stucore/7642800.html

Student – Student Payment Application Lock

A

What's Changing

Workday enables you to now apply or clear the student payment lock when running the Apply Student Payment task. This functionality no longer locks your payments automatically.

Additional Considerations

Workday adds the new Payment Application Lock check box to the:

- Apply Student Payment task.
- View Student Payment report.

This new check box enables you to now choose whether to lock or unlock a payment when you're manually applying the payment to charges.

On the Apply Student Payment task, Workday renames:

- The Customer field to Student.
- The Payment Application Locked check box to Payment Application Lock.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stufin/7733912.html

Student – Student Payment Precedence Charge Item Selection

A

What's Changing

Workday now enables you to select individual student charge items to include in your payment precedence group.

Additional Considerations

Payment Precedence Groups Task

On the Payment Application Precedence Groups Configuration grid of the Maintain Student Payment Precedence Groups task, Workday:

- Renames the Exclusion field to Charge Item Exclusion.
- Adds a new Charge Item Inclusion field.
- No longer requires an entry in the Charge Type field. You can now enter a Charge Type, a Charge Item Inclusion, or both.
- Now only enables you to select options in the Charge Item Exclusion field that match Charge Items of the selected Charge Type.
- Updates the precedence line logic to now only apply excluded items to that specific Charge Type row.

What Do I Need To Do?

Workday delivers this new and updated functionality automatically.

What Happens If I Do Nothing?

When you do nothing and add additional charge items, you'll need to maintain your payment precedence groups to continue to exclude them from payment precedence.

Community Link https://doc.workday.com/release-notes/en-us/stufin/7733919.html

Student – Student Payment Precedence Charge Item Selection (cont.)

A

Additional Considerations

Payment Precedence Web Services

On the Get Student Precedence Group Rule Set and Put Student Precedence Group Rule Set web services, Workday:

- Renames the Exclusion field to Charge Item Exclusion.
- Adds a new Charge Item Inclusion field.

On the Put Student Precedence Group Rule Set web service, Workday also:

- No longer requires an entry in the Charge Type field. You can now specify a Charge Type, a Charge Item Inclusion, or both.
- Now only enables you to specify options in the Charge Item Exclusion field that match Charge Items of the selected Charge Type.
- Now requires that you specify a Charge Item Inclusion or Charge Item Exclusion that matches this Institution.

Note: To use these updates, you must use the web service v43.0 or later.

Community Link

https://doc.workday.com/release-notes/en-us/stufin/7733919.html

Student – Student Transfer Credit Troubleshooting Console

A

What's Changing

Workday provides you with a self-service console to troubleshoot issues with granting transfer credits to students.

Additional Considerations

Workday delivers a new Student Transfer Credit Troubleshooting Console report (secured to the Manage: Student Transfer Credit domain) that you can use to examine potential and assigned transfer credits from external transcripts and education test results.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stuops/7428976.html

Student - View Saved Schedules for Student Registrations

A

What's Changing

Workday continues to enhance the student registration experience by delivering a redesigned home page for saved schedules.

Additional Considerations

View My Saved Schedules Report

For an improved student experience, Workday adds these new tabs to the View My Saved Schedules report:

Upcoming Saved Schedules

Past Saved Schedules

To support a combined view of all the saved schedules, Workday also:

- Adds a new Saved Schedules grid for each standard academic period.
- Removes the Start Date within prompt.

To reduce clutter on that report, Workday moves these buttons to the new Actions column:

Add Course Sections

Edit

Remove

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stureg/7433778.html

Student - View Saved Schedules for Student Registrations (cont.)

A

Additional Considerations

Workday also renames the Start Registration button to Register, and move it to the new Saved Schedules grid.

Workday also add these new columns to provide more context to students:

- Alerts
- Academic Period. This column only displays when there's a saved schedule configured with a nonstandard academic period.

View Saved Schedules for Student Report

Workday now enables you to access the View Saved Schedules for Student report from global search, making it easier to access and improving usability.

When you access this report from the global search, Workday now also displays a new Student prompt on the initiating page.

For clarity, Workday also adds a new Student field while you're viewing saved schedules.

Workday also removes the Start Date within prompt from that report, enabling you to view student saved schedules with fewer clicks.

Community Link https://doc.workday.com/release-notes/en-us/stureg/7433778.html

Talent

Talent 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.

Talent

- Autosave for Guided Experience Employee Reviews
- Calibration Performance Improvements
- Career Hub Explore and Career Path Builder Skills and Skill Interests Matching
- Employee Reviews Started Field on View Employee Review Template Report
- Feedback Received User Experience in Manager Insights Hub
- Feedback User Experience Responsive Design
- Flex Teams User Experience
- Goals User Experience Redesign for Mobile
- Organizational Goals Configuration
- Suggested Skills for Workers
- Employee Reviews Started Field on the View Employee Review Template Report

Talent - Autosave for Guided Experience Employee Reviews

A

What's Changing

With the 2024R2 release, Workday delivers Autosave for Guided Experience Employee Reviews for desktop users. Workday also replaces the Save for Later button for Guided Experience reviews, and automatically save your work every 90 seconds.

Automatically saves data in supported sections for Guided Experience employee reviews by preventing end users from losing work when a Workday session times out.

Additional Considerations

Workday replaces the Save for Later button with the new Save button to manually save your Guided Experience employee reviews. You can now continue to work on your review without having to reopen the saved event.

Autosave is only available within the Guided Experience employee review template for desktop users. The background process runs every 90 seconds for supported Guided Experience employee review sections. The autosave feature isn't available for these steps:

- Acknowledgment
- Review and Submit

The Career section isn't available for Guided Experience in employee review templates.

Autosave for Guided Experience Employee Reviews won't work for comments entered during the Acknowledgment and Review and Submit steps of the employee review business processes in use.

What Do I Need To Do?

Autosave for Guided Experience Employee Reviews is automatically available upon loading the employee review in Guided Experience on your desktop. There's no additional configuration required.

What Happens If I Do Nothing?

Autosave for Guided Experience Employee Reviews is automatically available. Your in-progress reviews within Guided Experience will move to use autosave as a replacement for save for later.

Community Link https://doc.workday.com/release-notes/en-us/hrperf/7092140.html

cognizant

Talent - Calibration Performance Improvements

A

What's Changing

With this release, Workday updates the All Workers filter on the Indexed In Progress Worker Calibration Placements report data source.

Additional Considerations

The performance improvements with this feature are back-end enhancements and not visible configuration in the UI.

What Do I Need To Do?

No steps need to be taken. This feature is automatically available.

What Happens If I Do Nothing?

No steps need to be taken. This feature is automatically available.

Community Link https://doc.workday.com/release-notes/en-us/talpip/8156439.html

Talent - Career Hub Explore and Career Path Builder Skills and Skill Interests Matching

A

What's Changing

With this release, Workday improves the skills and skill interests matching results in Career Hub Explore and the Career Path Builder. These improvements encourage greater interaction with Career Hub, and enable your workers to identify and pursue relevant career opportunities.

Additional Considerations

Workday improves the skills and skill interests matching results for suggested job profiles in the:

- Featured Next Move and Explore Other Moves sections in Career Hub Explore.
- Career Path Builder, when users select the Skills or Skill Interests source options.

Suggested skills in the side panel are sorted with job profile explicit skills first, followed by the machine learning suggested skills, in alphabetical order.

For skill and skill interest suggestions to appear in both Explore and the Career Path Builder, workers must have at least one skill on their worker profile.

What Do I Need To Do?

You might need to take additional steps to enable this feature depending on your organization's subscription service agreement.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/taladv/7854868.html#Impact-tab

Talent - Employee Reviews Started Field on View Employee Review Template Report

A

What's Changing

With this release, when viewing an employee review template using the View Employee Review Template report, Workday replaces the drill-down in the Employee Reviews Started field to display a count of the number of reviews that use the template. Reduces loading time for the View Employee Review Template report.

Additional Considerations

Reduces loading time for the View Employee Review Template report.

To view which templates have started, run the Employee Reviews report to view all In Progress or Completed reviews, or the Employee Review Summary to return a matrix report of started reviews by status in the business process. This is easily accessible from the related actions menu of your employee review template by navigating to the Talent category.

What Do I Need To Do?

No steps need to be taken. This feature is automatically available.

What Happens If I Do Nothing?

No steps need to be taken. This feature is automatically available.

Community Link https://doc.workday.com/release-notes/en-us/hrperf/7110908.html

Talent - Feedback Received User Experience in Manager Insights Hub

A

What's Changing

Workday 2024R2 enhances the manager feedback received experience in Manager Insights Hub. Workday provides a new user interface to view requested feedback and anytime given feedback by enabling the card format. Workday improves the look and navigation of feedback received.

What Do I Need To Do?

Feedback will display in the card format automatically and doesn't require uptake.

Additional Considerations

Note: Please refer to the community link for extensive list of additional considerations

What Happens If I Do Nothing?

Feedback will display in the card format automatically and doesn't require uptake.

Community Link https://doc.workday.com/release-notes/en-us/talpip/8052658.html

Talent - Feedback User Experience Responsive Design

A

What's Changing

With the 2024R2 release, Workday enhances the visual appeal of the feedback user experience with a dynamic presentation.

Additional Considerations

Workday maximizes the space on the page and minimize content gaps on these feedback tasks:

- Give Feedback
- Get Feedback on Self
- Get Feedback on Worker
- Maintain Feedback Setup

What Do I Need To Do?

No steps need to be taken. This feature is automatically available.

What Happens If I Do Nothing?

No Impact

Community Link https://doc.workday.com/release-notes/en-us/talpip/8154089.html

Talent - Flex Teams User Experience

A

What's Changing

With this release, Workday modifies the Flex Teams report and the flex team member feedback user experiences. These improvements are expected to make the host or team lead experience more seamless, making it quicker to staff their flex teams.

Additional Considerations

Workday updates the Flex Teams report by:

- Displaying the flex teams as cards.
- Highlighting specific calls to action for flex team hosts.
- Surfacing insights on cards for workers who have expressed interest.

Additionally, Workday updates multiple labels, simplifying the language. We replace:

- Create Flex Team with Create.
- Manage Flex Team with Manage Team.
- Share Flex Team with Share Link.
- View Flex Team with View Details.
- Edit Flex Team with Edit.
- Cancel Flex Team with Cancel.

For administrators and hosts providing feedback to workers, Workday adds a select worker option, allowing you to focus on the applicable worker to more easily review and provide feedback.

What Do I Need To Do?

You might need to take additional steps to enable this feature depending on your organization's subscription service agreement.

What Happens If I Do Nothing?

These changes are automatically available and will appear for users even if you do nothing.

Community Link https://doc.workday.com/release-notes/en-us/gigs/7728953.html

Talent - Goals User Experience Redesign for Mobile

A

What's Changing

With the 2024R2 release, Workday continues to enhance the Goals User Experience Redesign feature by enabling the card framework for mobile. These changes only apply if you've opted in to the Goals User Experience Redesign Changes feature on the Maintain Feature Opt-Ins task.

Additional Considerations

Workday provides mobile users access to the card framework through the Goals report in the Configure Profile Group task for the Performance for Worker Profile profile group. You no longer need to configure the View Goals report for mobile users in the Performance for Worker Profile profile group.

If customers opt-in to the Goals User Interface Redesign feature, the View Goals report that displays on the Configure Profile Group task for the Performance for Worker Profile group will no longer be applicable. If it remains, you'll receive an error message upon saving. Remove this report from this view and save your changes. The Goals report already represented in this profile group will provide the necessary information in both mobile and desktop views.

What Do I Need To Do?

Opt in to the Goals User Experience Redesign Changes feature in the Maintain Feature Opt-Ins task. For more information, see the 23R2 What's New Post: Goals User Experience Redesign link in the Related Links section.

If opted in to the Goals User Experience Redesign feature, no steps need to be taken. This feature is automatically available. Users with security access will automatically see the new card framework on their mobile devices.

What Happens If I Do Nothing?

If opted in to the Goals User Experience Redesign feature, mobile and desktop users with the security to do so, can access the My Goals and View Goals for Worker reports.

Community Link https://doc.workday.com/release-notes/en-us/hrperf/8102856.html

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Talent - Organizational Goals Configuration

A

What's Changing

With the 2024R2 release, Workday allows to configure whether you want to display or hide your organizational goal descriptions using the Maintain Goal Setup task.

Additional Considerations

Workday delivers the Show Organizational Goal Description Field check box in the Maintain Goal Setup task.

What Do I Need To Do?

You can display or hide the organizational goal description field in your tenant using the Maintain Goal Setup task.

- To display the organization goal description in your tenant, select the Show Organization Goal Description Field check box in the Configure Organization Goals section.
- To hide the organization goal description in your tenant, ensure that the Show Organization Goal Description Field check box is unchecked in the Configure Organization Goals section.

What Happens If I Do Nothing?

Workday displays the description for the organization goal.

Community Link https://doc.workday.com/release-notes/en-us/hrperf/8097589.html

Talent - Suggested Skills for Workers

A

What's Changing

With the 2024R2 release, Workday improves its methodology for generating skill suggestions to workers by leveraging explicit skill data to supplement existing machine learning-generated skill suggestions.

Additional Considerations

Workday increases the relevance of suggested skills when workers edit skills in their profiles by now suggesting explicit skills from these sources, in this order, for each worker:

- Current Job Profile
- Completed Projects
- Previous Job Profiles
- Completed Flex Team Roles

After workers add all the explicit skills from these sources, Skills Cloud resumes its normal methodology of using machine learning to suggest additional implicit skills. Skills Cloud always displays 10 skill suggestions.

To accommodate anticipated customer questions around testing the validity of this update please refer them to modify a worker's profile skills data with explicit skills and compare those suggested skills that return from the updated sources in this release against their sandbox and production environments.

What Do I Need To Do?

To enable skill suggestions, you must:

- Enable Skills Cloud.
- Select the Populate Suggested Skills For Workers check box on the Maintain Skills and Experience Setup task.

What Happens If I Do Nothing?

If you do nothing, workers will now see more relevant skill suggestions when they edit their skills in their worker profiles.

This change does not impact:

- Career Hub skill suggestions.
- Existing report fields for skills.

Community Link https://doc.workday.com/release-notes/en-us/skills/8108412.html

Talent - Employee Reviews Started Field on the View Employee Review Template Report

A

What's Changing

With this release, when viewing an employee review template using the View Employee Review Template report, Workday replaces the drill-down in the Employee Reviews Started field to display a count of the number of reviews that use the template.

What Do I Need To Do?

No steps need to be taken. This feature is automatically available.

Additional Considerations

Workday updates the View Employee Review Template report by replacing the drill-down in the Employee Reviews Started field with a count of the number of reviews that use the template.

What Happens If I Do Nothing?

No steps need to be taken. This feature is automatically available.

Community Link https://doc.workday.com/release-notes/en-us/hrperf/7110908.html

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UK Payroll

UK Payroll 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.

UK Payroll

- Smart UK RTI FPS
- UK Pension Auto-Enrolment Notification Exclusion
- UK Pension Auto-Enrolment Web Services
- UK Pensions Auto Re-enrolment

UK Payroll - Smart UK RTI FPS

A

What's Changing

Workday enhances the RTI FPS process to enable you to rerun the process and only update items that have changed.

Additional Considerations

Workday updates the Generate UK RTI FPS Data task to include an Enable Smart RTI check box.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/paywdgbr/7506170.html

UK Payroll - UK Pension Auto-Enrolment Notification Exclusion

A

What's Changing

Workday updates the Send UK Pensions Auto Enrolment Notifications task to enable you to exclude specific workers.

Additional Considerations

Workday adds an Exclude Workers check box below the existing Workers selection field. If you select the check box, Workday doesn't distribute a notification for any workers you choose.

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/paywdgbr/7980316.html

UK Payroll - UK Pension Auto-Enrolment Web Services

A

What's Changing

Workday enhances the pension auto-enrolment web services to include workers' re-enrolment details.

Additional Considerations

Workday updates these web services (secured to the existing Worker Data: Payroll (Company Specific) - UK domain):

- Get Worker Pensions Auto Enrolment Details
- Put Worker Pensions Auto Enrolment Details

To add this worker data:

- Re-Enrolment Date
- Re-Enrolment Selection Type

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/paywdgbr/7767624.html

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UK Payroll - UK Pensions Auto Re-enrolment

A

What's Changing

Workday enhances how you record and process workers' re-enrolment into a qualifying pension scheme by enabling you to automate parts of the re-enrolment process.

Additional Considerations

Workday delivers a new Maintain Company UK Pensions Re-Enrolment Details task (secured to the existing Set Up: Payroll (Pensions) - UK domain), enabling you to record current and future pension re-enrolment dates. As part of this, we update the existing Add Company UK Pensions Auto Enrolment Details task by removing the Re-Enrolment Date field. The field is now shown on the Maintain Company UK Pensions Re-Enrolment Details task; Workday automatically copies over any of your existing dates.

Workday also delivers this new task and report (secured to the existing Worker Data: Payroll (Company Specific) - UK domain), enabling you to re-enrol selected workers from a pay group into a qualifying pension scheme and view the results:

- Add UK Pensions Re-Enrolment Details
- View UK Pensions Re-Enrolment Details

What Do I Need To Do?

This feature is automatically available. Use these new tasks for re-enrolment:

- Maintain Company UK Pensions Re-Enrolment Details
- Add UK Pensions Re-Enrolment Details
- View UK Pensions Re-Enrolment Details

Workday recommends you update your training materials to make users aware of the changes.

Community Link https://doc.workday.com/release-notes/en-us/paywdgbr/7989613.html

UK Payroll - UK Pensions Auto Re-enrolment (cont.)

A

Additional Considerations

Workday updates the Add Worker UK Pensions Auto Enrolment Details task and View Worker UK Pensions Auto Enrolment Details report, by adding these columns to the Pension Auto Enrolment Details tab:

- Re-Enrolment Date - Displays the dates recorded in the Maintain Company UK Pensions Re-Enrolment Details task.
- Re-Enrolment Selection Type - Identifies if the worker has been either manually or automatically included in, or excluded from, re-enrolment.

What Happens If I Do Nothing?

You'll see the new re-enrolment tasks in the UI.

Workday moves the existing Re-Enrolment Date field from the Add Company UK Pensions Auto Enrolment Details task to the new Maintain Company UK Pensions Re-Enrolment Details task.

Pensions auto-enrolment assessment will continue to work as is.

Community Link https://doc.workday.com/release-notes/en-us/paywdgbr/7989613.html

USA Payroll

USA Payroll 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.

USA Payroll

- Get Quarterly Worker Tax Filing Data Web Service

USA Payroll - Get Quarterly Worker Tax Filing Data Web Service

A

What's Changing

Workday continues to enhance the Get Quarterly Worker Tax Filing Data web service.

Additional Considerations

Effective 2025-01-01, Workday updates the Get Quarterly Worker Tax Filing Data web service, enabling you to report hours worked in Oregon for the Oregon Workers Benefit Fund tax.

What Do I Need To Do?

If you don't want to report hours for the Oregon Workers Benefit Fund, you can set the Exclude_Other_Data_Element field to False.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/paywdgbr/7767624.html

Workforce Management

Workforce Management 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.

Workforce Management

- Absence Reporting on Time Off Entry and Time Off Event Business Objects

Not Applicable

Workforce Management - Absence Reporting on Time Off Entry and Time Off Event Business Objects

A

What's Changing

With this release, Workday delivers new report fields for absence reporting on the Time Off Entry and Time Off Event business objects that you can use in custom reports.

Additional Considerations

Workday delivers these new report fields on the Time Off Entry business object (secured to the Public Reporting Items domain):

- Absence Threshold Status Indicator for Pending Time Off. This report field enables you to identify the threshold status of a time off entry for a pending time off event. The value depends on whether the absence threshold is met and which severity level you configure for the validation:

  Error: The absence threshold is met and the validation severity is critical.

  Valid: The absence threshold isn't met.

  Warning: The absence threshold is met and the validation severity is warning.

What Do I Need To Do?

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

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/abs/7986003.html

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Workforce Management - Absence Reporting on Time Off Entry and Time Off Event Business Objects (cont.)

A

Additional Considerations

The value is blank for events that have an event status other than In Progress or when no absence thresholds apply.

- Corrected Time Off Quantity. This report field enables you to identify the time off units that the worker corrected in the time off event.
- Previously Requested Time Off Quantity. This report field enables you to identify the time off units that the worker previously requested in the time off event before it was corrected.

Workday also delivers a new Absence Threshold Result report field on the Time Off Event business object (secured to the Public Reporting Items domain). This report field returns the Absence Threshold Result business object for a time off event, enabling you to access the report fields on the business object.

What Do I Need To Do?

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

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/abs/7986003.html

Thank you