Top Features Manual

Workday 2024 Release 2

Release Preparation Window: August 17 – September 20, 2024

Production Release: September 21, 2024

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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

Cognizant Consultants and Product Leads have prepared a list of top features for the upcoming 2024R2 Workday release. Some features will be automatically available, and others will require some set up. They have noted which category is applicable to each feature.

Assess Impact

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

Retired Functionality Reference

These include items beginning their retirement for the first time, items whose retirements have changed, and items that are fully retiring as of Workday 2023R2.

WD2024 R2 Top Features

Adaptive Planning

- Write Back from OfficeConnect to Adaptive Planning - [A]
- Long-Running Processes in the Planning Center - [A]
- Replace Mode by Level for Model Sheet Import in Planning Data Loaders - [S]
- Import Ending Balance data for Balance Sheet from Workday Financials with High Volume Extract - [A]
- Archived Versions for Data Freeze - [A]
- Changes to User Interface - [A]

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- Schedule Live Composite Reports - [A]
- Composite Report User Interface - [A]
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Analytics & Reporting

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- KPI Viz Display - [A]
- Median and Percentile Summarizations in Discovery Boards - [A]
- Support Additional Languages on Discovery Boards - [A]
- Viz Options for KPI - [A]
- Reference Lines in Discovery Boards - [A]
- Data Labels for Matrix Charts in Discovery Boards - [A]
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[A] - Automatically Available Features
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WD2024 R2 Top Features

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Core HCM

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Legend:
[A] - Automatically Available Features
[S] - Setup Based Features

WD2024 R2 Top Features

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Legend:
[A] - Automatically Available Features
[S] - Setup Based Features

WD2024 R2 Top Features

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Student

Student Core

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Legend:
[A] - Automatically Available Features
[S] - Setup Based Features

WD2024 R2 Top Features

Student

Student Financials

- Aging Receivable Reports with Custom Aging Groups - [A]
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- Student Payment Application Lock - [A]
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Student

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Legend:
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WD2024 R2 Top Features

Workforce Management

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- Bulk Prorate Accruals - [S]
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Legend:
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Retired Functionality Reference

Adaptive Planning

- Reclassification rules
- Live reports on announcements
- Erase Data Functionality

Analytics and Reporting

- Academic Progress and Financial Aid Policy Rule

Benefits

- Benefits Worklet on Mobile

Compensation

- MBT Only: Calculated Plan Assignment Updates (DO NOT USE)
- Compensation Plan Assignment Snapshot Fields
- Compensation Review Participation Rule Framework and Report
- Snapshot of Salary Period Plan Assignment Fields

Core HCM

- Assign Roles and Organization Roles Task
- Personal Information
- Other IDs (Do Not Use)
- The Locations (Do Not Use) report data source
- Assign Roles to Worker Initiating Action
- Active Organizations and Subordinates Report Field

Financial Management

- Satisfactory Academic Progress Rule
- Purchase Order Line Date Report Field
- Expenses Worklet
- Find Customer Invoices Report Field
- Direct Ownership Only Check Box on the Non-Controlling Interest Tab
- Cash Balance Check Event
- Investment in Subsidiary/Subsidiary Equity
- Receivables Aging Report
- Average Daily Balance Date Report Field
- Maintain Payment Elections (Do Not Use)
- Student Financial Services Reaction Rule Set

Retired Functionality Reference

Integration

- Kronos Worker Data Import

Payroll

- Maintain Earnings Update ROE Reporting Codes
- Local Payroll Data
- Build Objects for Payroll Interface 2.0
- Allocate Pay Input Across Employment

Platform and Product Extensions

- Favorites Worklet
- The Translations Worklet
- Workflow Definition (Do Not Use)

Student

- 1042-S Charge Item Classification Report Field
- Transfer Grade Report Field
- Academic Period Record Report Field
- Class Standing Definition (Do Not Use) Report Field on Student Object

Talent

- Talent Review Documents and Talent Workers Report Data Sources
- My Application and My Job Applications Reports

Workforce Management

- Enter Time (Weekly Grid)
- Create Project Worksheet Task
- Web services of Accrual, Time Off and Leave
- Time Off Taken in Date Range RDS
- Revise Correct Time Off and Revise Time Off tasks

Adaptive Planning

Adaptive Planning Top Features

Cognizant Consultants and Product Leads have prepared the list of top features for this Workday release.

Adaptive Planning

- Write Back from OfficeConnect to Adaptive Planning - [A]
- Long-Running Processes in the Planning Center - [A]
- Replace Mode by Level for Model Sheet Import in Planning Data Loaders - [S]
- Import Ending Balance data for Balance Sheet from Workday Financials with High Volume Extract - [A]
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- Changes to User Interface - [A]

Legend:
[A] - Automatically Available Features
[S] - Setup Based Features

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.

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

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

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.

Additional Considerations

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 don't enable you to stop a process, Workday displays uncancellable in the Action column.

What Do I Need To Do?

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

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/plnfed/8008018.html

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Adaptive Planning - Long-Running Processes in the Planning Center (cont.)

A

Additional Considerations

Long-Running Processes include these processes 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.

Workday only displays:

• Processes that have been running for over 30 seconds.

• The username of the person running the process.

Workday don't display:

• Processes after you canceled them.

• The related sheet, report, version, or model component.

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

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Adaptive Planning - Replace Mode by Level for Model Sheet Import in Planning Data Loaders

S

What's Changing

Workday now enables you to replace data by level when you import into modeled sheets using planning data loaders. This mode will only replace data for levels detected in the imported payload.

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 Replace all for imported levels mode.

What Do I Need To Do?

Update data loader for modeled sheet with the Import Option: Replace existing data in sheet, but only for imported levels.

What Happens If I Do Nothing?

The planning data loader for the modeled sheet will continue to run as originally designed.

Community Link https://doc.workday.com/release-notes/en-us/plnint/7986971.html

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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.

Additional Considerations

Workday provides a new "Ending Balance" amount type. Workday also provides journal lines filtering by Balance Sheet Ledger Accounts and Summaries.

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

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.

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/plnmod/7846641.html

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

A

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, Workday enables 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.
- 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/plnmod/7846641.html

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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 Retiring Functionalities

These include items beginning their retirement for the first time, items whose retirements have changed, and items that are fully retiring as of Workday 2024R2.

Adaptive Planning

- Reclassification rules
- Live reports on announcements
- Erase Data Functionality

Adaptive Planning - Reclassification rules

What's Changing

Workday plans to retire reclassification rules and now delivers journal entries.

Additional Considerations

N/A

What Do I Need To Do?

Workday recommends that you use the new journal entries.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/plnmod/6898577.html

Adaptive Planning - Live reports on announcements

What's Changing

Workday plans to retire live reports on announcements and now delivers web links on dashboards.

Additional Considerations

N/A

What Do I Need To Do?

Workday recommends that you use web links on dashboards.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/plnrpt/6628667.html

Adaptive Planning - Erase Data Functionality

What's Changing

Workday now plans to retire the erase data functionality in loaders. Workday replaces the retiring item with "A new erase component in a future update."

Additional Considerations

N/A

What Do I Need To Do?

This may impact your training materials.

What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/plnint/6857424.html

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Analytics and Reporting

Analytics and Reporting Top Features

Cognizant Consultants and Product Leads have prepared the list of top features for this Workday release.

Analytics and Reporting

- Freeze Report Columns - [A]
- Bulk Duplicate Composite Columns and Rows - [A]
- Schedule Live Composite Reports - [A]
- Composite Report User Interface - [A]
- Worksheets Public and Private Filters - [A]
- Worksheets Expanded Sharing Options for Security - [A]
- Worksheets Global Prompts for Live Data - [A]
- Worksheets GenAI Formula Writer and Explainer - [S]
- People Analytics Hiring V2 - [S]
- Configurable Population Views in People Analytics - [S]
- Measure Formats for Discovery Boards - [A]
- KPI Viz Display - [A]
- Median and Percentile Summarizations in Discovery Boards - [A]
- Support Additional Languages on Discovery Boards - [A]
- Viz Options for KPI - [A]
- Reference Lines in Discovery Boards - [A]
- Data Labels for Matrix Charts in Discovery Boards - [A]
- Increased Limits for the Reporting Data Model - [S]

Legend:
[A] - Automatically Available Features
[S] - Setup Based Features

Analytics & 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. This feature gives end users more control over how tabular report data displays. It also makes it easier to understand the context of data on reports that have many columns and require horizontal scrolling. With this release, Workday removes the Freeze Control Field check box from the View Options section on the Advanced tab for composite reports. This ensures end users have full control over which columns they freeze on reports.

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 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

Analytics & 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. This feature reduces the amount of time and effort to create a composite report by enabling you to mass duplicate columns and rows. Workday added the Duplicate button to the Rows and Columns tabs of the composite report. When duplicate columns or rows needed, user can select their location in relation to another column or row on the report: First (Top); Before; After; Last (Bottom).

Additional Considerations

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

Analytics & Reporting- Schedule Live Composite Reports

A

What's Changing

With the 2024R2 release, 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. This feature enables you to interact with report results directly in your browser instead of generating a CSV, Excel, or PDF output. Keeping the report results in Workday also makes your data more secure.

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 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 & 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. This feature reduces the amount of time and effort required to configure cells and makes it easier to maintain them. Workday delivered 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.

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 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

Analytics and Reporting - Worksheets Public and Private Filters

A

What's Changing

With the 2024R2 release, 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.

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

Additional Considerations

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.

Worksheets dramatically improves the collaborative functionality of workbooks by implementing private filters. Individual users can customize their own filter criteria to complete their work, without affecting other users' workflows.

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.

What Happens If I Do Nothing?

Filters that you created prior to the new feature release will continue to work, as public filters, after the new feature is available. Access your existing filters using the Filter > Public Filter menu option.

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

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.

What Do I Need To Do?

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

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

What Happens If I Do Nothing?

Existing shared workbooks continue to have the permissions that were assigned before the feature was released. When you view the sharing permissions, you can adjust the settings using the new options.

Community Link https://doc.workday.com/release-notes/en-us/uxbi/7718849.html

Analytics and Reporting - Worksheets Expanded Sharing Options for Security

A

Additional Considerations

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 Happens If I Do Nothing?

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.

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.

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

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?

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 GenAI Formula Writer and Explainer

S

What's Changing

The Worksheets GenAI Formula Writer automatically creates workbook formulas based on your description of what you want the formula to do. You can insert the resulting formula into the workbook, or you can use the generated formula as a guide and make edits to it. You can also see an explanation of how a formula works by selecting a cell containing a formula, right-clicking the cell, and selecting Explain Formula.

These features allow you to analyze Workday data more quickly and efficiently by generating formulas and explaining how formulas work.

What Do I Need To Do?

To use The Formula Writer

1. Click the cell where you want to insert the generated formula. You can't place a generated formula into a Live Data area.
2. Click the Formula Writer sparkle icon in the toolbar to open the Formula Writer.
3. Type instructions for the formula you want into the Formula Description field.
4. Click Generate. Worksheets generates a formula and displays it in the Result area. An explanation of the formula displays below the results.
5. If your formula description isn't detailed enough to generate a formula, a message displays asking you to change the description. Review the formula and edit it as needed. Generated formulas often don't include correct cell references and might have other issues. The process of generating formulas is iterative, and relies on you to assess the output and edit the formula as needed.
6. Click Insert into <Cell> to place the formula into the selected cell and automatically run it.

Community Link https://doc.workday.com/release-notes/en-us/uxbi/8141730.html

Analytics and Reporting - Worksheets GenAI Formula Writer and Explainer (cont.)

S

What's Changing

The Formula Writer provides a starting point to help you generate formulas and analyze the data for your needs. The Explain Formula feature helps you learn new formulas by explaining how formulas work to get the results.

Additional Considerations

A new Formula Writer sparkle icon in the toolbar menu enables you to open the Formula Writer panel so you can describe a formula that you want to generate.

A new right-click option from a workbook cell enables you to see an explanation of the formula in the cell.

What Do I Need To Do?

To enable the Formula Writer

1. On the Innovation Services Opt-in task, select Productivity Suite ML Features on the Available Services tab in the Cross Application Services category.
   Security: Manage: Innovation Services domain in the Innovation Services functional area.
2. On the Edit Tenant Setup - System task, in the Workday Conversation Settings section, select the Enable Worksheets GenAI Features option.

What Happens if I do Nothing?

The Formula Writer sparkle icon, Formula Writer panel, and right-click options for Formula Writer and Explain Formula don't display, and Worksheets behavior remains unchanged.

Community Link https://doc.workday.com/release-notes/en-us/uxbi/8141730.html

Analytics and Reporting - People Analytics Hiring V2

S

What's Changing

With 2024R2 release, Workday introduces a new version of the Hiring Pipeline, with additional fields, that expands the capabilities of Workday's analysis of your hiring data, and enables Workday to provide you more precise and relevant hiring-related insights. Workday migrates fields from your previous configuration that don't require action to the new pipeline configuration.

To use the new Hiring version and its new fields, you need to reinstall People Analytics using the Configure People Analytics task.

What Do I Need To Do?

You have 90 days to migrate over. You are unable to run the installation until you migrate to the new Hiring.

Note: If you don't uptake Hiring V2, you won't be able to use any of the new languages: French (Canada), Korean and Japanese, within Hiring.

To migrate fields and set up new Hiring:

1. Run the Configure People Analytics task. Take note of the toast message after you run the task.
2. To access the Hiring pipeline: Click the Hiring Pipeline link on the toast message; or scroll down and click Edit on the Hiring Pipeline card.
3. Select the Hiring Metrics, and click Next.
4. Select the Include Target Fields check box to confirm your field mapping (see next page for more details).
5. Review the field mapping, and click Next.
6. Verify the remaining Hiring pipeline configuration.
7. Review all changes and click Finish to save.
8. Click Run Installation.

Community Link https://doc.workday.com/release-notes/en-us/stories/8120915.html

Analytics and Reporting - People Analytics Hiring V2 (cont.)

S

What's Changing

Workday now adds these new fields, under these categories:

- Recruiting Process: Decline Reason
- Candidate Information: Candidate Name; Candidate Date of Birth
- Candidate Processing: Offer Accepted Date
- Source of Candidates: Is Referral
- Job Requisition Information: Report Effective Date; Staffing Model; Job Requisition Close Date; Job Requisition Target Hire Date; Total Number of Openings; Number of Openings Available; Number of Openings Filled; Requisition Average Time to Fill; Linked Evergreen Requisition; Is Evergreen; EEO Job Classification
- Staffing Additions Information: Staffing Candidate ID; Staffing Job Requisition; Staffing Event; Staffing Date Initiated; Staffing Hire Date

Additional Considerations

Workday advises you to follow the migration process detailed in the release notes. It's important you review all fields and configuration for the new version.

What Do I Need To Do?

For step #4:

1. Remaining Configuration has new fields or fields that could not be migrated over from previous configuration. To map them ensure you: (a) Review each field to opt in or out of the field; (b) Opt in to all required fields to proceed to the next step. Each row will detail the previous configuration.
2. Migrated Configuration has all the fields that were successfully migrated. Ensure you: (a) Review each row to ensure that those fields are still necessary to pull into the hiring pipeline for analysis.

What Happens if I do Nothing?

The Formula Writer sparkle icon, Formula Writer panel, and right-click options for Formula Writer and Explain Formula don't display, and Worksheets behavior remains unchanged.

Community Link https://doc.workday.com/release-notes/en-us/stories/8120915.html

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Analytics and Reporting - Configurable Population Views in People Analytics

S

What's Changing

With 2024R2 release, Workday introduces a new feature in Configure People Analytics to define your meaningful worker populations in People Analytics helping you find and act on insights specific to those populations.

You can now define meaningful worker populations using the fields Worker Type or Worker Classification. Once configured, population views enable you to view insights generated specifically for a selected population.

What Do I Need To Do?

To configure population views in your People Analytics report:

1. Access the Configure People Analytics report.
2. Click the Worker pipeline.
3. In the Field Mapping step, select the fields that you selected as population views in the Application Settings card.
4. If you only selected Worker Type, make sure that the Worker Type field is checked in the Worker pipeline. If you selected both Worker Type and Worker Classification, make sure that both these fields are checked.
5. In the Worker Type and Worker Classification fields, map in the field you want to use to configure your population views.
6. You can either use the default fields Worker Type (mapped into the Worker Type field) and Pay Rate Type (mapped into the Worker Classification field) or map in any other fields.
7. Return to the Configure People Analytics report
8. Access the Application Settings card and visit the Population Views section.
9. Decide if you want to use 1 or 2 population views in the People Analytics report.

Community Link https://doc.workday.com/release-notes/en-us/stories/7074770.html

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Analytics and Reporting - Configurable Population Views in People Analytics (cont.)

S

Additional Considerations

Workday recommends mapping in calculated fields to configure your population view values in the People Analytics report. Calculated fields should be used if you don't have an already available field to use to define your meaningful populations. For example, you may want to view your retail and corporate workers separately. If no field already exists to break down these populations, create a calculated field and map it in to your population view field. Also, use calculated fields to combine populations that you want to view together. For example, you may have multiple existing values under the Worker Type field such as student, interns, seasonal workers that you want to combine together under a Temporary worker value.

Population views only support up to 6 unique values in a field. When configuring population views, select the values you'd like to use.
The Hiring pipeline doesn't yet support population views. The Hiring tab and Hiring KPIs in the People Analytics report can't be filtered by population views at this time. When you select a population view in the People Analytics report, all insights are generated for that population only.

What Do I Need To Do?

10. If you only want to use 1, select either Worker Type or Worker Classification in the Population View 1 field. These are placeholder fields so there is no impact if you select either Worker Type or Worker Classification at this step. If you want to use 2, select Worker Type and Worker Classification in the Population View 1 and Population View 2 fields.
11. Select up to 6 values for each population view.

What Happens If I Do Nothing?

If you do nothing, People Analytics will continue to work as configured. You can configure population views at any time.

Community Link https://doc.workday.com/release-notes/en-us/stories/7074770.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

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 - 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

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

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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

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 - Increased Limits for the Reporting Data Model

S

What's Changing

For OfficeConnect for Financial Management, Workday now increase the limits for available dimensions and hierarchies in the reporting model.

Additional Considerations

You can configure additional dimensions and hierarchies in the reporting model. When end users drill on the data in OfficeConnect, they can view additional details.

If you reached the previous limits of:

- 10 alternate hierarchies, then you can now add up to 10 more alternate hierarchies.
- 15 optional dimensions, then you can now add up to 10 more optional dimensions.
- 20 Show Details fields, then you can now add up to 10 more fields per version type.

What Do I Need To Do?

Run the Set Up Reporting Model task to configure the extra dimensions and hierarchies.

What Happens If I Do Nothing?

You'll see no changes in Workday if you don't run the Set Up Reporting Model task. The additional dimensions and hierarchies won't be available in the reporting model.

Community Link https://doc.workday.com/release-notes/en-us/anafin/7927732.html

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Analytics and Reporting Retiring Functionalities

These include items beginning their retirement for the first time, items whose retirements have changed, and items that are fully retiring as of Workday 2024R2.

Analytics and Reporting

- Academic Progress and Financial Aid Policy Rule

Analytics and Reporting - Academic Progress and Financial Aid Policy Rule

What's Changing

Workday now plans to retire these advanced reports:

- Find Satisfactory Academic Progress Policy Rule Sets by Program of Study
- Find Financial Aid Policy Rule Sets by Program of Study

Additional Considerations

Workday replaces the retiring item with the Academic Policy Viewer report.

What Do I Need To Do?

Verify that you have the Set Up: Academic Policies domain configured and start using the Academic Unit Policy Viewer report.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/stufad/5807517.html

Benefits

Benefits Top Features

Cognizant Consultants and Product Leads have prepared the list of top features for this Workday release.

Benefits

- Benefit Credit Offsets for Unused Plan Credits - [S]
- Cloud Connect for Benefits: Benefits Connector V2 - [S]
- Open Enrollment Journey Enhancements - [S]
- Worker Wellbeing Profile and Program Cards - [S]
- Benefit Elections User Experience Redesign - [A]

Legend:
[A] - Automatically Available Features
[S] - Setup Based Features

Benefits - Benefit Credit Offsets for Unused Plan Credits

What's Changing

Workday enables you to set up offsets from unused plan credits, which lets employees use leftover plan credits to reduce costs associated with their benefit elections during an enrollment event.
Administrators can easily specify how unused plan credits offset plan costs. Workers can easily see how these unused credits offset the costs of their benefits.

Additional Considerations

You can now specify how to apply unused benefit plan credits to health care, insurance, and additional benefits. Workers can now see how these unused plan credits are applied in the Current Benefit Elections and Costs report available on the Workday desktop app only.

Workday delivers a new grid, called Source Coverage Type for Unused Plan Credits, on the Benefit Credits tab of the Edit Benefit Group task. You can select coverage types from which you can apply unused credits.

What Do I Need To Do?

1. Access the Edit Benefit Group task. On the Benefit Credits tab, select the Enable Remaining Benefit Credits check box.
2. Configure the benefit coverage types from which unused plan credits can be sourced in the Source Coverage Type for Unused Plan Credits grid.
3. Configure the benefit coverage types in the order in which they're eligible for the unused plan credits to be applied in the Offset Deductions with Benefit Credits grid.

What Happens If I Do Nothing?

Workers won't be able to use unused plan credits to offset the cost of their benefit elections during an enrollment event.

Community Link https://doc.workday.com/release-notes/en-us/hrbenenroll/8072666.html

Benefits - Benefit Credit Offsets for Unused Plan Credits (cont.)

S

Additional Considerations

You can then select which coverage types to apply the offsets to in the Offset Deductions with Benefit Credits grid. You can specify whether unused plan credits can offset plan costs for health care, insurance, or additional benefits plans. Workday applies offsets from benefit plan credits before benefit group credits.

Workday enhances these report fields on the Enrollment Event business object so that you can report on unused credit offsets:

- Remaining Credits per Group Frequency: The remaining amount of the credit, after applying it in the enrollment event, adjusted by the frequency of the benefit group.
- Benefit Group Credit per Benefit Group Frequency: The amount by which a benefit group credit reduces the benefit plan cost, adjusted by the frequency of the benefit group.

Workday adds the new column, Net Cost, to the Current Benefit Elections and Costs report on the worker profile.

If you configure the Unused Plan Credits grid with a retroactive effective date, the changes apply to future dates as well.

Community Link

https://doc.workday.com/release-notes/en-us/hrbenenroll/8072666.html

Benefits - Cloud Connector for Benefits: Benefits Connector V2

S

What's Changing

Workday delivers Benefits Connector V2, a generic Cloud Connect for Benefits (CCB) outbound integration.

Workday can use this new version of the connector whenever an industry standard or proprietary template for a benefits provider isn't included in the CCB template catalog.

It delivers, Improved performance, more precision for data extraction, more benefits coverage types and additional benefits data.

Additional Considerations

Workday delivers a new version the CCB Benefits Connector, which generates an output file that contains worker's benefit enrollment, benefit eligibility, and demographic data. The CCB Benefits Connector V2 has separate data sections for each benefit plan type and related data. Each section has field level attributes that Workday uses to choose the fields Workday wants to report.

Workday delivers these new data sections: (1) Plan Eligibility - supports all coverage types; (2) Extensible fields - outputs a new Additional Information data section for data that you extract using extensible field overrides.

Workday includes the Health Savings Account and Additional Benefits coverage types as well 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/inthrben/8071727.html

Benefits - Open Enrollment Journey Enhancements

S

What's Changing

Workday adds the task Employee Benefits Open Enrollment Selection as a task you can enable as a step in Open Enrollment Journeys. As your employees complete your configured Open Enrollment Journey, they'll now be able to access this task as a part of that Journey.

Additional Considerations

Journeys is a separate product (SKU) that requires a separate license.

Your employee recipients must have access to Workday Journeys to use this feature.

What Do I Need To Do?

As you configure your Journey using the Open Enrollment template, select the new option Employee Benefits Open Enrollment Selection as a task step. To avoid duplicate notifications to users from the Business Process and Journeys, configure the Open Enrollment Business Process to exclude the step from displaying in My Tasks.

What Happens If I Do Nothing?

The Open Enrollment template will function normally, but your employees won't access the Employee Benefit Open Enrollment Selection task in their Journey.

Community Link https://doc.workday.com/release-notes/en-us/hrbencore/8050408.html

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Benefits - Worker Wellbeing Profile and Program Cards

S

What's Changing

Workday transitions these Worker Wellbeing options from opt-in to automatically available (with set up required): (1) The Maintain Benefits Wellbeing Interests task so that you can configure wellbeing categories and interests; (2) The Wellbeing Interest Profile so that workers can select and update the wellbeing topics in which they have an interest.

These report fields on the Benefits Wellbeing Interest Configuration business object: All Benefits Program Cards - Wellbeing Interest; Enabled Benefits Program Cards - Wellbeing Interest; and Workers - Wellbeing Interest.

What Do I Need To Do?

Configure wellbeing cards for your workers.

Add the Benefits Wellbeing Interests card to the worker profile.

1. Access the Configure Profile Summary task.
2. Select Worker Profile.
3. Add a row and select the Wellbeing Interests option to add the card to the profile.

Add the Benefits Wellbeing Interests card to the People Experience Workspace.

1. Access the People Experience Workspace report.
2. Select Cards.
3. Select Add Card.
4. Select the Benefits Wellbeing Interests check box and click Add.
5. Click the Unpublished status prompt in the Benefit Wellbeing Interests row.
6. Select the Publish option to add the card to the Home page.

Community Link https://doc.workday.com/release-notes/en-us/hrbenenroll/7765487.html

Benefits - Worker Wellbeing Profile and Program Cards (cont.)

S

Additional Considerations

Workday also enables benefit administrators to add wellness attributes to benefit program cards from the Maintain Benefits Program task. Administrators can:

Assign 1 wellness interest attribute to the partner program card.

Choose the attribute from the delivered wellness interests that you have configured in the task, Maintain Benefits Wellbeing Interests.

Target worker interests. When you assign an interest to a program card, all users who have selected the interest can see it.

Workday delivers the new report, Benefits Wellbeing Interest Aggregated Data (secured to the Set Up: Benefits domain). The report provides analytics that you can use to derive which aspects of wellbeing are most important to your employees. You can also see how many program cards you have related to each interest, giving you insight about which programs to invest in.

What Do I Need To Do?

Configure the Wellbeing Profile categories and interests from which you want workers to select.

1. Access the Maintain Benefits Wellbeing Interests task.
2. On the Wellbeing Interests tab, add the categories and corresponding interests.
3. (Optional) Customize the names of the categories and interests to reflect your organizational needs by using the override fields.
4. Select the display locations of the card on the Display Locations tab.

What Happens If I Do Nothing?

Workers can't add wellbeing interests to their profile and administrators can't derive metrics on worker interests.

Community Link https://doc.workday.com/release-notes/en-us/hrbenenroll/7765487.html

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

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Benefits Retiring Functionalities

These include items beginning their retirement for the first time, items whose retirements have changed, and items that are fully retiring as of Workday 2024R2.

Benefits

- Benefits Worklet on Mobile

Benefits - Reclassification rules

What's Changing

Workday plans to retire the Benefits worklet on:

- Android
- iPad
- iPhone

Workday replaces the worklet with the Benefits and Pay Hub.

Additional Considerations

N/A

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/hrbenenroll/8070164.html

Compensation

Compensation Top Features

Cognizant Consultants and Product Leads have prepared the list of top features for this Workday release.

Compensation

- Improve the Manager Experience for Change Job - [S]
- Amount and Assigned Fields in Compensation - [A]
- Data Entry Check for Request One-Time Payment - [S]
- Rounding Options for FTE Proration - [S]
- Compensation Security Enhancements - [A]
- Percent-Based Commission Plans - [S]
- Rating and Class Factors for Collective Agreement - [A]
- Segmented Security for Non-Funded Plans - [S]
- Update Stock Grant Scalability - [S]
- Collective Agreements in Job Requisition - [A]
- Total Value Matrix Web Services - [A]
- Data Entry Check in Compensation Review - [A]

Legend:
[A] - Automatically Available Features
[S] - Setup Based Features

Compensation - Improve the Manager Experience for Change Job

S

What's Changing

Workday 2024R2 continues enhancements to the manager experience for Compensation in the Change Job business process begun in Workday 2024R1.

Note: The features documented here are only available using the new user experience accessed through the Maintain Change Job Templates task with the Enable Enhanced UI for this Template check box selected.

Workday makes it easier to add, update, or delete compensation plan assignments. You can now manage compensation for Manage by Basis Total (MBT) workers and make updates to the Guidelines section.

Workday also enables you to use machine learning to provide recommendations for the Compensation Plan field when adding a new assignment for a worker.

Finally, Workday provides the capability to customize compensation changes within Change Job. Workday delivers compensation change templates that allow for the display of specified sections and fields within each section.

What Do I Need To Do?

1. Access the Maintain Change Job Templates task, navigate to an existing template or create a new one, and enable the new user interface with the Enable Enhanced UI for this Template check box. Include Propose Compensation Change as a subprocess.
2. Launch Start Job Change and select a worker.
3. Fill out any appropriate changes for the worker.
4. Navigate to the Compensation step and manage any compensation changes needed for the worker.

Community Link https://doc.workday.com/release-notes/en-us/hrcomp/7814314.html

Compensation - Improve the Manager Experience for Change Job (cont.)

S

Additional Considerations

You might need to take additional steps to enable the machine learning feature depending on your organization's subscription service agreement.

What Happens If I Do Nothing?

You won't benefit from the newly simplified compensation change user experience. Users won't be able to more quickly and accurately propose new compensation assignments for workers through machine learning recommendations. You won't be able to customize and have more control over the compensation change experience for job changes.

Community Link https://doc.workday.com/release-notes/en-us/hrcomp/7814314.html

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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.

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

Compensation - Data Entry Check for Request One-Time Payment

S

What's Changing

Workday 2024R2 increases the accuracy and reliability of manually entered numeric compensation review data. Workday 2024R2 delivers the Request One-Time Payment - OTP Amount option to the new Data Entry Check Options section of the Edit Tenant Setup - HCM task.

When selected, Workday uses machine learning on historical data to validate the data you enter for the one-time payment amount. If the numeric value you enter is outside historical amounts, Workday presents an ignorable validation message. Outliers are determined based off historical entries of the one-time payment plan type.

Additional Considerations

N/A

What Do I Need To Do?

To enable the Data Entry Check for Request One-Time Payment - OTP Amount:

1. Access the Edit Tenant Setup - HCM task.
2. In the Data Entry Check section, use Select areas to switch on Data Entry Check.
3. Select the Request One-Time Payment - OTP Amount option.

What Happens If I Do Nothing?

The Switch on Data Entry Check everywhere option is enabled by default; however, this has no effect unless you enable individual areas to use DEC. You must select the Select areas to switch on Data Entry Check option to configure them.

If you don't want to use Data Entry Check at all in HCM, disable the Switch on Data Entry Check everywhere option.

Community Link https://doc.workday.com/release-notes/en-us/hrcomp/7998090.html

Compensation - Rounding Options for FTE Proration

S

What's Changing

Workday makes it easier to meet rounding requirements for part time workers. Rounding Rules can be applied to salary plans and are effective when the worker isn't 100% FTE. Workday adds the Rounding Rule prompt to the Create and Edit Salary Plans tasks, available only when both:

- You've selected the Apply FTE % option.
- The worker's FTE % isn't 100%.

Additional Considerations

This feature eliminates the need to round salary plan values with an integration before processing in payroll, saving your time and ensuring consistent values between Payroll and Compensation. Workday deliver the new Unrounded FTE Adjusted Amount report field on the Compensation Plan Assignment business object.

Workday update the Put Compensation Plans web service to add a new Rounding Rule column to Salary Plan. You can add a rounding rule only if Apply FTE% is true.

What Do I Need To Do?

When configuring a salary plan, select Appy FTE% for a part-time worker.

To uptake the new Unrounded FTE Adjusted Amount report field, you must update any reports or integrations where the field is needed.

What Happens If I Do Nothing?

Existing worker assignments remain the same. Rounding rules are always optional and only apply if configured.

Security access changes automatically. Workday grants users with the Setup: Compensation Rule and Set Up: Merit and Bonus security domains access to use rounding rule functionality. This means that users without Advanced Compensation can now configure and use rounding rules for Salary Plans and Severance.

Community Link https://doc.workday.com/release-notes/en-us/hrcomp/7697937.html

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Compensation - 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.

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

Additional Considerations

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

What Do I Need To Do?

Nothing. This feature is automatically available.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/hrcomp/8154266.html

Compensation - Percent-Based Commission Plans

S

What's Changing

Now in Workday, you can now use an On Target Earnings structure that sets commission target as a percent of a compensation basis.

Workday added new prompts to the Commission tasklet on the Request Compensation Change business process : Amount, Percent, Plan Percent.

Additional Considerations

Workday updated the prompt filed in below tasks:

Create Percent-Based Commission Plan

- Edit Commission Plan
- View Commission Plan

Reporting

Workday update these new report fields on the Commission Plan business object (secured to the Public Reporting Items domain):

- Compensation Basis
- Target %

What Do I Need To Do?

Create percent-based commission plans to uptake the new feature.

What Happens If I Do Nothing?

Workday doesn't change any existing commission plans, and you don't have to use percent-based commission plans if you don't want to.

Community Link https://doc.workday.com/release-notes/en-us/hrcomp/7699273.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

Compensation - Segmented Security for Non-Funded Plans

S

What's Changing

Workday 2024R2 makes it easier to secure non-funded compensation plans. You can now enable segmented security to restrict access to specific non-funded compensation plan assignments to specific security groups. New non funded security domain has been added.

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

Additional Considerations

Segmented Security for Non-Funded Compensation Plans. Workday updates the create Compensation Plan Security Assignment task:

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

Workday delivers several new report fields on some business objects: Adjustment For; Employee Compensation Event; Position; Worker Business Process

What Do I Need To Do?

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

What Happens If I Do Nothing?

Workday works the same as in previous updates, but you won't be able to take advantage of segmented security on your non-funded compensation plans.

Community Link https://doc.workday.com/release-notes/en-us/hrcomp/7753316.html

Advance Compensation - Update Stock Grant Scalability

S

What's Changing

With the 2024R2 release, Workday makes it easier and faster to process large numbers of stock grants without having to use web services.

Additional Considerations

You can now update stock grants at scale with the Update Stock Grant Events operation type on the Mass Operation Management task.

The Update Stock Grant Events operation type is:

- Easier to use than the Update Stock Grant web service, but can't update these fields: Shares Vested; Shares Unvested; Vesting Price; Vested As Of; Long Term Cash Amount Vested; Long Term Cash Amount Unvested
- Capable of processing many more updates than the Update Stock Grant task.

What Do I Need To Do?

To use this feature, you must:

- Copy the new Update Stock Grants (MoM) standard report to use as a custom input report for the Mass Operation Management task.
- Access the Mass Operation Management task.

What Happens If I Do Nothing?

Nothing. The existing Workday stock-related tasks work as in previous updates.

Community Link https://doc.workday.com/release-notes/en-us/hrcomp/7363002.html

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Compensation - 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

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. This feature makes it easier to implement a custom reward structure.

Additional Considerations

Workday updates the Get Compensation Matrices and Put Compensation Matrices web services. Workday adds 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 - 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

Compensation Retiring Functionalities

These include items beginning their retirement for the first time, items whose retirements have changed, and items that are fully retiring as of Workday 2024R2.

Compensation

- MBT Only: Calculated Plan Assignment Updates (DO NOT USE)
- Compensation Plan Assignment Snapshot Fields
- Compensation Review Participation Rule Framework and Report
- Snapshot of Salary Period Plan Assignment Fields

Compensation - MBT Only: Calculated Plan Assignment Updates (DO NOT USE)

What's Changing

Workday now plans to retire Calculated Plan Assignment Updates - MBT Only (DO NOT USE) mass operation type. Workday now replaces the retiring item with Calculated Plan Assignment Updates by Position mass operation type.

Additional Considerations

N/A

What Do I Need To Do?

Begin using the new mass operation type in your scheduled processes.

What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/hrcomp/6612175.html

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Compensation - Compensation Plan Assignment Snapshot Fields

What's Changing

Workday now plans to retire All fields on the Compensation Plan Assignment Snapshot business object. Workday replaces the retiring item with Compensation Plan Assignment business object .

Additional Considerations

N/A

What Do I Need To Do?

Workday extends the retirement timeline for your convenience. Workday plans to retire the fields from preview tenants after 2024-04-06 and from production tenants on 2024-09-21.

Workday recommends that you run the Compensation Plan Assignment Migration report to assess matching or alternative report fields on the new business object and replace reporting items on the retiring business object.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/hrcomp/2977193.html

Compensation - Compensation Review Participation Rule Framework and Report

What's Changing

Workday now plans to retire: The Compensation Review Participation Rule framework and the View Compensation Review Participation Rule (Do Not Use) report. Workday now replaces the retiring item with: The Compensation Review Participation Rule Sets framework and the Maintain Compensation Review Participation Rule Sets task.

Additional Considerations

N/A

What Do I Need To Do?

Workday recommends that you run the View Compensation Review Participation Rule report to assess old participation rules that you created on the Create Compensation Review Participation Rule task. You can then create new Participation Rule Sets on the Maintain Compensation Review Participation Rule Sets task to replace the old rules. Workday also recommends you review compensation review processes to ensure all reviews use the new rule sets.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/hrcomprev/6331378.html

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Compensation - Snapshot of Salary Period Plan Assignment Fields

What's Changing

Workday now plans to retire: All fields on the Salary Period Plan Assignment Snapshot business object. Workday replaces the retiring item with: Fields on the Compensation Plan Assignment business object.

Additional Considerations

N/A

What Do I Need To Do?

May impact your training materials. You can utilize the Compensation Plan Assignment Migration Tool to migrate to the new business object. Custom reports and calculated fields must be migrated.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/hrcomp/3054025.html

Core HCM

Core HCM Top Features

Cognizant Consultants and Product Leads have prepared the list of top features for this Workday release.

Core HCM

- Job Profile Skill Suggestions - [A]
- Global Address Validation - [S]
- Effective Dating Enhancements for Job Profile - [A]
- Change Job Templates New User Experience for Initiating Actions and Multiple Reasons - [S]
- Change Job New User Experience for Workflow Steps - [A]
- Hire Employee Additional Information and Redesign - [A]
- Consolidated Hire Business Process - [A]
- Manager Insights Hub - [S]
- Payment Elections on Hire - [S]

Legend:
[A] - Automatically Available Features
[S] - Setup Based Features

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 - Global Address Validation

S

What's Changing

Workday enables real-time validation of an address upon entry. You receive an alert when an official postal agency doesn't recognize the address. Workday also suggest a corrected address that when accepted, populates address fields.

Additional Considerations

With this release, Workday can validate addresses in these countries:

Argentina , Australia , Belgium , Brazil , Chile , Colombia , Croatia , Czechia , Denmark , Estonia , Finland , France , Germany , Hungary, Ireland , Italy , Latvia , Lithuania , Luxembourg , Malaysia , Mexico , Netherlands , New Zealand , Norway , Poland , Portugal , Puerto Rico , Singapore , Slovakia , Slovenia , Spain , Sweden , Switzerland , United States of America.

What Do I Need To Do?

To enable:

- If your organization's subscription agreement is MSA, access the Innovation Services Opt-In task to opt into the Global Address Validation feature. Access the Maintain Localization Settings task, select the Contact Information area, and activate Global Address Validation for a country. Select the Active check box.
- If your organization's subscription agreement is UMSA, access the Maintain Localization Settings task, select the Contact Information area, and activate Global Address Validation for a country. Select the Active check box.

To create a review or approval step that initiates when an address is invalid:

1. Access the business process definition of any Contact Change Event and select these options:

Group: groups that the business process routes to

Do no Advance: No

Type: Approval or Review

Optional: No

Community Link

https://doc.workday.com/release-notes/en-us/hrperson/6863382.html

Core HCM - Global Address Validation (cont.)

S

Additional Considerations

Workday delivers the new Address Validation Status report field on the Global Address business object (secured to the Public Reporting Items domain) that you can use in condition rules and custom reports.

Workday delivers the new Contact Change Event Has Invalid Address report field on the Contact Change Event business object (secured to the Public Reporting Items domain) that you can use in condition rules.

What Do I Need To Do?

2. Access the Related Actions next to the magnifying glass. Select the Business Process, Maintain Step Conditions.
3. Click + to add an Entry Condition. Select Create Condition Rule.
4. Add these options for the Condition Rule:

And/or: And

Source External Field or Condition Rule: Contact Change Event has Invalid Address

Relationship Operator: equal to

Comparison Type: Value specified in this filter

Comparison Value is checked

5. Click Done.

What Happens If I Do Nothing?

The new skills suggestions will be automatically available.

Community Link https://doc.workday.com/release-notes/en-us/hrperson/6863382.html

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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 - Change Job Templates New User Experience for Initiating Actions and Multiple Reasons

S

What's Changing

With this release, Workday enables you to leverage the simplified user interface for all initiating actions, and the flexibility to choose multiple reasons for a template.

Additional Considerations

Initiating Actions on Maintain Change Job Templates

Workday enables you to use the simplified user experience and create change job templates for these initiating actions on the Change Job business process:

- Change Contingent Worker Details
- Change Job
- Change Location
- Request Transfer

You can now access the Maintain Change Job Templates task and create templates for those initiating actions:

What Do I Need To Do?

To enable the simplified Change Job interface for these initiating actions, select one as part of your template configuration using the Maintain Change Job Templates task:

- Change Contingent Worker Details
- Change Job
- Change Location
- Request Transfer

To configure multiple reasons for new or existing templates on the Maintain Change Job Templates task, select:

- The Enable Enhanced UI for this Template check box.
- Multiple reasons from the Select Reason for Templates prompt.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/8157270.html

Core HCM - Change Job Templates New User Experience for Initiating Actions and Multiple Reasons (cont.)

S

Additional Considerations

- Your existing configuration for those initiating actions on the Change Job business process will apply to any templates you configure. Workday recommends that you review that configuration for the Change Job business process on the Edit Business Process Security Policy task.

- Workday automatically selects the Enable Enhanced UI for this Template check box for any templates that include those initiating actions. To no longer use the simplified user experience for an initiating action, you can inactivate or delete the template.

- You can initiate a Change Job or Request Transfer from multiple places, such as the Hire business process. Any templates you configure for Change Job and Request Transfer will apply anywhere that those initiating actions are accessible.

What Happens If I Do Nothing?

The Change Job user experience for the other initiating actions will remain unchanged.

Users won't see Why are you making this change? field when initiating a change job template.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/8157270.html

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Core HCM - Change Job Templates New User Experience for Initiating Actions and Multiple Reasons (cont.)

S

Additional Considerations

Configure Multiple Reasons

Workday enables you to configure multiple reasons for new or existing templates that have the Enable Enhanced UI for this Template check box selected on the Maintain Change Job Templates task.

If you configure multiple reasons, Workday will display the Why are you making this change? field on the change job event. Otherwise, Workday won't display the field.

Note: Users can still only select one reason for the change job event.

This feature eliminates the need for you to create duplicate templates, and provides you with more flexibility.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/8157270.html

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

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

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 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

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

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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

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, Workday recommends 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 - Manager Insights Hub

S

What's Changing

With this release, Workday enhances Manager Insights Hub.

You can now configure the Hub to tailor content for your organization, helping managers focus on what requires their attention.

Workday also enables the hub for additional solutions and functional areas within Core HCM, including Staffing, Core Compensation, and Time Off and Leave. This is in addition to the existing functionality within Talent Optimization and Peakon.

Additional Considerations

Please refer to the community link for the full extensive list of additional considerations and changes

What Do I Need To Do?

To access the Manager Insights Hub, configure the new Manage: Manager Insights Hub domain (secured to the Manager Insights Hub functional area). Consider the other domains that you want to enable as part of your Manager Insights Hub setup.

Access to pages, sections, tasks, and reports depends on your organization's Workday product subscriptions. The individual security permissions of supervisory organization managers determines what data they can view, and which tasks, reports and cards they can use.

To customize the Manager Insights Hub, access the Maintain Hubs report.

What Happens If I Do Nothing?

Managers can't access the Manager Insights Hub.

If you were previously using the Manager Insights Hub as part of the Talent Optimization product, managers will continue to be able to access the Manager Insights Hub, via the renamed Manage: Talent Optimization in Manager Hub domain.

Community Link https://doc.workday.com/release-notes/en-us/hrcore/8072340.html

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Core HCM - Payment Elections on Hire

S

What's Changing

With this release, Workday enables you to configure the Hire business process to include a payment elections subprocess.

Additional Considerations

Workday enables you to configure the Payment Election Enrolment Event business process type as a subprocess of:

- The Hire business process.
- Rule based consolidated templates for the Hire business process.

When you configure Payment Election Enrolment Event as a subprocess of a consolidated template for Hire, Workday recommends that you also configure Change Organization Assignments for Worker. This ensures efficiency in processing payroll.

What Do I Need To Do?

To configure Payment Election Enrolment Event as a subprocess of the Hire business process, edit the business process definition to add Manage Payment Elections as an action step.

For rule based consolidated templates, you must first configure the template:

- Access the View Business Process Type report and select Hire.
- From the related actions menu of Hire, select Business Process > Configure Consolidated Template.
- Add a row for Payment Election Enrolment Event and any other subprocesses you want to include.

When you have configured the template, edit the business process definition for Hire to add Manage Payment Elections as an action for the Payment Election Enrolment Event subprocess.

Community Link

https://doc.workday.com/release-notes/en-us/payexp/8074379.html

Core HCM - Payment Elections on Hire (cont.)

S

Additional Considerations

To add payment elections for a worker that you can use in payroll, you must have: (1) Configured payment election rules; (2) Assigned the worker to a pay group.

What Happens If I Do Nothing?

Managers can't access the Manager Insights Hub.

If you were previously using the Manager Insights Hub as part of the Talent Optimization product, managers will continue to be able to access the Manager Insights Hub, via the renamed Manage: Talent Optimization in Manager Hub domain.

Community Link https://doc.workday.com/release-notes/en-us/payexp/8074379.html

Core HCM Retiring Functionalities

These include items beginning their retirement for the first time, items whose retirements have changed, and items that are fully retiring as of Workday 2024R2.

Core HCM

- Assign Roles and Organization Roles Task
- Personal Information
- Other IDs (Do Not Use)
- The Locations (Do Not Use) report data source
- Assign Roles to Worker Initiating Action
- Active Organizations and Subordinates Report Field

Compensation - Assign Roles and Organization Roles Task

What's Changing

Workday now plans to retire these tasks when you access them using the Roles related action on a position restriction or the Security Profile related action on a worker:

- Assign Organization Roles
- Assign Roles

Workday replaces the retiring item with these tasks:

Assign Roles - Add/Remove

Assign Roles - Change Assignments

Additional Considerations

N/A

What Do I Need To Do?

May impact your training materials and may require additional testing. Workday recommends that you use the replacement tasks instead as they are more effective and prevent role assignment errors. You can also continue using the Assign Roles task when you access it from the Roles related action on a role assigner.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/org/3933176.html

Compensation - Personal Information

What's Changing

Workday now plans to retire the following:

1. Report fields on the Person business object:
   - Ethnicity (Multiple Allowed) (Do Not Use)
   - Race/Ethnicity (Do Not Use)

2. On the Worker business object:
   - Disability (Do Not Use)
   - Ethnicity (Multiple Allowed) (Do Not Use)
   - Race/Ethnicity (Do Not Use)

3. On the Edit Tenant Setup - Global task:
   - Hispanic/Latino check box
   - Last Medical Exam - Track for Worker in These Countries prompt

4. These additional items:
   - Race/Ethnicity column on the Maintain Ethnicities task.
   - Maintain Disability Configuration - Removed Setup task.

What Do I Need To Do?

May impact your training materials. Workday recommends that you use the new report fields on custom reports.

What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/hrpersoninf/1486073.html

Compensation - Personal Information (cont.)

What's Changing

Workday now replaces the said retiring item with:

1. Fields on the Maintain Localization Settings task:
   - Hispanic/Latino
   - Race/ Ethnicity
   - Disability
   - Last Medical Exam

2. Report fields on the Person business object:
   - Ethnicities (Multiple Allowed - Locale Sensitive)
   - Race/Ethnicity (Locale Sensitive)

3. Report fields on the Worker business object:
   - Disability (Locale Sensitive)
   - Ethnicities (Multiple Allowed - Locale Sensitive)
   - Race/Ethnicity (Locale Sensitive)

Additional Considerations

N/A

Community Link https://doc.workday.com/release-notes/en-us/hrpersoninf/1486073.html

Compensation - Other IDs (Do Not Use)

What's Changing

Workday now plans to retire Other IDs (Do Not Use) report field. Workday then replaces the retiring item with Other IDs report field.

Additional Considerations

N/A

What Do I Need To Do?

May impact your training materials. Workday will rename the old report field with (Do Not Use) when Workday delivers the replacement.

What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/hrpersoninf/1193014.html

Compensation - The Locations (Do Not Use) report data source

What's Changing

Workday now plans to retire the Locations (Do Not Use) report data source. Workday replaces the retiring item with RDSs:

- Instructional Locations
- Locations
- Locations Used as Business Site

Additional Considerations

N/A

What Do I Need To Do?

Workday recommends that you use the replacement RDSs.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/org/4371637.html

Compensation - Assign Roles to Worker Initiating Action

What's Changing

Workday now plans to retire the Assign Roles to Worker initiating action. Workday replaces the retiring item with the Assign Roles - Change Assignments for Worker initiating action.

Additional Considerations

N/A

What Do I Need To Do?

May impact your training materials and require additional testing. Workday recommends you update your business process definitions to use the Assign Roles - Change Assignments for Worker initiating action and stop using the Assign Roles to Worker initiating action. You can configure the allowed security groups for the Assign Roles - Change Assignments for Worker initiating action within the 'Assign Roles' business process policy. Workday also recommends you remove all security groups from the Assign Roles to Worker initiating action.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/org/5474314.html

Compensation - Active Organizations and Subordinates Report Field

What's Changing

Workday now plans to retire the Prompt - Currently Active Organizations and Subordinates report field on the Global business object. Workday replaces the retiring item with the Prompt - Active Organizations and Subordinates report field on the Global business object.

Additional Considerations

N/A

What Do I Need To Do?

May impact your training materials and require additional testing. Replace the Prompt - Currently Active Organizations and Subordinates report field with the Prompt - Active Organizations and Subordinates report field on any reports that use the deprecated report field.

What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/org/5281413.html

Financial Management

Financial Management Top Features

Cognizant Consultants and Product Leads have prepared the list of top features for this Workday release.

Financial Management

- Clear Open Accounts Receivable with Customer Payments - [A]
- Manual Intercompany Matching - [S]
- Close and Consolidation Hub - [S]
- Dynamic Supplier Payment Credit Adjustments - [S]
- Worker Absence and Other Project Allocation in Resource Forecaster - [A]
- Transfer Project Transactions - [S]
- Awareness for Expense Receipt Submission - [S]
- Mass Change Buyer on Purchase Order - [A]
- Hold Reasons for Supplier Invoices and Invoice Adjustments - [S]
- Supplier Accounts Hub - [S]

Legend:
[A] - Automatically Available Features
[S] - Setup Based Features
[R] - Request Professional Services Support

Financial Management - 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: (1) Edit Customer Payment; (2) 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: (1) Create Customer Deposit; (2) Update Remittance Advice.

After you submit your zero-amount payment application, Workday now creates a customer payment with: (1) Payment Status: Complete; (2) 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

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Financial Management - Manual Intercompany Matching

S

What's Changing

Workday enables you to manually match intercompany journal lines so that you can identify the unmatched differences when reviewing the intercompany reconciliation report.

Additional Considerations

The grid for the Intercompany Matching on Journal Lines task has a 5,000 row limit which may make it difficult to perform all intercompany matching manually. In a future update, Workday plans to deliver:

Automated intercompany matching.

A new task for marking intercompany journal lines as unavailable for matching, which you can use to exclude converted intercompany journal lines from matching.

What Do I Need To Do?

Configure these new security domains:

- Process: Account Certifications - Intercompany Cancel All Match
- Process: Account Certifications - Intercompany Cancel Match
- Process: Account Certifications - Intercompany Create Match

Access the Set Up Journal Lines Matching task to confirm the Match On Type for intercompany matching.

Access the Intercompany Matching on Journal Lines task to match journal lines across multiple companies.

Configure a sequence generator ID to distinguish intercompany matching IDs from transaction matching IDs.

What Happens If I Do Nothing?

If you use custom reports that return all match statuses, the results might include matched intercompany journal lines.

Community Link https://doc.workday.com/release-notes/en-us/fincls/8038100.html

Financial Management - Close and Consolidation Hub

S

What's Changing

Workday delivers a new Close and Consolidation Hub that enables you to complete and view close and consolidation tasks and reports from a centralized location. The hub also provides an overview of your close and consolidation data.

Additional Considerations

Workday recommends that you use the Maintain Hubs task to configure and customize the Close and Consolidation Hub based on the requirements of the users. Example: If the revaluation task isn't used, you can hide the task from view. You can't customize the hub for individual users. Any changes you make to the hub affect all users.

What Do I Need To Do?

To access the Close and Consolidation Hub, configure the new Manage: Close and Consolidation Hub domain (secured to the Advanced Close and Consolidation functional area).

To view all the tasks, reports and the new cards on the Overview page of the Close and Consolidation Hub, configure access to these domains:

- Public Reporting Items
- Process: Consolidation Data Capture
- Set Up: Ledger and Book

To customize the Close and Consolidation Hub, access the Maintain Hubs task. You can't customize the hub for individual users. Any changes you make to the hub affect all users. The Suggested Links section only displays when you configure the hub using the Maintain Hubs task.

Community Link https://doc.workday.com/release-notes/en-us/fincls/7960979.html

Financial Management - Close and Consolidation Hub (cont.)

S

Additional Considerations

The reports and dashboards provided in the hub should be replaced with reports specific to the user. Examples: Custom Income Statement and Balance Sheet, reports from the RPT Consolidations and RPT Financial Accounting configuration catalog packages.

Hub configuration is enabled for OX 2.0 migration.

What Happens If I Do Nothing?

You won't be able to access the Close and Consolidation Hub. This means you won't be able to view close and consolidations insights, tasks, or reports from a centralized location.

Community Link https://doc.workday.com/release-notes/en-us/fincls/7960979.html

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Financial Management - Dynamic Supplier Payment Credit Adjustments

S

What's Changing

Workday enhances dynamic supplier payment date functionality to enable you to automatically apply supplier invoice credit adjustments to invoice payments during settlement. You can now net pending credit memos against supplier invoices irrespective of their due dates.

Workday now provides a new Apply Supplier Credit Adjustments to First Payment Due check box in the Settlement and Bank Account Options section on the Edit Tenant Setup - Financials task. The new check box displays when you enable the existing Dynamic Supplier Payment Date option to default the supplier payment date based on either the discount date, due date, or settlement run date.

You can select this check box to automatically apply supplier credit adjustments to the first payment that's due irrespective of their due dates when you settle supplier invoices.

Additional Considerations

N/A

What Do I Need To Do?

1. Access the Edit Tenant Setup - Financials task.
2. Select the Dynamic Supplier Payment Date check box in the Settlement and Bank Account Options section.
3. Select a value to use for the Default Supplier Payment Date (Discount Date, Due Date, or Settlement Run Date).
4. Select the new Apply Supplier Credit Adjustments to First Payment Due check box.

What Happens If I Do Nothing?

When you only enable the Dynamic Supplier Payment Date, Workday groups the supplier credit adjustments based on the payment date value you selected. If there aren't any dates that match the credit adjustments, Workday excludes them from the settlement run.

Community Link https://doc.workday.com/release-notes/en-us/finset/7108536.html

Financial Management - 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

Financial Management - Transfer Project Transactions

S

What's Changing

With this release, Workday delivers a new Transfer Project Transactions task that enables you to transfer transactions from one project, phase, or task to another, and split transactions.

You can access the task in 2 ways:

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

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

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

Additional Considerations

N/A

What Do I Need To Do?

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

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

What Happens If I Do Nothing?

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

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

Financial Management - Awareness for Expense Receipt Submission

S

What's Changing

With the 2024R2 release, Workday enables you to spread awareness for expense receipt submission by leveraging SMS and Expenses Hub.

This helps to spread awareness to first time Expenses Hub users regarding receipt submission, resulting in timely submission of expense receipts.

Additional Considerations

Workday adds a new card in Expenses Hub letting users know how they can submit expenses. Workday also enables users to send the information to their phones with a text message.

Workday adds a new Email Forwarding Address section with a new Expense Receipt Email Forwarding Address field in the Configure Email Ingestion Settings task, enabling you to specify an email address for receipt forwarding.

Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement.

What Do I Need To Do?

To display the Email Forwarding option on the new card:

- Go to Email Ingestions task and select Expense Receipt in Notification Type.
- Notice the Expense Receipt Email Forwarding Address field is available.
- Administrators must enter an email address associated with the tenant's expense receipt submission. Example: Receipts@workday.com. The email entered displays in the new card.

To display the option to send information by Phone link:

- Opt-in to Workday Messaging service on the Innovation Services Opt-In task in the Cross Application Services category on the Available Services tab.
- Ensure users are opted-in to SMS.
- Ensure Users have a mobile phone defined on their profile.

Community Link https://doc.workday.com/release-notes/en-us/finexp/7998131.html

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Financial Management - Awareness for Expense Receipt Submission (cont.)

S

Additional Considerations

Workday Messaging is currently available for: (1) Canadian, UK, and U.S. mobile phone numbers, (2) Customers who have a live Production tenant.

Workday Messaging doesn't support: (1) Attachments or rich-text formatting in SMS messages, (2) Mobile phone numbers with extensions.

What Do I Need To Do?

To ensure SMS notification delivery:

- Access the Edit Tenant Setup - Notifications task.
- Select Expenses tab in the Notification Delivery Settings.
- Select the Override Parent Notification Type Settings check box.
- For Rule, create a Notification Routing Rule and give it a name.
- For Channel Frequencies:
  - Select Add.
  - For Channel, select SMS.
  - For Default Frequency, select Immediately.

What Happens If I Do Nothing?

The new card will appear in Expenses Hub. To hide the card, access the Maintain Hubs report.

Community Link https://doc.workday.com/release-notes/en-us/finexp/7998131.html

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Financial Management - 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.

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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Financial Management - Mass Change Buyer on Purchase Order (cont.)

A

Additional Considerations (Cont.)

As you complete new Mass Change Buyer on Purchase Order task, consider:

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

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

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

Financial Management - Mass Change Buyer on Purchase Order (cont.)

A

Additional Considerations (Cont.)

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

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

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

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

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Financial Management - Hold Reasons for Supplier Invoices and Invoice Adjustments

S

What's Changing

With the 2024R2 release, Workday enables you to specify a configurable reason code when you place a supplier invoice or supplier invoice adjustment on hold from payment.

Additional Considerations

Workday delivers these new tasks, web services, and custom report fields for this feature:

- Maintain Supplier Invoice Hold Reasons task
- On Hold check box and Hold Reason on the Create, Change, Edit, Delete, View Supplier Invoice and Supplier Invoice Adjustment tasks
- Get Invoice Hold Reasons web service
- Put Invoice Hold Reasons web service
- Hold Reason custom report field

What Do I Need To Do?

Use the Maintain Supplier Invoice Hold Reasons task to add hold reasons to your tenant.

What Happens If I Do Nothing?

If you do nothing, you can't use supplier invoice hold reasons in your tenant, but you are still able to place invoices and invoice adjustments on hold.

Community Link https://doc.workday.com/release-notes/en-us/finsa/7717941.html

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Supplier Accounts - Hold Reasons for Supplier Invoices and Invoice Adjustments (cont.)

S

Additional Considerations

Workday also update these web services to support this feature:

- Import Supplier Invoice
- Submit Supplier Invoice
- Import Supplier Invoice Adjustment
- Submit Supplier Invoice Adjustment

As you configure supplier invoice hold reasons, consider:

- Workday doesn't deliver any default invoice hold reasons to customer tenants. You have the flexibility to add the hold reasons that make the most sense for your business needs.
- This field is not automatically delivered in the Find Supplier Invoices report. If you want to add the Supplier Invoice Hold Reason to this report, copy the standard report and add the field to the report columns.
- You can use custom validations on the supplier invoice to require a hold reason when a supplier invoice or invoice adjustment is on hold.

Community Link https://doc.workday.com/release-notes/en-us/finsa/7717941.html

Supplier Accounts - Supplier Accounts Hub

S

What's Changing

With the 2024R2 release, Workday delivers a central workspace for the Accounts Payable organization to access all frequently used tasks, reports, and metrics.

Additional Considerations

Workday delivers these new reports to enable you to set up and maintain the Hub:

- Maintain Hubs
- Supplier Accounts Hub

Workday enables you to add Supplier Accounts Hub as a worklet using Maintain Dashboards - Home.

They have updated these domain security policies to enable you to view the Hub, reports, and metrics:

- Reports: Supplier Accounts
- View: Supplier Accounts Hub
- View: Supplier Accounts Hub Manager Metrics

What Do I Need To Do?

Maintain Hubs - configure the Supplier Accounts Hub to meet your business requirements. From here you can:

- Configure Overview to create and edit announcements and manage the sections and cards on the hub Overview page.
- Use Customize Hub Navigation to override sidebar navigation item titles.
- Use Configure Suggested Links to configure links to custom reports and related tasks that you want users to access from the Supplier Accounts Hub.

If you want to use the links Workday delivers, select the Use Default Settings option.

If you want to include additional links or remove links on the default settings, choose the Configurable tab.

Note: There is no option to automatically combine both lists. You must add default suggested links manually to the configured list if you want to make additions or deletions.

Community Link https://doc.workday.com/release-notes/en-us/finsa/8014184.html

Financial Management - Supplier Accounts Hub (cont.)

S

Additional Considerations

Workday also delivers these new report fields that you can use in custom reports for the Hub:

- Invoice Entry Date to Submit Date Days: the number of days between the date you create a supplier invoice and the date you submit it.
- Supplier Invoice Creation Date: the date on which you create the supplier invoice.
- Supplier Invoice Document Source: the external or internal source of the supplier invoice.
- Supplier Invoice Purchase Type: the type of purchase for the supplier invoice.

What Do I Need To Do?

Enable and configure - Domain Security for the following domains:

- Reports: Supplier Accounts
- View: Supplier Accounts Hub
- View: Supplier Accounts Manager Metrics - View

(Optional) Add the Supplier Accounts Hub as a Worklet using Maintain Dashboards - Home.

(Optional) Navigate to My Account > Change Preferences to set up the Supplier Accounts Hub as your Workday home page.

What Happens If I Do Nothing?

You continue to be able to access individual tasks and reports via Workday global search. You don't have access to new card metrics under the Manager Metrics section of the Supplier Accounts Hub.

Community Link https://doc.workday.com/release-notes/en-us/finsa/8014184.html

Financial Management Retiring Functionalities

These include items beginning their retirement for the first time, items whose retirements have changed, and items that are fully retiring as of Workday 2024R2.

Financial Management

- Satisfactory Academic Progress Rule
- Purchase Order Line Date Report Field
- Expenses Worklet
- Find Customer Invoices Report Field
- Direct Ownership Only Check Box on the Non-Controlling Interest Tab
- Cash Balance Check Event
- Investment in Subsidiary/Subsidiary Equity
- Receivables Aging Report
- Average Daily Balance Date Report Field
- Maintain Payment Elections (Do Not Use)
- Student Financial Services Reaction Rule Set

Financial Management - Satisfactory Academic Progress Rule

What's Changing

Workday now plans to retire these tasks/report:

- Edit Satisfactory Academic Progress Rule Set task
- Create Satisfactory Academic Progress Rule Set task
- Maintain Satisfactory Academic Progress Policy task
- The View Satisfactory Academic Progress Rule Set report

Workday replaces the retiring item with the Maintain Satisfactory Academic Progress Policy task.

Additional Considerations

N/A

What Do I Need To Do?

If you have multiple institutions, Workday suggests using the new task now instead.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/stufad/5236043.html

Financial Management - Purchase Order Line Date Report Field

What's Changing

Workday now plans to retire the Purchase Order Line Date report field on the Purchase Order Line business object. Workday replaces the retiring item with the Document Date report field on the Common Financial Line Dimensions business object.

Additional Considerations

N/A

What Do I Need To Do?

May impact your training materials. Workday recommends that you use the new report field instead.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/smorder/4271074.html

Financial Management - Expenses Worklet

What's Changing

Workday now plans to retire the Expenses worklet. Workday replaces the retiring item with the Expenses Hub.

Additional Considerations

N/A

What Do I Need To Do?

Workday recommends that you remove the Expenses worklet from the Home page and replace it with the Expenses Hub.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/finexp/5894306.html

Financial Management - Find Customer Invoices Report Field

What's Changing

Workday now plans to retire the Find customer invoices report. Workday replaces the retiring item with the Find customer invoices for company report.

Additional Considerations

N/A

What Do I Need To Do?

May impact your training materials.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/fincust/3495951.html

Financial Management - Direct Ownership Only Check Box on the Non-Controlling Interest Tab

What's Changing

Workday now plans to retire the Direct Ownership Only Check Box on the Non-controlling Interest tab of the Eliminations Rules task.

Additional Considerations

N/A

What Do I Need To Do?

Select the check box when you run the Eliminations Rules task so that your calculations will not change after the deprecation.

What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/fincls/6913257.html

Financial Management - Cash Balance Check Event

What's Changing

Workday now plans to retire the Cash Balance Check Event (Do Not Use) business process including these:

Task:

- Check Cash Balance (Do Not Use)
- Create Cash Balance Check Treatment Rule (Do Not Use)
- Edit Cash Balance Check Treatment Rule (Do Not Use)
- Delete Cash Balance Treatment Rule (Do Not Use)
- View Cash Balance Check Treatment Rule (Do Not Use)

Web services:

- Get Cash Balance Check Treatment Rules (DEPRECATED)
- Put Cash Balance Check Treatment Rule (DEPRECATED)

What Do I Need To Do?

May impact your training materials and require additional testing.

Workday recommends that you start using the new functionality.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/finset/4167248.html

Financial Management - Cash Balance Check Event (cont.)

What's Changing

Workday replaces the retiring items with the Cash Balance Check Event business process.

Tasks:

- Check Cash Balance Maintain
- Cash Balance Check Options

Web services:

- Get Cash Balance Check Options
- Put Cash Balance Check Options

Additional Considerations

N/A

What Do I Need To Do?

May impact your training materials and require additional testing.

Workday recommends that you start using the new functionality.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/finset/4167248.html

Financial Management - Investment in Subsidiary/Subsidiary Equity

What's Changing

Workday now plans to retire the Investment in Subsidiary/Subsidiary Equity tab on the Maintain Elimination Rules task. Workday replaces the retiring items with the Tabs on the Maintain Elimination Rules task:

- Intercompany/Interworktag
- Noncontrolling Interest Activity

Additional Considerations

N/A

What Do I Need To Do?

May impact your training materials.

Workday recommends that you use the Intercompany/Interworktag and the Noncontrolling Interest Activity tabs on the Maintain Elimination Rules task.

What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/fincls/5483817.html

Financial Management - Receivables Aging Report

What's Changing

Workday now plans to retire these reports:

- Receivables Aging (Do Not Use)
- Receivables Aging Detail (Do Not Use)

Workday replaces the retiring items with these reports:

- Receivables Aging Standard
- Receivables Aging Detail Standard

Additional Considerations

N/A

What Do I Need To Do?

May impact your training materials.

Workday recommends that you start using the new reports.

What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/fincust/4297783.html

Financial Management - Average Daily Balance Date Report Field

What's Changing

Workday now plans to retire these Average Daily Balance report fields on the Journal Line business object:

- Average Daily Balance Line Net Activity Amount
- Average Daily Balance Line Net Activity Transaction Amount
- Translated Activity Amount

Additional Considerations

N/A

What Do I Need To Do?

May impact your training materials.

Workday recommends that you opt in to the Average Daily Balance Performance Enhancements feature on the Maintain Feature Opt-Ins report.

What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/fincls/5511501.html

Financial Management - Maintain Payment Elections (Do Not Use)

What's Changing

Workday now plans to retire the Maintain Payment Elections (Do Not Use) task and View Student Payment Elections report.

Additional Considerations

Workday replaces the retiring item with Maintain Payment Elections task and Payment Elections report.

What Do I Need To Do?

May impact your training materials.

Workday recommends that you start using the new task and report.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/paywdpymt/1725776.html

Financial Management - Student Financial Services Reaction Rule Set

What's Changing

Workday now plans to retire the Maintain Payment Elections (Do Not Use) task and View Student Payment Elections report.

Additional Considerations

Workday now plans to retire

These report fields on the Student Financial Services Reaction Rule Set (Do Not Use) business object:

- Name (Do Not Use).
- Student Process Trigger Rule Set Line (Do Not Use).

These report fields on the Student Process Trigger Rule Set Line (Do Not Use) business object:

- Manual Review Date Control (Do Not Use).
- Student Reaction Reason (Do Not Use).
- Student Reaction Method (Do Not Use).

What Do I Need To Do?

May impact your training materials and require additional testing.

Workday recommends that you replace the old report fields on any custom reports or integrations.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-11-08

Community Link https://doc.workday.com/release-notes/en-us/stufad/6046550.html

Financial Management - Student Financial Services Reaction Rule Set (cont.)

Additional Considerations

These business objects:

- Student Financial Services Reaction Rule Set (Do Not Use).
- Student Process Trigger Rule Set Line (Do Not Use).
- Date Control (Do Not Use).
- Student Reaction Method (Do Not Use).
- Student Reaction Reason (Do Not Use).

Community Link https://doc.workday.com/release-notes/en-us/stufad/6046550.html

Integration

Integration Top Features

Cognizant Consultants and Product Leads have prepared the list of top features for this Workday release.

Integration

- Payroll Partner Payment Outbound Integration - [S]
- New Fields in UBL 2.1 Electronic Invoice Connector - [S]
- Core Connector: Payroll Check Printing Integration - [A]
- Purge Pre-Hire Data - [A]
- Handle Import Processing Errors Header for Web Services - [A]
- Supplier Sales Order Number and Shipping Method for Purchase Order Processing with EDI 850 - [S]
- Integration Event Statuses - [A]
- Handle Import Processing Errors Check Box for EIBs - [A]
- Form Completion Assistant - [A]
- Security for Personal Information Items - [A]

Legend:
[A] - Automatically Available Features
[S] - Setup Based Features

Integration - Payroll Partner Payment Outbound Integration

S

What's Changing

Workday enables you to more easily share historical payroll data about employment verification, unemployment claims, and tax credits with your third-party payroll vendor.

Workday adds a new Payroll Partner Payment Outbound integration template. You can use this integration to:

- Extract up to 3 years of payroll data and use it to create an output payment file.
- Configure the payroll data that you extract to comply with your third-party payroll vendor's specifications.

This integration helps improve efficiency and reduce manual labor.

Additional Considerations:

N/A

What Do I Need To Do?

You must create and configure an integration based on the Payroll Partner Payment Outbound integration template.

Workday recommends that you confirm with your vendor that they support this feature.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/paywdi/8128912.html

Integration - New Fields in UBL 2.1 Electronic Invoice Connector

S

What's Changing

With the 2024R2 release, Workday delivers and exposes some optional fields that you can configure on the UBL 2.1 Electronic Invoice Connector to extract additional customer invoice details in the output file.

This update enables you to include the additional mandatory fields for supporting Tier-1 country specific invoicing requirements. This reduces invoicing costs by automating the collection process.

Additional Considerations

Workday delivers a new Concatenate Additional Address Line integration attribute on the UBL 2.1 Electronic Customer Invoice template that you can enable to include additional addresses from Lines 3 to 9 in a single third line, separated by spaces, in the UBL output file.

What Do I Need To Do?

Access the Create Integration System task and select the UBL 2.1 Electronic Customer Invoice template. You can also edit the existing integration system if you have one.

From the related actions menu of the integration system, select Configure Integration Attributes and click + for the Concatenate Additional Address Line row. Select the Value check box to include additional addresses from Lines 3 to 9 in a single third line, separated by spaces, in the UBL output file.

(Optional) From the related actions menu of the integration system, select Configure Integration Maps. For any of the new maps, click + to select the Internal Value for a desired country and specify the External Value.

From the related actions menu, select Configure Integration Field Attributes. Select the Include in Output check box for all the listed fields that you want to enable.

Community Link https://doc.workday.com/release-notes/en-us/finint/8106703.html

Integration - New Fields in UBL 2.1 Electronic Invoice Connector (cont.)

S

Additional Considerations

Workday delivers these new integration maps for the UBL 2.1 Electronic Customer Invoice template, enabling you to associate company and customer Tax IDs to an external value as schemeID or target output field in the UBL 2.1 XML file:

- Company Tax ID Type to SchemeID
- Company Tax ID Type to UBL Target Field
- Customer Tax ID Type to SchemeID
- Customer Tax ID Type to UBL Target Field

What Happens If I Do Nothing?

You won't be able to extract additional data in the XML output file.

Community Link https://doc.workday.com/release-notes/en-us/finint/8106703.html

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Integration - New Fields in UBL 2.1 Electronic Invoice Connector (cont.)

S

Additional Considerations

Workday delivers these new Integration Field Attributes that you can enable to suit your business needs:

1. Original Invoice and Project Reference:

- InvoiceDetail / BillableProject / Name
- InvoiceDetail / CreditedCustomerInvoice / GaplessInvoiceNumber
- InvoiceDetail / CreditedCustomerInvoice / InvoiceNumber
- InvoiceDetail / RelatedCustomerInvoice / GaplessInvoiceNumber
- InvoiceDetail / RelatedCustomerInvoice / InvoiceNumber
- InvoiceLine / BillableProject / Name
- InvoiceLine / RelatedContractLine / ContractNumber

2. Additional Details such as Start, End, Due Dates and External Doc Location:

- AdditionalDetail / DocumentLink
- AdditionalDetail / DueDate
- AdditionalDetail / FromDate
- AdditionalDetail / ToDate
- InvoiceLine / AdditionalDetail / FromDate
- InvoiceLine / AdditionalDetail / ToDate

Community Link https://doc.workday.com/release-notes/en-us/finint/8106703.html

Integration - New Fields in UBL 2.1 Electronic Invoice Connector (cont.)

S

Additional Considerations

3. Buyer and Seller Identifier:
   - SoldToCustomer / Name
   - TaxSummary / AdditionalCompanyTaxIDs / TaxID / NationalTaxIDCode
   - TaxSummary / AdditionalCompanyTaxIDs / TaxID / Number
   - TaxSummary / AdditionalCompanyTaxIDs / TaxID / Type
   - TaxSummary / AdditionalCustomerTaxIDs / TaxID / NationalTaxIDCode
   - TaxSummary / AdditionalCustomerTaxIDs / TaxID / Number

Community Link https://doc.workday.com/release-notes/en-us/finint/8106703.html

Integration - New Fields in UBL 2.1 Electronic Invoice Connector (cont.)

S

Additional Considerations

4. Payment Account Identifier:

- PaymentDetail / DirectDebitMandate / Reference
- PaymentDetail / DirectDebitMandate / BankAccountNumber
- PaymentDetail / DirectDebitMandate / IBAN
- PaymentDetail / PayeeBank / BankAccountNumber
- PaymentDetail / PayeeBank / BankIdentificationCode
- PaymentDetail / PayeeBank / IBAN
- PaymentDetail / PayeeBank / BankID

Community Link https://doc.workday.com/release-notes/en-us/finint/8106703.html

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 - 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

Integration - 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

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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 - Supplier Sales Order Number and Shipping Method for Purchase Order Processing with EDI 850

S

What's Changing

With this release, Workday enables you to issue purchase orders with supplier sales order numbers if you have procedure information enabled when using EDI 850 to reduce work for bill-only and consignment orders. You can now also include the shipping method when issuing purchase orders with EDI 850 to ensure rush orders are processed correctly.

Workday updates these items by adding a new EDI Code field that you can use to specify a shipping method:

- Maintain Shipping Information task
- View Shipping Information report

Workday also adds the new EDI Code field to these web services:

- Get Shipping Methods
- Put Shipping Method

Workday now populates the EDI code in the header TD512 segment of your outbound EDI 850 integration XML files when the shipping method is defined with an EDI code. The segment isn't populated if there isn't an EDI code for the shipping method.

What Do I Need To Do?

In order to opt-in to rush order EDI codes: Use the Maintain Shipping Information task to add an EDI code as a shipping method under the Shipping Methods tab.

In order to set up the Supplier Sales Order Number field:

1. On the Edit Tenant Setup - Financials task, select the Enable Healthcare Options checkbox in the Procurement Options section.
2. Create a requisition type in the Maintain Requisition Types task with the Procedure Information requisition type option.

Community Link https://doc.workday.com/release-notes/en-us/smorder/7610427.html

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Integration - Supplier Sales Order Number and Shipping Method for Purchase Order Processing with EDI 850 (cont.)

What's Changing

When you use EDI 850 to issue purchase orders to suppliers, you can use the new Supplier Sales Order Number field to include a supplier sales order number on your purchase orders. Workday adds the new Supplier Sales Order Number field under the Procedure Information tab for requisitions, purchase orders, and change orders.

Workday also updates these procurement web services by adding the new Supplier Sales Order Number field, so that you can view or edit the supplier sales order number:

- Get Purchase Orders
- Get Purchase Order Change Orders
- Get Requisitions
- Submit Purchase Order Change Order
- Submit Purchase Order
- Submit Requisition

What Do I Need To Do?

3. Create a purchase order type in the Maintain Purchase Order Types task with the Procedure Information purchase order type option.
4. On the Configure Optional Fields task, configure the Supplier Sales Order Number field to be visible by removing the Hide for All row for the following areas:

- Change Order
- Purchase Order Event
- Requisition Event.

Community Link https://doc.workday.com/release-notes/en-us/smorder/7610427.html

Integration - Supplier Sales Order Number and Shipping Method for Purchase Order Processing with EDI 850 (cont.)

S

What's Changing

Workday updates the Configure Optional Fields task by adding Supplier Sales Order Number as a field that you can configure to display for users in these functional areas: (1) Change Order; (2) Purchase Order Event; (3) Requisition Event; (4) By default, Workday hides the Supplier Sales Order Number field.

Workday now populates the supplier sales order number in the header REF^VN segment of your outbound EDI 850 integration XML files.The segment won't be generated if the supplier sales order number isn't populated on the purchase order.

Workday also delivers these new report fields (secured to the Public Reporting Items domain) that you can use in your custom reports:

- EDI Code, on the Shipping Method business object
- Supplier Sales Order Number, on the Abstract Spend Healthcare Document business object

Additional Considerations

N/A

What Happens If I Do Nothing?

Nothing. If you need EDI codes for rush order or the Supplier Sales Order Number field, you will need to continue the current workaround to get information to the supplier.

Community Link https://doc.workday.com/release-notes/en-us/smorder/7610427.html

Integration - 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, Workday recommends 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

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 - 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

Integration - 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

Integration Retiring Functionalities

These include items beginning their retirement for the first time, items whose retirements have changed, and items that are fully retiring as of Workday 2024R2.

Integration

- Kronos Worker Data Import

Integration - Kronos Worker Data Import

What's Changing

Workday now plans to retire Kronos Worker Data Import - Absence Management DEPRECATED - DO NOT USE integration template

Additional Considerations

Workday replaces the retiring item with Worker Data Import - Absence integration template

What Do I Need To Do?

May impact your training materials. Workday recommends that you start using the new integration template.

What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/abs/600155.html

Learning

Learning Top Features

Cognizant Consultants and Product Leads have prepared the list of top features for this Workday release.

Learning

- Branding for Learning - [S]
- Skills Import for Udemy - [S]
- Virtual Classroom Integration with Zoom - [S]
- Learning Assignments Reporting - [A]
- Internal Learning Assessor Management - [S]
- Enforce Lesson Sequence in a Course - [A]
- Learning Assignments Visible on Learning Content - [A]
- Program Completion Logic - [A]
- Learning Assignments Security Update - [A]

Legend:
[A] - Automatically Available Features
[S] - Setup Based Features

Learning - Branding for Learning

S

What's Changing

With the 2024R2 release, you can now personalize Workday Learning by adding your own banner image and header text to the Learning home page.

This update enables you to create a more personalized and consistent experience, improving recognition and trust among the learners.

Workday adds a new Other tab to the Configure Tenant Branding task to enable you to configure branding rules for the banner image and the header text of the Learning Home. This task is secured to the Set Up: Tenant Setup - System domain in the System functional area.

Additional Considerations

N/A

What Do I Need To Do?

Access the File Type Setup Instructions field in Edit Tenant Setup - System task to review the supported file types and ensure the file formats you would like to use are included.

(Optional) Use the Create Branding Rule task to define condition rules and apply one to each banner. You can set condition rules that determine which image and text display for specific group of users.

Access the Configure Tenant Branding tasks and click Other tab to add the banner image and the header text. You can apply condition rules to them as needed.

What Happens If I Do Nothing?

If you don't add a banner image or header text, learners will see the default text What will you learn today? as the header, with no banner.

Community Link https://doc.workday.com/release-notes/en-us/omsui/7623032.html

Learning - Skills Import for Udemy

S

What's Changing

Workday enables you to import Udemy skills into Workday. Leveraging machine learning, Workday automatically normalizes vendor-defined skills into Workday Skills Cloud skills or maintained skills and applies them to imported content.

Workday runs daily checks to find exact or synonymous matches for unmatched skills, which matches more skills to your learning content.

Additional Considerations

Workday enables you to import up to 25 exact and synonymous skills per piece of content from the external content provider Udemy. You can import the skills using the Import Exact and Synonymous Skills check box on the Configure External Content task. When you select this option, Workday displays an Opt-out of Synonymous Skills check box. This option enables you to exclude synonymous skills from your import.

What Do I Need To Do?

When you have an active account with Udemy and want to import skills, run the Configure External Content task and select the Import Exact and Synonymous Skills check box.

Note: 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?

This is an opt-in integration. If you choose to do nothing, you won't be able to import and view skills tagged against your Udemy content in Workday Learning.

Community Link https://doc.workday.com/release-notes/en-us/ccl/8100152.html

Learning - Skills Import for Udemy (cont.)

S

Additional Considerations

Workday recommends including synonymous skills for the best matching of vendor skills to Workday Skills Cloud or maintained skills.

You can use the View External Skill report to view the imported vendor skills and their mappings to Workday Skills Cloud or maintained skills.

Workday attaches external skills that match an exact or synonymous Workday Skills Cloud skill or maintained skill in your tenant to the imported content and display the Skills Cloud skill or maintained skill in areas such as recommendations, search facets, course details, and worker profiles.

Community Link https://doc.workday.com/release-notes/en-us/ccl/8100152.html

Learning - Virtual Classroom Integration with Zoom

S

What's Changing

With the 2024R2 release, Workday integrate Workday Learning with Zoom to enable you to automatically create Zoom meeting links when scheduling virtual classroom lessons in course offerings.

This will improve the learning admin experience for scheduling virtual classroom lessons and enhance the virtual classroom lessons for your global workforce.

Additional Considerations

Workday add a new Zoom Integration Systems option to the Select Virtual Classroom Integrations prompt in the Edit Tenant Setup - HCM task.

What Do I Need To Do?

Configuration on Zoom and Workday needs to be setup. Information available here: Virtual Classroom Integration with Zoom (workday.com).

What Happens If I Do Nothing?

You'll still be able to manually add links for virtual classroom lessons, but you won't be able to use this integration to automatically generate Zoom meeting links.

Community Link https://doc.workday.com/release-notes/en-us/lrn/7634056.html

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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.

Additional Considerations

The new My Team's Learning Assignments advanced report is secured to the Person Data: Learning domain.

What Do I Need To Do?

Nothing, this feature is automatically available. Managers can access the new report from the global search.

What Happens If I Do Nothing?

N/A

Community Link [Learning Assignments Reporting (workday.com)]

cognizant

Learning - Internal Learning Assessor Management

S

What's Changing

With the 2024R2 release, Workday make it easier to manage internal learning assessors by adding a new business process.

This update gives you the flexibility to control who can manage internal learning assessors.

Additional Considerations

Workday delivers a new Manage Internal Learning Assessor business process type (secured to the Learning Core functional area). This new business process enables you to configure workflows for the Create Internal Learning Assessor and Edit Internal Learning Assessor tasks, such as approval and review steps.

Note: You can only create internal learning assessors when there are no existing internal learning assessor or in progress events for the same worker.

You can configure the Create Internal Learning Assessor and Edit Internal Learning Assessor tasks as initiating actions on this business process.

What Do I Need To Do?

Configure the Manage Internal Learning Assessor business process and review the security policy to confirm that it meets your needs.

What Happens If I Do Nothing?

If you choose to do nothing, you can still create and edit internal learning assessors using the Create Internal Learning Assessor and Edit Internal Learning Assessor tasks. These tasks will now go through the new business process and, as such, will create Internal Learning Assessor events when creating or editing internal learning assessors.

Community Link https://doc.workday.com/release-notes/en-us/lrn/7728711.html

Learning - Internal Learning Assessor Management (cont.)

S

Additional Considerations

For existing customers, Workday delivers conversions that automatically create the Default Definition for the Manage Internal Learning Assessor business process, as well as a copy of the unconstrained security groups from Manage: Create and Edit Learning Roles domain to the initiating actions, and Cancel and View All processing actions of the business process. This provides you with an easy transition when using the new business process, and allows you to continue using the existing Create Internal Learning Assessor and Edit Internal Learning Assessor tasks without interruption.

Workday has also created Creation Events for all the existing internal learning assessors to keep the reporting consistent.

Community Link https://doc.workday.com/release-notes/en-us/lrn/7728711.html

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.

What Do I Need To Do?

This feature is automatically available. You can edit existing courses to enforce lesson order. 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/lm/7379632.html

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Learning – Enforce Lesson Sequence in a Course (cont.)

A

Additional Considerations

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.

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: (1) A new banner; (2) A lock icon with the associated help text to lesson titles.

Finally, Workday updates these web services to enable you to enforce lesson order: (1) Get Blended Course; (2) Get Digital Course; (3) Get Learning Course Offering; (4) Get Learning Courses; (5) Manage Learning Course; (6) Manage Learning Course Offering; (7) Put Blended Course; (8) Put Course Offering; (9) Put Digital Course.

Community Link https://doc.workday.com/release-notes/en-us/lm/7379632.html

cognizant

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

Workday adds a new Assignments tab on the administrator view of Learning Content. The Assignments tab is secured to these domains: (1) Manage: Learning Course Enrollments; (2) Self-Service: Learning Instructor; (3) Setup: Learning Catalog.

Within the Assignments tab, Workday sort the data by Assigned Date, showing Open Assignments first. The assignment data within the Assignments tab is secured to these domains: (1) Manage: Learning Assignments; (2) Person Data: Learning; (3) Reports: Learning Record.

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/lm/7960810.html

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Learning - Learning Assignments Visible on Learning Content (cont.)

A

Additional Considerations

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: (1) Person Data: Learning; (2) 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/lm/7960810.html

cognizant

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 Completionas is selected for all mandatory content items.

Community Link https://doc.workday.com/release-notes/en-us/lm/7819018.html

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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.

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.

Additional Considerations

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/lm/7960813.html

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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/lm/7960813.html

Payroll

Payroll Top Features

Cognizant Consultants and Product Leads have prepared the list of top features for this Workday release.

Payroll

- Object Transporter for Payroll - [A]
- Intelligent Prompt Recommendations for Payroll - [S]
- Retroactive Pay with Different Tax Authorities for On-Cycle Payroll - [S]

Legend:
[A] - Automatically Available Features
[S] - Setup Based Features

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

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

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

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Payroll - Intelligent Prompt Recommendations for Payroll

S

What's Changing

With this release, Workday delivers intelligent prompt recommendations for payroll. This provides you with the option of accessing real-time recommendations for payroll input, off-cycle payments, and pay group assignments. Enabling prompt recommendations helps improve accuracy and efficiency.

Additional Considerations

You can now configure Workday to display machine learning recommendations on the:

- Pay Component and Run Category prompts on these tasks: (1) Add Payroll Input; (2) Add Payroll Input by Result; (3) Add Payroll Input by Worker; (4) Edit Payroll Input
- Pay Component and Reason prompts on these tasks: (1) Run Manual Payment for Worker; (2) Run On Demand Payment for Worker
- Bank Account prompt on the Run Manual Payment for Worker task.
- Proposed Pay Group prompt on the Assign Pay Group task.

Workday displays recommendations based on your most recently used and most frequently used selections on the prompts. .

What Do I Need To Do?

You can enable recommendations for some or all of these prompts by checking the relevant check boxes in the Payroll section on the Maintain Machine Learning Prompt Recommendations task.

What Happens If I Do Nothing?

You won't be able to access recommendations on the prompts.

Community Link https://doc.workday.com/release-notes/en-us/payml/7824146.html

Payroll - Retroactive Pay with Different Tax Authorities for On-Cycle Payroll

S

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. You can now calculate retroactive payroll for pay periods that contain these transaction types, reducing the need for manual calculations and pay input.

Additional Considerations

Workday removes these transaction types from the All Unsupported Payroll Retro Transaction Types report and adds 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

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Payroll Retiring Functionalities

These include items beginning their retirement for the first time, items whose retirements have changed, and items that are fully retiring as of Workday 2024R2.

Payroll

- Maintain Earnings Update ROE Reporting Codes
- Local Payroll Data
- Build Objects for Payroll Interface 2.0
- Allocate Pay Input Across Employment

Payroll - Maintain Earnings Update ROE Reporting Codes

What's Changing

Workday now plans to retire the Maintain Earnings (Update ROE Reporting Codes) (Do Not Use) task.

Additional Considerations

N/A

What Do I Need To Do?

May impact your training materials.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/paywdcan/6451599.html

Payroll - Local Payroll Data

What's Changing

Workday now plans to retire the Local Payroll Data feature.

Additional Considerations

Workday replaces the retiring item with the Additional Payroll Data feature.

What Do I Need To Do?

May impact your training materials.

Workday recommends that you review your current business processes and complete the necessary configurations to start using the new feature and stop using the old one.

What Happens If I Do Nothing?

N/A

Retirement Date

2025-01-03

Community Link https://doc.workday.com/release-notes/en-us/payexternal/7301255.html

Payroll - Build Objects for Payroll Interface 2.0

What's Changing

Workday now plans to retire these tasks:

Build Objects for Payroll Interface 2.0 (Do Not Use)

Create External Payroll Processing Options (Do Not Use)

Create External Payroll Entity (Do Not Use)

Create External Payroll Employee Type (Do Not Use)

Delete Payroll Interface V1 Instances (Do Not Use)

Disable Payroll Interface V1 User Interface (Do Not Use)

Edit External Payroll Processing Options (Do Not Use)

Edit External Payroll Entity (Do Not Use)

Edit External Payroll Employee Type (Do Not Use)

Edit External Pay Group (Do Not Use)

Edit Position Data for Payroll Interface (Do Not Use)

Maintain Calendar for External Pay Group (Do Not Use)

What Do I Need To Do?

Workday recommends you to remove any reference to these steps from your business processes:

- Review Payroll Interface Data
- Review Payroll Interface Data Extract

What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/payexternal/3697039.html

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Payroll - Build Objects for Payroll Interface 2.0 (cont.)

What's Changing

Build Objects for Payroll Interface 2.0 (Do Not Use)
Create External Payroll Processing Options (Do Not Use)
Create External Payroll Entity (Do Not Use)
Create External Payroll Employee Type (Do Not Use)
Delete Payroll Interface V1 Instances (Do Not Use)
Disable Payroll Interface V1 User Interface (Do Not Use)
Edit External Payroll Processing Options (Do Not Use)
Edit External Payroll Entity (Do Not Use)
Edit External Payroll Employee Type (Do Not Use)
Edit External Pay Group (Do Not Use)
Edit Position Data for Payroll Interface (Do Not Use)
Maintain Calendar for External Pay Group (Do Not Use)
Maintain Deductions for External Payroll Entity (Do Not Use)
Maintain Earnings for External Payroll Entity (Do Not Use)
..

Reports:
View External Payroll Processing Options (Do Not Use)
View External Payroll Entity (Do Not Use)
View External Payroll Employee Type (Do Not Use)
View External Pay Group (Do Not Use)
View Positions Included in Payroll Interface Run (Do Not Use)
Review Payroll Interface Data Extract (Do Not Use)
Review Payroll Interface Data (Do Not Use)
Revise Payroll Interface Data (Do Not Use)

Web Services Elements:
Change Job
Edit Position
Hire Employee
Business Process Steps:
Review Payroll Interface Data Extract (Do Not Use)
Review Payroll Interface Data (Do Not Use)
Revise Payroll Interface Data (Do Not Use)

Additional Considerations

Community Link https://doc.workday.com/release-notes/en-us/payexternal/3697039.html

Payroll - Build Objects for Payroll Interface 2.0 (cont.)

Additional Considerations

Workday replaces the retiring items with new tasks and other items for Payroll Effective Change Interface and Payroll Interface.

Community Link

https://doc.workday.com/release-notes/en-us/payexternal/3697039.html

Payroll - Allocate Pay Input Across Employment

What's Changing

Workday now plans to retire the Allocate Pay Input Across Employment (Do Not Use) on the Earning business object.

Additional Considerations

Workday replaces the retiring item with FLSA Amount Allocation Across Coverage Dates on the Earning business object.

What Do I Need To Do?

Replace the old report field in any customer reports with the FLSA Amount Allocation Across Coverage Dates report field.

What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/paywdusa/3490339.html

Platform and Product Extensions

Platform and Product Extension Top Features

Cognizant Consultants and Product Leads have prepared the list of top features for this Workday release.

Platform and Product Extension

- Case Owners Can Reopen Cases - [S]
- Article Translation with AI - [S]
- Create Case Additional Text - [S]
- AI Enhanced Search - [A]
- Additional Text Formatting for Articles - [A]
- Case Satisfaction Surveys - [S]
- Case Validations - [S]
- Case Notification Configuration - [S]

Legend:
[A] - Automatically Available Features
[S] - Setup Based Features

Platform and Product Extensions - Case Owners Can Reopen Cases

S

What's Changing

With this release, you can now provide case owners in your organization the option to reopen their resolved cases from the Workday Help Center if they're dissatisfied with the resolution.

Workday updates the Edit Tenant Setup - Help task (secured to the Setup: Help Case Management domain) by adding a new Enable Case Owners to Reopen Cases field. This field enables case owners to reopen cases closed for less than 7 days in the Help Center. When enabled, it can no longer send a reply without first reopening the case and providing their reason for reopening.

Additional Considerations

On the case view of cases resolved for less than 7 days, Workday adds: (1) A new Reopen Case button for case owners; (2) Text informing case owners of the last day that they can reopen the case.

On the case view of cases resolved for 7 or more days, Workday adds: (1) A new Create New Case button for case owners to receive additional assistance; (2) Text informing case owners they can't reopen cases resolved for 7 or more days.

What Do I Need To Do?

You need to enable the Enable Case Owners to Reopen Cases field in the Reopen Cases section of the Edit Tenant Setup - Help task.

What Happens If I Do Nothing?

If you choose to do nothing, case owners cannot reopen resolved cases. Case owners can still send a reply on a resolved case from the Help Center or by email. Case owners will still rely on case solvers to reopen cases on their behalf.

Community Link https://doc.workday.com/release-notes/en-us/help/8095279.html

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Platform and Product Extensions - Case Owners Can Reopen Cases (cont.)

S

Additional Considerations

When external case owners attempt to reopen a case by email reply, Workday now sends an automated email response informing them that:

- They cannot reopen their resolved cases.
- Their reply was not delivered.
- They can create a new case to receive additional assistance.

Workday adds these report fields to the Case business object (secured to the Help Case Data domain) which you can use in custom reports:

- Case Reopened Reason
- Case Reopened by Case Owner

Community Link https://doc.workday.com/release-notes/en-us/help/8095279.html

Platform and Product Extensions - Article Translation with AI

S

What's Changing

With this release, you can now utilize generative AI to translate article content into a different language.

Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this article on Community.

Workday updates the Edit Tenant Setup - Help task (secured to the Set Up: Help Case Management domain) by adding:

- A new Knowledge Management tab.
- A new Disable AI Article Translation field on the Knowledge Management tab.

In the Help article editor, Workday adds a new:

- Translations icon.
- Translations option in the View menu.
- Translation section.

What Do I Need To Do?

You must opt in to the Knowledge Management Articles category within the People Experience: User Experience Machine Learning Innovation Service to enable the Article Translation with AI feature.

Community Link https://doc.workday.com/release-notes/en-us/help/8096477.html

Platform and Product Extensions - Article Translation with AI (cont.)

S

What's Changing

Using the Translations option or icon, you can access the new Translation section that appears in the side panel of the Help article editor.

In the Translation section, you can use AI to create a translated article version of a published Help article with the new Add Translations button.

Workday enables you to translate your published Help article content to:

- Bulgarian
- Czech
- Danish
- Dutch
- Estonian
- Finnish
- French (Canada)
- French (France)
- German
- Japanese
- Greek
- Hungarian
- Indonesian
- Italian
- Korean
- Latvian
- Norwegian
- Polish
- Portuguese (Brazil)
- Russian
- Simplified Chinese
- Spanish (Neutral)
- Swedish
- Turkish
- Ukrainian

What Do I Need To Do?

To opt in:

1. Access the Maintain Innovation Services and Data Selection Opt-In task.
2. Select People Experience: User Experience Machine Learning and then click OK.
3. Select the Opt In check box for the Knowledge Management Articles category and then click OK.

What Happens If I Do Nothing?

If you choose to do nothing, you will not have access to the Article Translation with AI feature.

Community Link https://doc.workday.com/release-notes/en-us/help/8096477.html

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Platform and Product Extensions - Article Translation with AI (cont.)

S

Additional Considerations

When viewing a published base Help article that has translated article versions in the Help Article workspace or Help article editor, Workday now displays the translated versions in the Translation section on the side panel.

Workday also displays the related published base Help article viewing translated article versions.

Community Link https://doc.workday.com/release-notes/en-us/help/8096477.html

Platform and Product Extensions - Create Case Additional Text

S

What's Changing

With this release, you can now add custom text and a Help article to the Create Case task, enabling you to provide users additional context, instructions, or informative text when they create cases.

Workday updates the Edit Tenant Setup - Help task (secured to the Set Up: Help Case Management domain) by adding these fields that enable you to add custom text and a Help article to the Create Case task:

- Custom Text
- Article

Additional Considerations

N/A

What Do I Need To Do?

Enter custom text and select an existing Help article in the Information Message on Create Case section of the Edit Tenant Setup - Help task. The custom text and Help article will then display for employees creating cases with the Create Case task.

To enable administrators to add a Help article on the Edit Tenant Setup - Help task and employees to view the added Help article on the Create Case task, they both must: (1) Have sufficient access to the domain security policy for the View Help Articles domain; (2) Be in the appropriate article visibility group.

You can only add one Help article to the Create Case task. When selecting an article, you must also enter custom text to provide additional context. The character limit for the custom text field is 280 characters.

What Happens If I Do Nothing?

If you choose to do nothing, your employees will not see any custom text or a Help article on the Create Case task.

Community Link https://doc.workday.com/release-notes/en-us/help/8050125.html

Platform and Product Extensions - 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".

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

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Platform and Product Extensions - AI Enhanced Search (cont.)

A

Additional Considerations

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.

Community Link https://doc.workday.com/release-notes/en-us/pex/7996683.html

cognizant

Platform and Product Extensions - 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

Platform and Product Extensions - Case Satisfaction Surveys

S

What's Changing

With this release, Workday enables you to configure satisfaction surveys for Help cases so that employees can provide feedback on their experience.

The survey questionnaire must have Case selected as the field value for the Type field.

You can add the configuration that you set in the Create Case Satisfaction Survey Configuration task to the Complete Case Satisfaction Survey action step on the Resolve Case business process.

Workday delivers a new high-performance indexed Case Satisfaction Survey Responses report data source (secured to the Help Case Data domain) that you can use to report on survey responses and optionally the corresponding case data.

Workday delivers these new report fields on the Case Satisfaction Survey Response business object (secured to the Help Case Data domain) that you can use to create custom reports for case satisfaction surveys:

- Survey Completed Date
- Survey Date Sent
- Survey Feedback
- Survey Questionnaire Responses
- Survey Rating
- Survey Rating Description
- Survey Recipient
- Case for Satisfaction Survey

Community Link https://doc.workday.com/release-notes/en-us/help/7349382.html

Platform and Product Extensions - Case Satisfaction Surveys (cont.)

S

What's Changing

Workday adds a new Complete Case Satisfaction Survey action step to the Resolve Case business process (secured to the Help functional area). This enables you to easily determine and automate when Workday sends the satisfaction surveys and who receives it.

When adding the Complete Case Satisfaction Survey action step to the Resolve Case business process, you can now set a due date that automatically removes the pending incomplete survey task from My Tasks and case view when it's past the specified date.

Workday delivers these new tasks (secured to the Business Process Administration and Manage: Business Process Definitions domains) that enable you to configure case satisfaction surveys for your organization:

- Create Case Satisfaction Survey Configuration
- Edit Case Satisfaction Survey Configuration
- View Case Satisfaction Survey Configuration

You can use these tasks to:

- Name or rename your survey.
- Modify the survey question to use your defined custom text rather than using the default question.
- Choose whether or not to include a text box for additional feedback.
- Add or remove an additional survey questionnaire.

Community Link https://doc.workday.com/release-notes/en-us/help/7349382.html

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Platform and Product Extensions - Case Satisfaction Surveys (cont.)

S

What's Changing

Workday delivers these new report fields on the Case business object (secured to the Help Case Data domain) that you can use to create custom reports for case satisfaction surveys at the case level and use in business process step conditions to determine when Workday sends a survey:

- Answered Satisfaction Survey
- Satisfaction Survey Sent
- Latest Satisfaction Survey Status
- Satisfaction Survey Response for the Case

Workday delivers these new purgeable data types, enabling you to purge case satisfaction survey response data for active and terminated workers using the Purge Person Data task (secured to Purge Person Data domain in the System functional area):

- Case Satisfaction Survey Responses for Active Workers
- Case Satisfaction Survey Responses for Terminated Workers

Using these new purgeable data types, you can purge these case satisfaction survey fields that potentially contain PII:

- Survey Feedback
- Questionnaire Responses
- Questionnaire Attachments

Community Link https://doc.workday.com/release-notes/en-us/help/7349382.html

Platform and Product Extensions - Case Satisfaction Surveys (cont.)

S

Additional Considerations

- Case satisfaction surveys and questionnaires are separate features with different functionality. Case satisfaction surveys have a standardized rating scale that you can't customize, while questionnaires are completely customizable.
- You can use the new data source, data source filter, and report fields to collect and analyze data from your case satisfaction surveys.
- You can use the new case satisfaction survey action step to automatically cancel and remove pending surveys if they are unanswered after a specified time range.

What Do I Need To Do?

You must configure and customize your case satisfaction survey and then add the Complete Case Satisfaction Survey action step to the Resolve Case business process.

Configuration Notes:

1. Access the Create Case Satisfaction Survey Configuration task and complete the required fields.
2. Access the Edit Business Process Security Policy task and select the Resolve Case business process type. In the Who Can Do Action Steps section, add Employee as Self as a security group.
3. Add the Complete Case Satisfaction Survey Configuration action step to the Resolve Case business process definition and configure the action step to determine who the survey is sent to.
4. On the Resolve Case business process definition, click Configure Complete Case Satisfaction Survey and then select an existing Case Satisfaction Survey Configuration.

Community Link https://doc.workday.com/release-notes/en-us/help/7349382.html

Platform and Product Extensions - Case Satisfaction Surveys (cont.)

S

Additional Considerations

• You can append an optional questionnaire to the survey to capture additional case feedback. Only questionnaire types of Case are available to add to the Case Satisfaction Survey Configuration.

• Workday displays the option for an employee to complete a survey in both their Case view and My Tasks. Employees can view their survey results in the Case view after completing the survey. When an employee completes a survey, Workday removes the Give Feedback call to action from the Case view and removes the related task from My Tasks.

• Workday does not display survey results in the Case Solver view. You can access and share survey results in a custom report using the new Case Satisfaction Survey Responses report data source.

What Do I Need To Do?

Optionally:

Add a due date to the Complete Case Satisfaction Survey action step to automatically cancel unanswered surveys when the due date passes.

Create a step condition to determine when to initiate a survey. For example, you can configure the survey to deliver only if no previous feedback for a case was given or to internal case owners only (excluding external case owners).

Create a step delay to delay when a survey is sent.

What Happens If I Do Nothing?

If you choose to do nothing, case owners will not receive case satisfaction surveys for resolved cases.

Community Link https://doc.workday.com/release-notes/en-us/help/7349382.html

Platform and Product Extensions - Case Validations

S

What's Changing

With this release, you can now create custom validations to require case solvers to complete designated fields before resolving a case. Case validations ensure that case solvers enter the necessary information to successfully resolve a case.

The most common use cases for case validations require case solvers to:

- Assign a case to themselves or another case solver.
- Select at least one case label.
- Leave the most recent comment.
- Select an Add Flag field value.

Additional Considerations

Workday adds a new Case transaction type on the Maintain Custom Validations report (secured to the Set Up: Custom Validations domain) that enables you to create custom case validations with a severity of Critical. Workday evaluates case validations when case solvers attempt to resolve a case.

What Do I Need To Do?

Access the Maintain Custom Validations report, create a new custom validation using the Case transaction type, and then add a condition rule that determines the required fields that case solvers must complete in order to resolve a case.

What Happens If I Do Nothing?

If you choose to do nothing, nothing will happen when case solvers change a case status Resolved.

Community Link https://doc.workday.com/release-notes/en-us/help/8068405.html

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Platform and Product Extensions - Case Validations (cont.)

S

Additional Considerations

When you create a case validation, Workday now displays an error messages to case solvers when they fail to complete required fields, indicating which fields they must complete before resolving a case.

Workday delivers a new Case Comments report field on the Case business object (secured to the Help Case Data domain) and a new Case Comment Author report field on the Case Comment business object (secured to the Reports: Help Case Management domain). You can use these two report fields together to create a calculated field. Using the calculated field in a case validation condition rule, you can require the assigned case solver to leave the most recent comment before resolving the case.

Community Link https://doc.workday.com/release-notes/en-us/help/8068405.html

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Platform and Product Extensions - Case Notification Configuration

S

What's Changing

With this release, you can now configure and target case notifications based on event types and user types, including case owner, case solver and collaborator.

Workday delivers a new Manage Case Notification Recipients task (secured to the Set Up: Help Case Management domain) that enables you to turn on and turn off the case notifications that case owners, case solvers, and collaborators receive.

On the Edit Tenant Setup - Notifications task (secured to the Set Up: Tenant Setup - BP and Notifications domain), Workday adds these notification types on the Help tab:

- Case Creation - Notify Case Solver or Service Team
- Case Service Team Change - Notify Case Solver or Service Team
- Case Sharing - Notify Case Collaborator
- Case Note Tagging - Notify Case Collaborator

Additional Considerations

N/A

What Do I Need To Do?

Access the new Manage Case Notification Recipients task to tailor when case owners, case solvers, and collaborators receive specific notifications.

What Happens If I Do Nothing?

If you choose to do nothing, case owners, case solvers, and collaborators will continue to receive case notifications based on your existing notification configuration.

Community Link https://doc.workday.com/release-notes/en-us/help/8096008.html

Platform and Product Extensions Retiring Functionalities

These include items beginning their retirement for the first time, items whose retirements have changed, and items that are fully retiring as of Workday 2024R2.

Platform and Product Extensions

- User Experience
- Locations & Geographic Attributes
- Business Processes

Platform and Product Extensions - Favorites Worklet

What's Changing

Workday now plans to retire the Favorites worklet.

Additional Considerations

Workday replaces the retiring item with the Favorite Reports and Tasks option that you can select from your profile icon.

What Do I Need To Do?

May impact your training materials.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/uiplatform/7564574.html

Platform and Product Extensions - The Translations Worklet

What's Changing

Workday now plans to retire the Translations worklet.

Additional Considerations

Workday replaces the retiring item with The Translations Hub.

What Do I Need To Do?

Stop using the Translations worklet and use the Translations Hub instead. Tag the new hub as a favorite and update your documentation as needed.

For more information, see Concept: Translations in the Administrator Guide:

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/gblfram/5827270.html

Platform and Product Extensions - Workflow Definition (Do Not Use)

What's Changing

Workday now plans to retire the tasks that initiate Workflow Definition (Do Not Use) report field on the Business Process Definition business object.

Additional Considerations

Workday replaces the retiring item with the tasks that initiate Workflow Definition report field on the Business Process Definition business object.

What Do I Need To Do?

May impact your training materials. Workday recommends you to use the replacement report field in your custom reports.

What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/efcore/6545212.html

Recruiting

Recruiting Top Features

Cognizant Consultants and Product Leads have prepared the list of top features for this Workday release.

Recruiting

- Candidate Home Tasks - [A]
- Job Description Generation on Job Requisitions - [S]
- Pre-Hire Collective Agreement Details Business Process - [S]

Legend:
[A] - Automatically Available Features
[S] - Setup Based Features

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.

This improves the Candidate Home experience and increases efficiency for external candidates completing application 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 supports 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

Recruiting - Job Description Generation on Job Requisitions

S

What's Changing

With the 2024R1 release, Workday delivers Job Description Generation on Job Requisitions, enabling you to quickly create job descriptions using generative artificial intelligence.

Workday uses these data points to generate job descriptions: (1) Company Name; (2) Skills; (3) Job Posting Title

Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement.

Additional Considerations

Workday delivers a new Manage: Machine Learning for Job Descriptions domain (secured to the Staffing functional area)

Generate with AI button

Workday adds a new Generate with AI button on the Job Description field on these tasks, which you can use to create job descriptions using generative artificial intelligence

What Do I Need To Do?

To setup Generative AI for Job Description on Job Descriptions:

1. Access the Innovation Services And Data Selection Opt-In task.
2. On the Innovation Services Opt In tab, select HCM on the Available Services tab.
3. On the Maintain Innovation Services Data Selection Opt In tab, select HCM:HCM Machine Learning GA Features.
4. Select the Opt In check box to enable these categories on the HCM:HCM Machine Learning GA Features tab: (1) Job Requisition Data; (2) Job Posting Data

What Happens If I Do Nothing?

You will not be able to create job descriptions using generative artificial intelligence.

Community Link https://doc.workday.com/release-notes/en-us/hrjobreq/7614702.html

Recruiting - Pre-Hire Collective Agreement Details Business Process

S

What's Changing

Workday now supports defining collective agreements on job requisitions by enabling the Pre-Hire Collective Agreement Details business process to be a subprocess of Job Requisition and Evergreen Requisition business processes.

Additional Considerations

Workday enables the Pre-Hire Collective Agreement Details business process to be a subprocess of these business processes to help specify collective agreements and factors when creating evergreen requisitions and job requisitions:

- Create Evergreen Requisition
- Create Job Requisition
- Edit Evergreen Requisition
- Edit Job Requisition

What Do I Need To Do?

To setup Collective Agreements on Job Requisition:

Access the Business Process: Job Requisition / Evergreen Requisition.

In the Edit Screen, create a new action BP step, select "Initiate Pre-Hire Collective Agreement Details," choose the preferred security group, and click OK.

Navigate to Related Actions > Business Process > View Business Process Template. From the Business Process type, click Related Actions > Business Process > Configure Consolidated Template.

Add a new row to include "Pre-Hire Collective Agreement Details" between the Job Requisition and Requisition Compensation steps, and click OK.

What Happens If I Do Nothing?

You will not be able to define collective agreements on job requisitions.

Community Link https://doc.workday.com/release-notes/en-us/hrglobal/7783273.html

Student

Student Top Features

Cognizant Consultants and Product Leads have prepared the list of top features for this Workday release.

Student

Student Advising

- Academic Requirement Assignments Web Service - [A]
- Academic Progress Limits on View Academic Requirement Configurations - [S]
- Student Transfer Credit Troubleshooting Console - [A]
- Preliminary Transfer Credit Troubleshooting Console - [A]
- Security Domains for Transfer Credit - [A]
- Role-Based Security for Transfer Credit - [A]

Student Core

- Workday Messaging for Workday Student - [S]
- Configurable Fields for Personal Information for Student - [S]
- Student Onboarding Allowed Actions - [S]
- Student Event History - [A]
- REST API for Student Holds - [S]
- Friends and Family for Workday Student - [A]
- Privacy Preferences Reporting - [A]
- Course Tag Categories for Multiple Institutions - [A]
- Academic Unit Reorganization Conflicts - [A]
- Security for Student Workers - [S]

Student Financial Aid

- Maximum and Minimum Pell Grant Amounts - [S]
- Visibility of SAP Appeal Questionnaire Responses - [A]
- Midyear ISIR Progression with Undergraduate and Graduate Levels - [A]
- Packaging for Undergraduate and Graduate Programs in the Same Award Year - [A]
- Cost Item Column on Student Self-Service Tasks - [A]
- Parent PLUS Student Awards - [A]
- Send Back and Rescind SAP Appeals - [S]
- Federal Direct Loan Reconciliation - [S]
- Return of Title IV Reporting - [A]
- Satisfactory Academic Progress (SAP) Data on Student Profiles - [A]
- Satisfactory Academic Progress (SAP) Communication Recipients - [S]
- Mass Cancel Student Awards - [A]

Legend:
[A] - Automatically Available Features
[S] - Setup Based Features

Student Top Features

Cognizant Consultants and Product Leads have prepared the list of top features for this Workday release.

Student

Student Financials

- Aging Receivable Reports with Custom Aging Groups - [A]
- Student Financials Make a Payment Fields for Third-Party Processors - [S]
- Student Payment Application Lock - [A]
- Student Payment Plans - [S]
- Student Financials Account Refresh - [S]
- Student Payment Precedence Charge Item Selection - [A]

Student Records

- Multiple Academic Periods for Saved Schedules - [A]
- Academic Record Notes - [S]
- Grade Event Business Process Notifications - [S]
- Final Grade Publication - [S]
- Course Versions for Student Registrations - [A]
- Registration Appointments for Multiple Institutions - [A]
- View Saved Schedules for Student Registrations - [A]
- Manage Program Completion - [A]

Student Recruiting

- Review Application Page - [A]
- External Student Site Branding Colors - [A]
- Web Services for Invalid External Student Site Accounts - [S]
- External Student Transcript Web Services - [A]
- Inheritance for Academic Policies - [A]
- Publish Admissions Decisions using the Import Student Application Admission Decision Web Service - [S]
- Publish Admission Decisions Immediately using Mass Operation Management - [S]

Legend:
[A] - Automatically Available Features
[S] - Setup Based Features
[R] - Request Professional Services Support

Student Advising

Student Advising - 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

Student Advising - Academic Progress Limits on View Academic Requirement Configurations

S

What's Changing

With this release, Workday enables you to view your configured Academic Progress Limits on the View Academic Requirement Configurations report.

Additional Considerations

On the View Academic Requirement Configurations report, Workday adds:

- A new column labeled Academic Progress Limits, that displays the number of limits configured for the academic requirement.
- A grid title labeled Academic Requirement Configurations.

To view limits configuration details, click the limit number to display the details.

If you haven't configured limits, the Academic Progress Limits column doesn't display.

On the View Academic Requirement Configurations report, Workday removes:

- Academic Policy from the grid label.
- The columns Academic Progress Policy and Academic Progress Display Policy.

What Do I Need To Do?

Configure Academic Progress Limits on the Configure Academic Requirements task.

What Happens If I Do Nothing?

You won't be able to view configured limits on the View Academic Requirement Configurations report.

Community Link https://doc.workday.com/release-notes/en-us/stuadv/7460180.html

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Student Advising - 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

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Student Advising - 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

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Student Advising - 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 rename 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 secure these tasks and reports to the Set Up: Transfer Credit Rules domain instead of Manage: Student Transfer Credit:

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 Advising - Security Domains for Transfer Credit (cont.)

A

Additional Considerations

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

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

Community Link https://doc.workday.com/release-notes/en-us/stuops/7522923.html

Student Advising - 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.

Additional Considerations

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

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 Core

Student Core - Workday Messaging for Workday Student

S

What's Changing

With this release, Workday extends the Workday Messaging SKU to Workday Student. This update provides you with a SMS messaging channel, enabling you to send SMS messages to students.

Workday currently only supports Workday Messaging for users with mobile numbers from the U.S. or Canada.

Note: You might need to take additional steps to enable this feature depending on your organization's subscription agreement. For more information, see this article on Community.

Additional Considerations

You can now view the SMS Compliance section on the Edit Tenant Setup - Notifications task. This section enables you to set up your SMS configurations and Terms and Conditions.

After completing the SMS Compliance section, you can now configure SMS as a notification channel on these Student notification types:

Academic Advising, Admissions, Financial Aid – General, Student Financials, Student Records, Student Recruiting – Marketing, Student Recruiting - Transactional

What Do I Need To Do?

You might need to take additional steps to enable this feature based on your organization's subscription service agreement. To determine your subscription service agreement:

- Select your profile avatar on Community.
- Select Profile.
- On your profile page, select your organization's name, which is beneath your name and next to your job title.
- View your Subscription Service Agreement value.
- If the value is:
- MSA, you must enable this feature through Innovation Services.
- UMSA, this feature is automatically available.

Community Link https://doc.workday.com/release-notes/en-us/stueng/7614490.html

Student Core - Workday Messaging for Workday Student (cont.)

S

Additional Considerations

After configuring the new SMS notification channel, you can send SMS messages to students by selecting the new:

- Compose SMS option on the Send Ad Hoc Engagement task.
- SMS option on the Contact Method prompt on the Create Student Message task.
- SMS option on the Contact Method field on the Create Student Message web service.
- SMS option on the Mass Send Message task. When you review the recipients of the message in the Send To prompt of the Review tab, you can view which recipients have opted in to SMS messaging under the new SMS Opt-in column.

You can only designate messages with a Use For of Plans and Ad Hoc as SMS messages.

You can also add SMS messages to engagement plans.

What Happens If I Do Nothing?

If you don't enable Workday Messaging in your tenant, you will not be able to send SMS messages to students.

Community Link https://doc.workday.com/release-notes/en-us/stueng/7614490.html

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Student Core - Configurable Fields for Personal Information for Student

S

What's Changing

Workday continues to improve your ability to easily and securely collect and manage student personal information data elements.

Additional Considerations

With this release, Workday enables you to report on student Configurable Fields for Personal Information.

Workday delivers these new report fields on the Student business object (secured to the Person Data: Country Specific Section 1 and Self Service: Country Specific Section 1 domains):

- Country Specific Section 1 – Field 1
- Country Specific Section 1 – Field 2
- Country Specific Section 1 – Field 3

Workday delivers these new report fields on the Student business object (secured to the Person Data: Country Specific Section 2 and Self Service: Country Specific Section 2 domains):

- Country Specific Section 2 – Field 1
- Country Specific Section 2 – Field 2
- Country Specific Section 2 – Field 3

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/7932040.html

Student Core - Configurable Fields for Personal Information for Student (cont.)

S

Additional Considerations

Workday delivers these new report fields on the Student business object (secured to the Person Data: Country Specific Section 3 and Self Service: Country Specific Section 3 domains):

- Country Specific Section 3 – Field 1, Country Specific Section 3 – Field 2, Country Specific Section 3 – Field 3

Workday delivers these new report fields on the Student business object (secured to the Person Data: Non Country Specific Section 1 and Self Service: Non Country Specific Section 1 domains):

- Non Country Specific Section 1 – Field 1, Non Country Specific Section 1 – Field 2, Non Country Specific Section 1 – Field 3

Workday delivers these new report fields on the Student business object (secured to the Person Data: Non Country Specific Section 2 and Self Service: Non Country Specific Section 2 domains):

- Non Country Specific Section 2 – Field 1, Non Country Specific Section 2 – Field 2, Non Country Specific Section 2 – Field 3

Workday delivers these new report fields on the Student business object (secured to the Person Data: Non Country Specific Section 3 and Self Service: Non Country Specific Section 3 domains):

- Non Country Specific Section 3 – Field 1, Non Country Specific Section 3 – Field 2, Non Country Specific Section 3 – Field 3

Community Link https://doc.workday.com/release-notes/en-us/stucore/7932040.html

Student Core - Student Onboarding Allowed Actions

S

What's Changing

In this release, Workday continues to improve allowed actions during the student onboarding process.

Additional Considerations

You can now configure the Review My IDs and Change My Name Pronunciation tasks as a step on these business processes:

- Student Onboarding
- Continuing Student Onboarding

Workday also updates the Review My Legal Name task name to Review My Name. The task now includes preferred 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/stucore/7997544.html

Student Core - Student Event History

S

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 Core - REST API for Student Holds

S

What's Changing

With this release, Workday continues to improve the REST API for student holds.

Additional Considerations

Workday now enables you to remove and override student holds using REST API.

Workday updates the Students API in the studentCore v1 REST web service with new POST operations that enable you to remove and override student holds with these endpoints:

- POST/holds/{ID}/overrideHold
- POST/holds/{ID}/removeHold

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/7619438.html

cognizant

Student Core - Friends and Family for Workday Student

A

What's Changing

With this release, Workday continues to improve the student friends and family process.

Additional Considerations

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.

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 Core - 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, 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

Student Core - 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 Core - 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 Core - 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.

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

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Student Core - Academic Unit Reorganization Conflicts (cont.)

A

Additional Considerations

Workday also updates the request parameters and validations for the Put Academic Unit webservice to support this functionality.

View Program of Study Reorganization Conflicts

Workday 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

cognizant

Student Core - Security for Student Workers

S

What's Changing

You can now prevent student workers from approving their own registration withdraw and instructor eligibility business process events.

Additional Considerations

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

• Designate Instructor Eligibility subprocess events related to instructor eligibility (secured to the Student Records functional area)

• Registration Withdraw Event (secured to the Student Records functional area)

What Do I Need To Do?

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

- Select Business Process > Maintain Advanced Routing from the related actions menu of the approval step of the business process.
- Select Exclude Event Subject.

What Happens If I Do Nothing?

- Student workers can continue to complete the Approval step on these business processes when it's for them:
- Designate Instructor Eligibility subprocess events related to instructor eligibility (secured to the Student Records functional area)
- Registration Withdraw Event (secured to the Student Records functional area)

Community Link https://doc.workday.com/release-notes/en-us/stucurr/7792566.html

Student Financial Aid

Student Financial Aid - Maximum and Minimum Pell Grant Amounts

S

What's Changing

With this release, you must now manually enter the maximum and minimum Pell Grant amounts for award years 2025-2026 and later. Previously, Workday set these amounts.

Additional Considerations

Workday delivers these new tasks (secured to the Set Up: Need Packaging domain) that you can use to update and view maximum and minimum Pell Grant amounts by institution for award years 2024-2025 and later.

- Maintain Pell Grant Configuration
- View Pell Grant Configuration

On the new Maintain Pell Grant Configuration task, you must manually enter Pell Grant amounts for award years 2025-2026 and later. On this task Workday also delivers:

- An error message that prevents you from entering a minimum Pell Grant amount that's greater than the maximum Pell Grant amount.
- A warning message that displays if you change the minimum or maximum Pell Grant amount for an award year or delete an existing award year. These updates might affect the grant amount a student receives during packaging.

What Do I Need To Do?

Enter the maximum and minimum Pell Grant amounts on the Maintain Pell Grant Configuration task for each new award year beginning with 2025-2026. After you update the amounts, you must run financial aid packaging to update students who may have already been packaged with previous year maximum and minimum amounts for the 2025-2026 award year.

What Happens If I Do Nothing?

Students won't receive the Pell Grant award and will be packaged incorrectly for the award year.

Community Link https://doc.workday.com/release-notes/en-us/stufad/7471636.html

Student 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

Student 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

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Student 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

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

A

What Do I Need To Do?

N/A

What Happens If I Do Nothing?

N/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.

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

Student 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. Workday releases 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

Student Financial Aid - Send Back and Rescind SAP Appeals

S

What's Changing

Workday enables you to send Satisfactory Academic Progress (SAP) appeals back to students when they submit information incorrectly, giving them a chance to correct their appeal. You can also rescind appeals when students no longer wish to complete the process.

Additional Considerations

Workday delivers a new Revise Satisfactory Academic Progress Appeal task (secured to the Revise Steps domain) that you can add as a step to the Satisfactory Academic Progress Appeal Event business process. This step enables students to revise their appeal when you send it back to them.

Workday adds these new actions to the security policy for the Satisfactory Academic Progress Appeal Event business process:

- Manual Send Back
- Rescind
- Rescind (Web Service)

This enables you to configure who can send SAP appeals back to students and rescind appeals.

What Do I Need To Do?

Add security groups to the new actions on the security policy of the Satisfactory Academic Progress Appeal Event business process:

- Manual Send Back
- Rescind
- Rescind (Web Service)

What Happens If I Do Nothing?

The Satisfactory Academic Progress Appeal Event business process will continue to function the same as it does today.

Community Link https://doc.workday.com/release-notes/en-us/stufad/7808740.html

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Student Financial Aid - Federal Direct Loan Reconciliation

S

What's Changing

You can now import Direct Loan School Account Statement (SAS) files sent from Common Origination and Disbursement (COD). Workday also enables you to view and report on the Direct Loan SAS files so that you can compare your internal loan records to them, identify differences, and resolve any discrepancies.

Additional Considerations

School Account Statement (SAS) Inbound Integration

Workday delivers a new School Account Statement (SAS) Inbound integration template (secured to the Manage: Student Award Reconciliation domain), enabling you to easily load Direct Loan SAS files into Workday.

Workday also provides you with greater control by delivering the Institution integration attribute on the template so that you can load Direct Loan SAS files associated only with the institution you enter. Workday uses the Direct Loan School Code from the COD Routing ID Policies you've configured for the academic unit configurations in your institution to define which files Workday can inbound based on a matching Direct Loan School Code from the file.

What Do I Need To Do?

1. Manage: Student Award Reconciliation Domain Security Policy

Enable and add security groups to your domain security policy.

Note: Members of any security groups you add can view all Direct Loan SAS files in the Academic Unit configuration they have access to.

2. School Account Statement (SAS) Integration

Configure the document retention policy in the integration attributes.

Multi-Institution

Create an integration system for each institution you plan to inbound Direct Loan SAS files for. In the Institution integration attribute, specify a unique institution for each integration system.

Single Institution

Workday automatically populates your institution in the Institution integration attribute.

COD Routing ID Policy

Community Link https://doc.workday.com/release-notes/en-us/stufad/7774316.html

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Student Financial Aid - Federal Direct Loan Reconciliation (cont.)

S

Additional Considerations

Workday permits roles configured only for your institution to launch the integration.

Support for Comma-Delimited SAS Files

For consistency with the COD format, Workday now uses comma-delimited (CSV) Direct Loan SAS files. Workday no longer supports the tab-delimited format for these files.

Student Award Reconciliation Hub

Workday delivers the Student Award Reconciliation Hub, providing you with a centralized location to review award and disbursement details from Direct Loan SAS files to ensure that they match award and disbursement details in Workday.

Workday delivers a new report, Find School Account Statement (SAS) Files (secured to the Manage: Student Award Reconciliation domain), enabling you to easily view the SAS files you import into Workday.

What Do I Need To Do?

Ensure that:

- You have a COD Routing ID policy for an academic unit that's within the institution you've configured on your Integration attribute for your School Account Statement (SAS) Inbound integration.
- The Direct Loan School Code is configured on your COD Routing ID policy so you're able to inbound Direct Loan SAS files with that Direct Loan School Code.

Inbound an SAS File

Inbound an SAS file using your newly configured integration. Once the file's loaded, you can begin reconciliation using the the Student Award Reconciliation Hub.

What Happens If I Do Nothing?

You won't be able to inbound Direct Loan School Account Statement files into Workday.

Community Link https://doc.workday.com/release-notes/en-us/stufad/7774316.html

Student 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

Student 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

Student Financial Aid - Satisfactory Academic Progress (SAP) Communication Recipients

S

What's Changing

With this release, you can now include or exclude certain populations, such as international students or non-degree students, from receiving Satisfactory Academic Progress (SAP) communications.

Additional Considerations

Workday adds a new Communication Options section to the Satisfactory Academic Progress tab on the Create Financial Aid Communication Rule Set task. In this new section, you can specify groups of students to always exclude from SAP communications.

Workday adds a new Communication Options section to the Evaluate Satisfactory Academic Progress task where you can select the populations to include or exclude from SAP communications for that run specifically. This section is available when you select an evaluation type of Official SAP Calculation or Evaluate for Maximum Timeframe. The details you select on this task display on the View Satisfactory Academic Progress Job Run Details report.

Workday delivers a new Has Unsent SAP Communication report field on the Financial Aid Period Record business object (secured to the Public Reporting Items domain) that you can use in custom reports.

What Do I Need To Do?

To always exclude student groups from SAP communications, configure the new options on the Financial Aid Communication rule set.

To exclude student groups from communications for an individual SAP evaluation, define the recipient population when you configure an Official SAP Calculation or Evaluation for Maximum Timeframe run. If the configuration conflicts with a Financial Aid Communication policy, the policy takes precedence.

What Happens If I Do Nothing?

Workday continues to send SAP communications to all students in an SAP evaluation.

Community Link https://doc.workday.com/release-notes/en-us/stufad/7808759.html

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Student 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

Student Financials

Student Financials - 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.

Workday delivers these new matrix reports:

• Subreport - Student Charges by Days Overdue and Subreport - Student Payment Plan Installments by Days Overdue, secured to the Reports: Student Financial Account domain.

• Subreport - Unapplied Payments by Student, secured to the Reports: All Student Payment Transaction Types domain.

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/stufin/6324236.html

Student Financials - Aging Receivable Reports with Custom Aging Groups (cont.)

A

Additional Considerations

You can access these new matrix reports as subreports on the new Student Receivables Aging Summary composite report.

Workday delivers a new Subreport - Detailed Student Charges by Days Overdue matrix report, secured to the Reports: Student Financial Account domain. You can access this new report as a subreport on the new Student Receivables Aging Detail report.

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

Student Financials - Student Financials Make a Payment Fields for Third-Party Processors

S

What's Changing

Workday Student now enables Institutions to optionally hide fields on Make a Payment and Make a Payment as Third Party tasks when the institution is using an external payment processor with a custom integration configured.

Additional Considerations

Workday delivers the new Hide Payment Fields on Make a Payment Fields for External Processor check box on the Student Payment Settings tab of the Configure Student Payment Options task.

When selected, this new check box optionally hides these fields from Student Payment processing:

- Payment Description
- Payment Type
- Payment Amount
- Currency

When your institution selects this new check box and uses both an external payment processor with Workday-delivered integrations, Workday displays these fields until the student or proxy selects the non-Workday payment method.

What Do I Need To Do?

When your institution has a custom integration configured, and isn't using the Workday-delivered integration, you'll need to select the Hide Payment Fields on Make a Payment Fields for External Processor check box on the Configure Student Payment Options task.

What Happens If I Do Nothing?

Your payment processing functionality won't be affected, but students and proxies can experience a less than desirable experience that requires them to add additional information that isn't necessary.

Community Link https://doc.workday.com/release-notes/en-us/stufin/7945819.html

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Student Financials - 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?

Workday automatically delivers this enhancement to all customers.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/stufin/7733912.html

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Student Financials - Student Payment Plans

S

What's Changing

Workday Student Financials continues to develop new and enhanced features to better support your payment plan processing. Workday enables you to now:

- Cancel more than 1 internal payment plan at a time.
- Support payment plans from third-party vendors.

Additional Considerations

New Payment Plan Task for Cancellations

Workday delivers the new Mass Cancel Student Payment Plans task (secured to the Set Up: Student Collections domain) that enables you to cancel 1 or more internal student payment plans.

Workday also delivers the new All Student Payment Plan report field on the Student Institutional Financial Account business object (secured to the Manage: Student Financial Accounts domain) that you can use in your custom reports.

What Do I Need To Do?

You'll need your third-party vendor to provide you with the most up-to-date payment plan information to use the custom integration and external payment plan web services.

What Happens If I Do Nothing?

When you don't use the Payment Plan for Third-Party Vendors feature you may miss future updates and enhancements.

Community Link https://doc.workday.com/release-notes/en-us/stufin/7733927.html

cognizant

Student Financials - Student Payment Plans (cont.)

S

Additional Considerations

External Payment Plans

Workday delivers these new report fields that you can use in your custom reports and add them to the View Student Payment Plan report:

• External Payment Plan Installment Notes on the Student Payment Plan Installments business object (secured to the Student Financials domain).

• And these new report fields on Student Payment Plan business object (secured to the Student Financials domain):

- External Payment Plan Notes
- External Payment Plan Status
- Is External Payment Plan
- Vendor Name

Workday:

• Renames the Transactions section on the Payment Plan report in the Student Financials profile group on student profiles to Payment Plan Details.

• Nows display external payment plans with your payment plans.

New External Payment Plan Web Services

Workday delivers these new web services (secured to the Manage: Student Financial Accounts domain) that enable you to import and manage your external payment plans from third-party vendors:

- Get External Student Payment Plan
- Import External Student Payment Plans

Community Link https://doc.workday.com/release-notes/en-us/stufin/7733927.html

cognizant

Student Financials - Student Financials Account Refresh

S

What's Changing

Workday enables students, proxies, and administrators the ability to:

- See financial account statuses on specific reports and views.
- Refresh the student's account with current charges and waivers.

Workday limits some processing functions during peak processing periods for better performance

Additional Considerations

Workday adds the new Allow Account Refresh Button check box to the new Refresh Accounts Options section of the Maintain Institutional Student Financial Options task.

When you select this new check box and the student financials account has charges and waivers that require processing, Workday displays the new Account Refresh button outside of peak processing periods on these tasks and reports:

For Administrators

Workday adds these new account statuses as appropriate:

- Account Up To Date
- Account Not Up To Date
- Updating

What Do I Need To Do?

Workday delivers this new functionality automatically to existing tenants, and designates peak scheduling periods. This peak period blocks any account refreshing during this time. You can turn off this feature on the Maintain Institutional Student Financial Options task.

New tenants must enable this functionality.

What Happens If I Do Nothing?

For new tenants, your students, third-party proxies, and administrators won't have access to refresh charges and waivers when the Student Financials Account has charges and waivers that need assessing.

Community Link https://doc.workday.com/release-notes/en-us/stufin/8035695.html

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Student Financials - Student Financials Account Refresh (cont.)

S

Additional Considerations

To these task and reports:

- Account Activity Overview Card
- View Student Account Activity
- View Student Financial Account Account
- View Student Financial Account History by Academic Period
- View Student Financial Account History for Payment Plans
- View Student Financial Account Outstanding Charges and Payments
- View Transactions Summary

For Students and Third-Party Proxies

Workday adds the new Account Not Up To Date status to these tasks and reports, when appropriate:

- Account Activity Overview Card
- Make a Payment
- Make a Payment as Third Party
- Student Self-Service: View Due Now Details tab
- View Payment Plans tab
- View Transactions tab
- View Account Activity
- View Account Activity as Third Party
- View Student Account Activity

Workday defines peak processing periods for your tenant as the 5 minutes before and 5 minutes after both the:

- Open Enrollment Start time designated in the Maintain Academic Period Date Controls task.
- Start Time of the Enrollment Appointments set on the Maintain Academic Period Registration Appointments task.

Community Link https://doc.workday.com/release-notes/en-us/stufin/8035695.html

Student Financials - 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 Financials - 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 Records

Student Records - 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.

For consistency, students can also now add course sections offered during nonstandard academic periods to saved schedules configured with either:

- That nonstandard period.
- The 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

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Student Records - Academic Record Notes

S

What's Changing

With this release, Workday gives you the ability to report on all notes linked to an academic record.

Additional Considerations

Workday delivers a new Academic Record Notes report field on the Academic Record business object (secured to the Reports: Student Notes domain) that you can use in custom reports to return student notes on an academic record.

What Do I Need To Do?

Configure custom reports to use the new Academic Record Notes report field.

To use this report field, constrained users will need access to the Segment - Student Note Category & Topics security group type on the Reports: Student Notes domain.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/sturec/7954400.html

Student Records - Grade Event Business Process Notifications

S

What's Changing

Workday improves the functionality for configuring notifications on grade event business processes.

Additional Considerations

Workday updates these business processes so that you can configure notifications for when grades are changed:

- Mass Lapse Student Grades Event
- Student Course Registration Change Grade Event
- Student Course Section Grade Event

On notifications for the Mass Lapse Student Grade Event and Student Course Section Grade Event business processes, you can now use report fields on the Grade Event Reportable business object.

Workday delivers a new Student Related to Grading Event report field on the Grade Event Reportable business object (secured to the Reports: All Grade Events domain) that returns the student of the grading event. You can use this field on grade event business process notifications to specify the student as the recipient.

What Do I Need To Do?

Configure notifications on grade event business processes:

From the related actions menu of the business process, select Business Process > Add Notification.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/sturec/7619494.html

Student Records - Grade Event Business Process Notifications (cont.)

S

Additional Considerations

Workday also delivers these new report fields (secured to the Reports: All Grade Events domain) that you can use on configurable alerts and grade event business process notifications as related instances:

- Grade Event Reportables for Mass Lapse, on the Mass Lapse Student Grades Event business object.
- Grade Event Reportables for Student Course Section, on the Course Section Grade Event business object.

These report fields enable Workday to send a notification from the business process for each grade event and each student.

Note: Workday doesn't currently support condition rules when you configure business process notifications to specify related instances in the Repeat On section.

Community Link https://doc.workday.com/release-notes/en-us/sturec/7619494.html

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Student Records - Final Grade Publication

S

What's Changing

With this release, Workday enables you to define when students can view their final grades. You can now configure the date when Workday displays assigned final grades to students by academic unit and level or by course section. You can also manually publish pending grades by registration or academic record.

Additional Considerations

Final Grade Publication Date Control

Workday adds a new Final Grade Publication date control on these tasks, enabling you to configure the date that Workday displays final grades to students:

- Maintain Academic Period Date Controls
- Maintain Dynamic Course Section Date Controls
- Override Course Section Date Controls

You can use the appropriate task to apply the date control by academic period or course section.

What Do I Need To Do?

Grant users access to the Manage: Final Grades domain to use the new Publish Pending Grade from Student Course Registration task and Import Publish Pending Grades web service.

Update your existing notifications on grade event business processes to send notifications only when pending grades are published as final:

• Create a True/False condition rule using the Is Final Grade report field on the Grade Event Reportable business object.

• Specify this condition rule on the grade event business process notification.

Community Link https://doc.workday.com/release-notes/en-us/sturec/7363514.html

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Student Records - Final Grade Publication (cont.)

S

Additional Considerations

Note: Workday publishes the pending grades as final at 12 am Pacific Time on the Final Grade Publication date, even if you specify an override time on the date control or a default timezone on the Edit Tenant Setup - System task. Example: Users in the Eastern Time Zone will see grades published at 3 am Eastern Time on the Final Grade Publication date.

You can also use these web services to manage the new Final Grade Publication date control:

- Get Academic Period Date Controls
- Put Academic Period Date Controls

Assigning Grades for Later Publication

Workday updates these tasks and web services to support the new Final Grade Publication date control:

- Assign Student Grades
- Assign Student Grades for Student Course Section
- Change Grade for Student
- Import Student Grade Updates
- Submit Grades for Registrations

What Happens If I Do Nothing?

If you don’t take action, Workday will continue to:

- Display final grades to students as soon as the grades are assigned.
- Update Financial Aid class standings when all courses are graded or when the standard end date passes.

Community Link https://doc.workday.com/release-notes/en-us/sturec/7363514.html

Student Records - Final Grade Publication (cont.)

S

Additional Considerations

When you assign final grades using these tasks and web services prior to the Final Grade Publication date, Workday:

- Keeps the course registration status as Registered.
- Publishes only grades with Withdrawn or Incomplete grade category types.
- Doesn't display the final grades on student profiles.

Publishing Final Grades

Workday delivers these new tasks (secured to the Manage: Final Grades domain) that you can use to manually publish assigned final grades before the Final Grade Publication date:

- Find Pending Grades to Publish search report. You can use this report to publish pending grades on academic records for multiple students.
- Import Publish Pending Grades web service.
- Publish Pending Grade from Student Course Registration task. You can use this task to publish the pending grade for an individual registration. To access this task, select Student Course Registration > Publish Pending Grade from the related actions menu of the course registration with a pending grade.

Community Link https://doc.workday.com/release-notes/en-us/sturec/7363514.html

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Student Records - Final Grade Publication (cont.)

S

Additional Considerations

On the Final Grade Publication date at 12 am Pacific Time, or when you manually publish pending grades, Workday:

- Changes the course registration status to Completed.
- Displays the final grades on the Academic History report on the Academics profile group of the student profile.
- Updates units, grade point averages (GPA), and standings to include the registration with the final grade.

Reporting

Workday delivers these new report fields that you can use in custom reports for registrations with pending grades:

- Has Pending Grades on the Academic Record business object (secured to the Manage: Final Grades domain).
- Is Final Grade on the Grade Event Reportable business object (secured to the Public Reporting Items domain).
- Pending Grade on the Student Course Registration business object (secured to the Public Reporting Items domain).

Workday also updates these report fields on the Grade Event Reportable business object to include information about pending grades:

- Final Grade Result
- Grade Note
- Last Date of Attendance
- Proposed Grade
- Student Grading Scheme

Community Link https://doc.workday.com/release-notes/en-us/sturec/7363514.html

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Student Records - Final Grade Publication (cont.)

S

Additional Considerations

Managing Registrations with Pending Grades

Workday prevents administrators and students from dropping or withdrawing from registrations that have pending grades, or editing the grading basis on those registrations. Workday updates the tasks and web services that users use to:

- Edit a student course registration.
- Drop a course.
- Withdraw from a course.
- Swap courses.
- Reassign course registrations.
- Add or change a program of study.
- Request a leave of absence.
- Request an institutional withdrawal.
- Initiate a suspension of a student.
- Initiate a dismissal of a student.

Financial Aid Class Standings

Workday now waits until the Final Grade Publication date to update Financial Aid class standings based on graded courses. When you don't configure that date, Workday continues to update Financial Aid class standings when all courses are graded or when the standard end date passes.

Community Link https://doc.workday.com/release-notes/en-us/sturec/7363514.html

Student Records - 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 Records - 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

cognizant

Student Records - 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

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Student Records - 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 Records - 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 adds 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

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Student Records - 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

Student Records - 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.

Community Link https://doc.workday.com/release-notes/en-us/sturec/7791726.html

Student Recruiting

Student Recruiting - 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

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Student Recruiting - External Student Site Branding Colors

A

What's Changing

Workday now requires branding colors for external student sites.

Additional Considerations

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

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 Recruiting - Web Services for Invalid External Student Site Accounts

S

What's Changing

With this release, Workday delivers web services that enable you to upload and retrieve rules that block or flag student applications from external student site accounts that are associated with Google aliases.

Additional Considerations

Workday delivers these new web services (secured to the Manage: Rules for Invalid External Accounts domain) that enable you to upload and retrieve rules that block or flag student applications from external student site accounts that are associated with Google aliases:

- Get Google Alias Rule.
- Put Google Alias Rule.

What Do I Need To Do?

Configure access to the web services on the Manage: Rules for Invalid External Accounts domain.

What Happens If I Do Nothing?

You won't be able to use web services to manage the Google alias rule for your tenant. You can continue to manage the rule in the browser application.

Community Link https://doc.workday.com/release-notes/en-us/stups/7930586.html

Student Recruiting - 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 Recruiting - 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.

Additional Considerations

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

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

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Student Recruiting - Inheritance for Academic Policies (cont.)

A

Additional Considerations

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.

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

Student Recruiting - Inheritance for Academic Policies (cont.)

A

Additional Considerations

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

Community Link https://doc.workday.com/release-notes/en-us/stups/7443568.html

Student Recruiting - Publish Admissions Decisions using the Import Student Application Admission Decision Web Service

S

What's Changing

Workday enables you to use the Import Student Application Admission Decision web service to publish admission decisions immediately.

Additional Considerations

Workday adds an optional boolean, Set Decisions to Publicly Available, to the header of the web service that enables you to immediately make decisions publicly available for applications included in a single run of the import.

When the job is complete, Workday provides you with a detailed report of the results that include the job runtime, the application details, and the status of the decision at the time of completion.

Workday also provides a new domain, Manage: Admissions Decisions Publication (secured to the Admissions functional area), that you must be granted Put access to in order to access this new functionality.

If you run this operation on a recurring schedule, each run will publish the admissions decisions without additional review.

Workday is not responsible for the misuse of this feature.

What Do I Need To Do?

Enable and configure the new domain Manage: Admissions Decisions Publication to grant access to the new functionality. Add security groups to the Put integration permissions on this domain as needed and activate all pending security policy changes.

What Happens If I Do Nothing?

The Import Student Application Admission Decision web service will continue to work as before.

Community Link

https://doc.workday.com/release-notes/en-us/stups/7552646.html

Student Recruiting - Publish Admission Decisions Immediately using Mass Operation Management

S

What's Changing

Workday enhances the mass operation type of Finalize Decisions for Student Applications to enable you to make admissions decisions for applicants on the input report publicly available immediately.

Additional Considerations

Workday provides a new Set Decisions to Publicly Available checkbox on the Mass Operation Management task for mass operation type Finalize Decisions for Student Applications that enables you to bypass all manual review and approval steps of the Publish Application Grouping business process and make admissions decisions publicly available to applicants on the input report immediately.

Workday provides a new domain, Manage: Admissions Decisions Publication (secured to the Admissions functional area), that you must be granted Modify access to access this functionality. If you don't have modify access on the domain, the checkbox is disabled.

If you run this operation on a recurring schedule, each run will publish the admissions decisions without additional review.

Workday is not responsible for the misuse of this feature.

What Do I Need To Do?

Enable the new domain Manage: Admissions Decisions Publication to grant access to the new functionality. Add security groups to the Modify permissions on this domain as needed and activate all pending security policy changes.

What Happens If I Do Nothing?

The Finalize Decisions for Student Applications mass operation type will continue to work as before, but the Set Decisions to Publicly Available checkbox will not be enabled.

Community Link https://doc.workday.com/release-notes/en-us/stups/7552656.html

Student Retiring Functionalities

These include items beginning their retirement for the first time, items whose retirements have changed, and items that are fully retiring as of Workday 2024R2.

Student

- 1042-S Charge Item Classification Report Field
- Transfer Grade Report Field
- Academic Period Record Report Field
- Class Standing Definition (Do Not Use) Report Field on Student Object

Student - 1042-S Charge Item Classification Report Field

What's Changing

Workday now plans to retire the 1042-S Charge Item Classification.

Additional Considerations

N/A

What Do I Need To Do?

May impact your training materials.

What Happens If I Do Nothing?

N/A

Retirement Date

2025-02-01

Community Link https://doc.workday.com/release-notes/en-us/stufin/6423590.html

Student - Transfer Grade Report Field

What's Changing

Workday now plans to retire this task and report:

- Edit Acceptable Transfer Grade (Do Not Use)
- View Acceptable Transfer Grade (Do Not Use)

Additional Considerations

Workday plans to retire the item with the Maintain Institutional Transfer Credit Policy task.

What Do I Need To Do?

May impact your training materials.

What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/stuops/6751685.html

Student - Academic Period Record Report Field

What's Changing

Workday now plans to retire these report fields on the Academic Period Record business object:

- Period GPA: Institutional (Do Not Use)
- Cumulative GPA: Institutional (Do Not Use)

Additional Considerations

Workday replaces the retiring item with these report fields on the Academic Period Record business object:

- Academic Period GPA
- Cumulative GPA

What Do I Need To Do?

May impact your training materials and require additional testing.

Workday recommends that you replace the old report fields on any custom reports or integrations and begin using the new report fields.

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What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/sturec/6711097.html

Student - Class Standing Definition (Do Not Use) Report Field on Student Object

What's Changing

Workday now plans to retire Class Standing Definition (Do Not Use) report field on the Student business object.

Additional Considerations

Workday replaces the retiring item with the Latest Class Standing report field on the Academic Record business object.

What Do I Need To Do?

May impact your training materials and require additional testing. Workday recommends that you replace the old report field on any custom reports or integrations and begin using the new report field. .

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/sturec/6306643.html

Talent

Talent Top Features

Cognizant Consultants and Product Leads have prepared the list of top features for this Workday release.

Talent

- Development Item Experience in Career Hub with Suggestions - [S]
- Development Items, Skills, and Mobile - [S]
- Career Path Builder Seniority Filtering - [S]
- Development Items on Workers REST API - [S]
- Career Hub Explore and Career Path Builder Skills and Skill Interests Matching - [A]
- Goals User Experience Redesign for Mobile - [A]
- Goals User Experience Redesign Multi-Management of Goals - [S]
- Organizational Goals Configuration - [A]
- Skill Assessments - [S]
- Suggested Skills for Workers - [A]

Legend:
[A] - Automatically Available Features
[S] - Setup Based Features

Talent - Development Item Experience in Career Hub with Suggestions

S

What's Changing

With this release, Workday delivers a new development item user experience in Career Hub.

The dynamic experience enables workers to clearly create, edit, and complete their development items in the context of Career Hub.

Additional Considerations

Flex team and learning suggestions surface on the Related Opportunities for Plan card. Opportunities are suggested based on comparison between the Skills to Develop on the development item, and the skills on the flex team or learning opportunity. Workers can save the suggestions to their Career Hub Plan. Additional suggestions appear to replace those saved to Plan.

A new action button card enables workers to edit, complete, or delete their development item. The edit action surfaces a pop-up window enabling workers to update the various development item attributes.

The Status Notes section is prominently displayed on the new page, encouraging workers to document their progress. Workers can also update their status notes when editing the development item. Status notes are visible on the Status Notes tab.

What Do I Need To Do?

You might need to take additional steps to enable this feature based on your organization's subscription service agreement. To determine your subscription service agreement:

1. Select your profile avatar on Community.

2. Select Profile.

3. On your profile page, select your organization's name, which is beneath your name and next to your job title.

4. View your Subscription Service Agreement value.

If the value is:

- MSA, you must enable this feature through Innovation Services.
- UMSA, this feature is automatically available.

Community Link https://doc.workday.com/release-notes/en-us/taladv/7790926.html

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Talent - Development Item Experience in Career Hub with Suggestions (cont.)

S

Additional Considerations

An Additional Details tab displays the Last Updated By, Last Updated, and Created By attributes.

Users can still access and manage their development items via the "Manage in Career Hub" button on the Development Items section of the Career Profile for Worker Profile Group.

Users updating skills on their Development Item outside of Career Hub, will still see their skills interests automatically appear in Career Hub.

What Do I Need To Do?

Access to Career Hub is secured to the Self-Service: Career Hub domain.

Workday secures access to the new View Development Item page on the Self-Service: Development Items domain. The ability to delete development items is secured to the Self-Service: Delete Development Item domain.

Workday secures access to the learning suggestions on the Related Opportunities for Plan card to the Learning Access domain.

Workday secures access to the flex team suggestions on the Related Opportunities for Plan card to the Flex Teams domain.

What Happens If I Do Nothing?

Users who access development items in Career Hub today will automatically see this new user experience.

Community Link https://doc.workday.com/release-notes/en-us/taladv/7790926.html

Talent - Development Items, Skills, and Mobile

S

What's Changing

With this release, Workday enables users to add skills to their development items. Additionally, Workday makes development items available for the Workday native app on Android, iPad, and iPhone.

These enhancements provide additional options for users to actively track their skills development, from their desktop or mobile devices, further enabling their career aspirations.

Additional Considerations

Workday adds a new Skills to Develop class report field, on the Development Item business object, secured to these domains:

- Self-Service: Development Items
- Talent Review: Development Items
- Worker Data: Development Items

Workday limits the field to 3 skills on each development item.

What Do I Need To Do?

You might need to take additional steps to enable this feature based on your organization's subscription service agreement. To determine your subscription service agreement:

1. Select your profile avatar on Community.

2. Select Profile.

3. On your profile page, select your organization's name, which is beneath your name and next to your job title.

4. View your Subscription Service Agreement value.

If the value is:

- MSA, you must enable this feature through Innovation Services.
- UMSA, this feature is automatically available.

Community Link https://doc.workday.com/release-notes/en-us/taladv/7791808.html

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Talent - Development Items, Skills, and Mobile (cont.)

S

Additional Considerations

Skills added to the Skills to Develop field are automatically added as skill interests to the worker profile. The skill interests on the worker's Career Hub profile are also updated. The skills remain on the development item if the worker chooses to remove them as skill interests. Additionally, the skills remain as skill interests if the worker chooses to remove them from the development item. Workday adds the Job Profile Skills, Skill Categories, and Skill Interests for Worker as prompts for the Skills to Develop field.

The Skills to Develop field allows you to report on the skills tagged to development items in both custom and delivered reports. Workday adds the field to these existing reports:

- All Workers' Development Items Changed in the Last Week
- My Development Items Changed in the Last Week (Include Delete and Not Applicable)
- My Team's Development Items Changed in the Last Week (Include Delete and Not Applicable)

Workday updates the Print PDF and Excel outputs for development items to include the Skills to Develop, Category, Start Date, Completion Date, and Status Note fields..

What Do I Need To Do?

Add skills to public job profiles for employees to see Job Profile Skills populated in their Skills to Develop prompt in development items.

Configure permissions on the following domains as needed by your organization:

- Self-Service: Development Items
- Talent Review: Development Items
- Worker Data: Development Items
- Self-Service: Interests
- Worker Data: Interests

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/taladv/7791808.html

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Talent - Development Items, Skills, and Mobile (cont.)

S

Additional Consideration

Ensure your tenants are using Skills in order for this feature to be applicable in the Development Items, domains and subsequent reports & features. Customers will need to leverage Skills Cloud if using the Automatic Skills Interests assignments in Career Hub.

If customers add skills to job profiles for employees to see Job Profile Skills populated in their Skills to Develop prompt in development items, they must ensure that those Job Profiles are public. Only 3 skills can be added to each development item. The design is intentional for an optimal end user experience.

At this time, you can report on the Skills to Develop that have been added to development items. Customers can track the Last Updated By field on the development item, but it will not specifically differentiate skills versus other fields that were edited.

Community Link https://doc.workday.com/release-notes/en-us/taladv/7791808.html

Talent - Career Path Builder Seniority Filtering

S

What's Changing

With the 2024R2 release, Workday makes improvements to the quality of suggested job profiles in the Career Path Builder.

By default, the Career Path Builder does not limit moves based on seniority for workers, resulting in potentially jarring career pathing experiences where users see career steps that are multiple levels above or below their current role. This is because by default, hierarchies are not used to limit potential next moves for an employee.

Enabling filtering on career leveling fields for seniority makes career discovery smoother, by eliminating the disjointed experience of showing immediate moves that seem too far beyond the worker's current role.

Additional Considerations

In the existing Maintain Career Hub and Opportunity Marketplace task, on the Edit Explore Preferences tab, Workday delivers additional Career Path Builder Preferences configuration options.

When administrators select the Customized Career Path Builder Source Configuration option, new Hierarchy and Order attributes surface.

What Do I Need To Do?

You might need to take additional steps to enable this feature based on your organization's subscription service agreement. To determine your subscription service agreement:

1. Select your profile avatar on Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- MSA, you must enable this feature through Innovation Services.
- UMSA, this feature is automatically available.

Community Link https://doc.workday.com/release-notes/en-us/taladv/7790954.html

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Talent - Career Path Builder Seniority Filtering (cont.)

S

Additional Considerations

Select the Hierarchy option to apply seniority constraints on job profile recommendations provided to workers. You can use Job Level or Management Level options to override the default option Default (ML Generated), which does not limit job profile results by levels.

If you opt into either the Job Level or Management Level options, you must specify the Order of the level to be ascending or descending, in accordance with your hierarchy direction.

When workers select the Skill or Skill Interests sources in the Career Path Builder, career steps shown will display job profile suggestions that are within 1 level above or below the worker's current role.

What Do I Need To Do?

Workday secures access to the Maintain Career Hub and Opportunity Marketplace task to the Set Up: Career Hub and Opportunity Marketplace domain.

Access to Career Path Builder is secured to the Self-Service: Career Hub Job Profiles domain.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/taladv/7790954.html

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Talent - Development Items on Workers REST API

S

What's Changing

With the 2024R2 release, Workday updates the Workers API in the Performance Enablement v5 REST web service, enabling users to retrieve and delete development items for themselves and, with applicable permissions, for others.

Additional Considerations

The new Development Items REST API enables users to:

- Get a collection of development items for a specific worker.
- Get a specific instance of development item for a specific worker.
- Delete their development item.
- Delete a development item for a specific worker.

You will need to configure the security needed on domains that reference the new REST API for Development items.

What Do I Need To Do?

Configure permissions on the applicable domains:

- Self-Service: Delete Development Item
- Self-Service: Development Items
- Worker Data: Delete Development Item
- Worker Data: Development Items

What Happens If I Do Nothing?

You'll see no changes in Workday if you don't enable this feature.

Community Link https://doc.workday.com/release-notes/en-us/taladv/7712941.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 - 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.

Users can now access the card framework included in the Goals Redesign User Interface feature from your mobile device.

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 - Goals User Experience Redesign Multi-Management of Goals

S

What's Changing

Workday continues to enhance the Goals User Experience Redesign feature by providing the ability to create, delete, edit, review, and approve multiple goals at once. These changes only apply if you've opted in to the Goals User Experience Redesign Changes feature in the Maintain Feature Opt-Ins task. Provides the ability to do bulk updates on multiple goals.

Additional Considerations

Workday delivers a new Individual Goals task for multiple goals as an initiating action on the Manage Goals business process security policy. Access the task as a pop-up modal from the new Manage Goals button for these reports:

- My Goals
- View Goals
- View Goals for Worker on the worker profile.

For users with access to the Individual Goals and Archive Goals initiating actions on the Manage Goals business process security policy, Workday provides a Bulk Update button.

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.

1. Access the Manage Goals business process security policy to enable the multi-management of goals.
2. Identify which security groups you wish to have access to manage multiple goals at once using the My Goals or View Goals for Workers reports.
3. Add the security groups to the new Individual Goals initiating action.

Community Link https://doc.workday.com/release-notes/en-us/hrperf/8097568.html

Talent - Goals User Experience Redesign Multi-Management of Goals (cont.)

S

Additional Considerations

The Bulk Update button provides a drop-down to access Manage Goals and Archive or Unarchive Goals tasks on these reports:

- My Goals
- View Goals
- View Goals for Worker on the worker profile.

If 2 or more goals are added or edited in bulk, these will appear in the Review Goals step of the Manage Goals business process to review and approve in My Tasks.

If you are only adding or editing 1 goal within the bulk process, a slide out will appear from the side panel, to review and approve the content.

What Do I Need To Do?

4. When navigating to the My Goals or View Goals for Worker reports, these users will now see the new Manage Goals button or the drop-down Bulk Updates button.
5. To access the Bulk Updates button, the user must have access to both the Individual Goals and Archive Goals initiating actions. The Bulk Updates button also allows users to manage multiple goals at once

What Happens If I Do Nothing?

If you choose to do nothing, you won't have the ability to manage multiple goals at once using the new Goals User Experience Redesign feature.

Community Link https://doc.workday.com/release-notes/en-us/hrperf/8097568.html

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.

Customize the organizational goal experience.

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 - Skill Assessments

S

What's Changing

Workday now supports structured skill assessments by enabling assessors to rate worker profile skills, job profile skills, and other skills for workers.

Reporting on skill assessments can help inform your workforce planning and strategic talent initiatives.

Worker skill assessments and self-assessments can facilitate better career growth conversations between workers and managers.

Additional Considerations

Workday delivers a new Assess Skills business process (secured to the Worker Profile and Skills functional area) that facilitates structured skill assessments for workers. Managers and other assessors can rate workers' job profile skills, worker profile skills, and other skills on a 1-5 proficiency scale. Note that the Assess Skills business process doesn't support crowdsourced skills.

You can configure these new tasks as initiating actions on the Assess Skills business process:

- Assess Skills: Access this task from Global Search and select the worker you want to assess.
- Assess Skills for Worker: Access this task from the Related Actions menu on the worker's profile.

What Do I Need To Do?

Before you can use this feature, you must set up:

- Skills Cloud.
- Security domains for business process administrators.
- Security on the Person Data: Skill Assessment Data and Self-Service: Skill Assessment Data domains to enable reporting on skill assessment data.
- The Assess My Skills task as an allowed action on the Assess Skills business process.
- The Assess Skills business process definition using the Create Business Process Definition (Default Definition) task.

Community Link https://doc.workday.com/release-notes/en-us/skills/7864453.html

Talent - Skill Assessments (cont.)

S

Additional Considerations

You can also configure the new Assess My Skills task as an allowed action to enable workers to rate their own skills.

To secure skill assessment data, Workday delivers these new domains in the Worker Profile and Skills functional area:

- Person Data: Skill Assessment Data
- Self-Service: Skill Assessment Data

You can now report on all Assess Skills business process events using these new report fields, secured to the domains listed above:

- Assessed Skills
- Self-Assessed Skills
- Skills Assessed by Trusted Person
- Skills Selected to Assess
- Skills to Add to Worker Profile

What Do I Need To Do?

To report on skill assessments, you can build custom reports for individual workers and use the Assess Skills Events For Worker field to include Assess Skills events.

What Happens If I Do Nothing?

If you do nothing, you can't use the Assess Skills business process to conduct skill assessments.

Community Link https://doc.workday.com/release-notes/en-us/skills/7864453.html

Talent - Skill Assessments (cont.)

S

Additional Considerations

Workday updates these existing report fields to now include skill ratings from Assess Skills events:

- Skill Rating Source
- Skill Ratings for Worker

Workday adds a new Assess Skill Events For Worker report field on the Worker business object, secured to the same domains.

Workday also supports embedded analytics by delivering a new Assess Skill Embedded BI Data business object with these new report fields:

- Job Profile
- Worker

Consultants will need to configure the Business Process Security Policy, and the business process definition for Assess Skills manually in implementation tenants until these are established in WDSETUP.

Please note that the Assess Skills feature is separate functionality from the Skills Ratings in Feedback for Talent.

Assess Skills is not available for OX 2.0.

Community Link https://doc.workday.com/release-notes/en-us/skills/7864453.html

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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.

This can:

- Increase the quantity and quality of skills on worker profiles, facilitating better career insight and mobility.
- Reduce friction and increase user confidence with Skills Cloud.

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

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

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Talent - Suggested Skills for Workers (cont.)

A

Additional Considerations

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.

Community Link https://doc.workday.com/release-notes/en-us/skills/8108412.html

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Talent Retiring Functionalities

These include items beginning their retirement for the first time, items whose retirements have changed, and items that are fully retiring as of Workday 2024R2.

Talent

- Talent Review Documents and Talent Workers Report Data Sources
- My Application and My Job Applications Reports

Talent - Talent Review Documents and Talent Workers Report Data Sources

What's Changing

Workday plans to retire these report data sources (RDSs):

- Talent Review Documents (Do Not Use)
- Workers from Talent Workers (Do Not Use)

Additional Considerations

Workday replaces the retiring items with these RDSs:

- Workers for Talent Card for Worker Printing Run
- Talent Review Documents for Talent Card for Review Printing Run

What Do I Need To Do?

May impact your training materials.

What Happens If I Do Nothing?

N/A

Retirement Date

2025-02-08

Community Link https://doc.workday.com/release-notes/en-us/talpro/934208.html

Talent - My Application and My Job Applications Reports

What's Changing

Workday now plans to retire My Application and My Job Applications reports.

Additional Considerations

Workday replaces the retiring item with the My Applications report.

What Do I Need To Do?

Workday recommends that you stop using the old reports and use the new report.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/hrrec/5710991.html

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Workforce Management

Workforce Management Top Features

Cognizant Consultants and Product Leads have prepared the list of top features for this Workday release.

Workforce Management

- Web services of Accrual, Time Off and Leave - [S]
- Bulk Prorate Accruals - [S]
- Accrual Expiration - [S]
- Leave Balance Deduction Override - [S]
- Absence Reporting on Time Off Entry and Time Off Event Business Objects - [A]
- Published Scheduled Hours for Calendar Day Calculation - [S]
- Leave Units Proration Based on Percentage - [S]
- Buy Time Off - [S]
- Enter Time by Period - [S]
- Automatically Submit Time - [S]
- Effective Date Support for Midweek Changes in Time Calculations - [S]

Legend:
[A] - Automatically Available Features
[S] - Setup Based Features

Workforce Management - Bulk Prorate Accruals

S

What's Changing

Workday enables you to configure your staffing business processes to automatically bulk prorate accruals for workers in response to job and collective agreement changes.

Workday adds a new Bulk Automated Accrual Adjustment service step that you can configure on these business processes after the completion step:

- Assign Employee Collective Agreement
- Change Job
- End Collective Agreement Assignment

When workers have collective agreement or change job events that impact their accrual entitlements, the Bulk Automated Accrual Adjustment service step updates the Bulk Absence Proration background job to prorate accruals for impacting events. The step creates automated adjustments in bulk for all eligible workers if the accrual is configured as:

  - Based on As of Date (for mid-period accruals).
  - Front-Loaded.

What Do I Need To Do?

Access the existing Evaluate and Correct Ineligible Future Time Off Entries task to run a background job immediately that initiates evaluation and processing of accrual proration. From this point onwards, Workday initiates the background job automatically every 15 minutes.

What Happens If I Do Nothing?

You can continue to use the existing Automated Accrual Adjustment service step in your business processes.

Community Link https://doc.workday.com/release-notes/en-us/abs/7762389.html

Workforce Management - Bulk Prorate Accruals (cont.)

S

Additional Considerations

Workday plans to rename this task to Evaluate and Process Events Impacting Absence in a later update to better reflect that this task now triggers the schedule to initiate the background jobs for evaluating time off entries and accrual eligibility in response to business process events impacting Absence.

Community Link

https://doc.workday.com/release-notes/en-us/abs/7762389.html

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Workforce Management - Accrual Expiration

S

What's Changing

With the introduction of Accrual Expiration, you have the ability to configure expiration on accruals so that time off can expire relative to the date that it was accrued.

Accrual Set Up

Workday introduces a new section on the Time Off Plan Overrides tab of the accrual called Expiration Override. To setup accrual expiration, define:

- Amount of Time Before Expiration
- Unit of Time Before Expiration

You also have the option to select Include Prior Balance Period Accruals in Upper Limit Calculation. Select this if expiring accruals should be included in the time off plan balance upper limit calculations across balance periods.

Note: When requesting time off, Workday will exhaust the units with the soonest expiration date first.

New Calculation

Workday also introduces a new instance value calculation (IVC), Approved Calculated Time for Day for Accrual. This calculation can be used on its own or within arithmetic calculations to accrue units from time tracking relative to the (calculated) day in which they are worked. It ignores accrual frequency method and causes the accrual to trigger on the day that the approved calculated time exists. To use this IVC, you must define an expiration on the accrual.

Community Link https://doc.workday.com/release-notes/en-us/abs/7517573.html

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Workforce Management - Accrual Expiration (cont.)

S

What's Changing

Maintain Accrual and Time Off Adjustments/Overrides

You can now modify reference dates when processing adjustments for expiring accruals in the UI. The reference date selected will determine when that accrual adjustment is granted, regardless of the accrual frequency method defined.

Override Accrual Expiration

Workday has created the new Maintain Accrual Expiration Overrides Task that allows you to override expiration rules defined on an accrual for a worker.

Reporting

Workday has added a new column, Expiring Accruals Forfeited in Period, to all standard time off balance reports. This column will only appear if expiring accruals are configured for a time off plan.

Note: The existing Accrual Forfeited in Period/Year to Date fields will only reflect accrued time off forfeited in excess of an upper limit. Accruals that have expired will never be represented as part of this existing field.

The new self-service My Expiring Accruals report returns all accrual expiration events where the units to expire are greater than 0 as of today. By displaying accrual expiration details in one place, you can review expiration details and help inform your decision around the type of time off to take and ultimately take action (Request Absence) from a single page. This report can be accessed by search, worklet, or PEX Card.

Note: The Request Absence button will only appear for customers using the new Absence Calendar Experience.

Community Link https://doc.workday.com/release-notes/en-us/abs/7517573.html

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Workforce Management - Accrual Expiration (cont.)

S

What's Changing

Workday has created a new PEX homecard called Expiring Accruals. Once published, this will display on a worker's homepage if they have upcoming accrual expiration events within the next 30 days with balances remaining as of the accrual expiration date. Selecting the Review button on the PEX card will open the My Expiring Accruals report. You also have the option to customize the title and subtitle of this card to meet the needs of your organization.

The new Accrual Expiration Event business object links from worker and position business objects via the Expiring Accruals for Worker and Expiring Accruals for Position fields and allows reports to return:

- Expiring Accrual
- Time Off Plan for Expiring Accrual
- Accrual Date
- Expiration Date
- Accrual Expiration Override
- Expiring Accrual Balance for Worker
- Expiring Accrual Balance for Position

Community Link https://doc.workday.com/release-notes/en-us/abs/7517573.html

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Workforce Management - Accrual Expiration (cont.)

S

What's Changing

These report fields are secured so that they can be used in alert notifications. Workday has also added the Accrual Expiration Forfeited (for Time Off Plan) in Period as of Date report field to the Time Off Plan business object that returns the accrual expiration forfeited for all Accruals for the Time Off Plan for the period through the as of date.

Additional Considerations

N/A

What Do I Need To Do?

Edit existing accrual or create a new accrual and define expiration details.

If you are editing an existing accrual in your tenant to uptake accrual expiration, you need effective date your changes. Effective date used should be of the current or a future period.

Optionally, you can update accrual calculations to use the new instance value calculation Approved Calculated Time for Day for Accrual and remove time off plan carryover expiration rules (by setting amount of time before expiration field to 0) if no longer applicable.

What Happens If I Do Nothing?

You will not see any changes to time off balances or the new Expiring Accruals Forfeited in Period column when running existing standard time off reports.

My Expiring Accruals report will still be searchable in the tenant, but can be hidden for all workers using the Hide Workday Delivered Report task.

Community Link https://doc.workday.com/release-notes/en-us/abs/7517573.html

Workforce Management - Leave Balance Deduction Override

S

What's Changing

With this release, Workday enables you to configure leave types to allow workers to take twice the amount of leave by deducting from a leave balance at half the rate.

Workday adds a new Leave Balance Deduction Override check box on the Balance/Leave Taken tab of the Create Leave Type and Edit Leave Type tasks. This override enables you to allow leave to be taken at double the duration while deducting from the leave balance at half of the rate.

Workday adds a new report field, Leave Balance Deduction Override on these business objects:

- Leave Type, (secured to the Set Up: Leave of Absence domain) enabling you to report on if a leave type is configured to allow for leave of absence requests to be double the duration while deducting at half the rate from the leave balance.
- Leave of Absence Event, (secured to the Public Reporting Items domain) enabling you to report on if a worker has leaves of absence that have Leave Balance Deduction Override enabled.

You can use these report fields in business process validations and custom reports.

Workday also adds a new column, Leave Balance Deduction Override to the All Leave Families report, to show if a leave type has leave balance deduction override enabled.

What Do I Need To Do?

Use the Create Leave Type task or the Edit Leave Type task to enable Leave Balance Deduction Override on a leave type.

Select at least one Additional Leave Type that uses the same units as the parent leave type. Ensure that the additional leave type doesn't track balances.

What Happens If I Do Nothing?

N/A

Community Link https://doc.workday.com/release-notes/en-us/abs/7955038.html

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Workforce Management - Leave Balance Deduction Override (cont.)

S

What's Changing

Workday updates the calculations on the Request Absence task, so that workers can see the available and remaining leave balances that they can make a request against at the override rate, based on the leave type selected. The amount of leave balance at the leave balance deduction override rate is displayed as Available Balance, which is double the entitlement. The amount, minus the quantity of the leave request, is displayed as Remaining Balance.

Workday updates the calculation logic to consider leave balance deduction overrides on these report fields on the Leave Type business object:

- Leave Type Balance
- Leave Type Balance for Worker

Workday updates the calculation logic to consider leave balance deduction overrides on these report fields on the Coordinated Leave/Time Off business object:

- Outstanding Leave Balance for Leave Type this Balance Year (Prior to Current Leave)
- Sufficient Balance Exists for Leave or Time Off Request
- Available Balance Exists for Leave or Time Off Request

Community Link https://doc.workday.com/release-notes/en-us/abs/7955038.html

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Workforce Management - Leave Balance Deduction Override (cont.)

S

Additional Considerations

Position based leaves are supported. The main leave type and the additional leave type must both be configured for position based leaves to enable Leave Balance Deduction Override.

Entitlement Per Event isn't supported.

If you update an existing leave type, all previous leave requests of this type will be retroactively updated.

Community Link https://doc.workday.com/release-notes/en-us/abs/7955038.html

cognizant

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

cognizant

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.

Community Link https://doc.workday.com/release-notes/en-us/abs/7986003.html

Workforce Management - Published Scheduled Hours for Calendar Day Calculation

S

What's Changing

Workday enables you to get the total published scheduled hours for your workers for a specific day and use the results in calculations.

Workday delivers a new Published Scheduled Hours for Calendar Day instance value calculation (IVC) that returns the total number of hours a worker is scheduled to work on a specific calendar day for all shifts that start on that day, including hours crossing midnight. This calculation only includes data for schedules created using the Workday Scheduling product.

Note: Although Workday Scheduling supports positions, time off entry validations don't support referencing multiple positions in calculations. Example: If you create a conditional calculation on a Maximum validation that checks the job profile of the position, Workday references the job profile of the primary position.

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/abs/8048608.html

Workforce Management - Leave Units Proration Based on Percentage

S

What's Changing

Workday enables you to configure leave types to prorate leave units taken for workers when they request leave of absence, based on the leave percentage that they enter on the request.

Prorate by Leave Percentage

Workday updates the Balance / Leave Taken tab on the Create Leave Type and Edit Leave Type tasks to include a new Prorate by Leave Percentage check box that you can select to prorate the number of leave units by the value of the Leave Percentage additional field on the leave request.

Workday also delivers a new Prorate by Leave Percentage report field on the Leave of Absence Event business object (secured to the Public Reporting Items domain) that enables you to report on the proration state of all your leave requests. You can use this field in condition rules and custom reports.

Schedule Leave Type Effects Synchronization

Workday updates the Schedule Leave Type Effects Synchronization task to include a new Prorate by Leave Percentage check box that enables you to update that setting on existing leave events for the selected leave types to match the current configuration.

What Do I Need To Do?

You need to configure the new Absence Calendar Experience to use this feature.

What Happens If I Do Nothing?

Workday won't prorate leave units taken for workers when they request leave of absence, based on the leave percentage that they enter on the request.

Community Link https://doc.workday.com/release-notes/en-us/abs/7641334.html

cognizant

Workforce Management - Leave Units Proration Based on Percentage (cont.)

S

What's Changing

Leave Percentage Validation

Workday adds a validation to the Leave Percentage field on the Request Absence task when employees, their manager, or an administrator requests leave of absence for themselves or on behalf of another worker. When the leave type is configured to prorate by leave percentage, Workday displays a warning message that helps prevent you from entering data that might cause incorrect calculation results. Workday recommends that you:

- Enter a numeric value for leave percentage.
- Use decimal values less than 1 only when you need to indicate values lower than 1 percent. Example: Enter 50 to indicate 50 percent and not 0.50..

All Leave Families Report Update

Workday updates the All Leave Families report to display a new Prorate by Leave Percentage column in the Balance/Days Taken section that indicates whether the leave type configuration has the Prorate by Leave Percentage option enabled.

Community Link https://doc.workday.com/release-notes/en-us/abs/7641334.html

Workforce Management - Leave Units Proration Based on Percentage (cont.) S

What's Changing

Leave Units Taken Calculation Logic in Reports

In these reports, when Prorate by Leave Percentage is enabled on the leave type, Workday now displays values with prorated units taken and the balance deducted accordingly for the applicable leave events:

- Leave Results for Organization
- Leave Results for Worker

If a leave type doesn't track balance, Workday returns an Outstanding Balance equal to the total taken as a negative value.

Leave Units Taken Calculation Logic in Report Field Values

Workday updates the calculation logic to consider leave percentage on these report fields on the Leave Request Event business object:

- Units Requested for Current Leave, secured to the Public Reporting Items domain.
- Units Taken for Current Leave Only this Balance Year (Including As-Of Date), secured to the Self-Service: Leave of Absence and Worker Data: Leave of Absence domains.
- Units Taken for Leave Type this Balance Period, secured to the Self-Service: Leave of Absence and Worker Data: Leave of Absence domains.

Community Link https://doc.workday.com/release-notes/en-us/abs/7641334.html

Workforce Management - Leave Units Proration Based on Percentage (cont.)

S

What's Changing

Workday also updates the calculation logic to consider leave percentage on these report fields on the Coordinated Leave/Time Off business object, secured to the Self-Service: Leave of Absence and Worker Data: Leave of Absence domains:

- Units Taken for Leave Type for Prior and this Balance Year (Prior to Current Leave)
- Units Taken for Leave Type for Prior and this Balance Year (Prior to Current Leave) - including Coordinated Leaves/Time Offs
- Units Taken for Leave Type this Balance Year (Prior to Current Leave)
- Units Taken for Leave Type this Balance Year (Prior to Current Leave) - including Coordinated Leaves/Time Offs

Additional Considerations

N/A

Community Link https://doc.workday.com/release-notes/en-us/abs/7641334.html

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Workforce Management - Buy Time Off

S

What's Changing

With 2024R2, Workday delivers the ability to configure time offs that can be purchased so that workers can buy time off.

Buy Time Off Setup

With this release, Workday delivers a new Buy Time Off business process to enable workers to buy time off. The business process can be set up for approvals. Administrators and managers can't buy time off on behalf of workers.

Workday gives you the ability to configure time offs that your workers can buy when you select the new Allow to Buy Time Off check box on the Create Accrual task. On the task, Workday delivers a new Buy Options tab for you to configure the:

- Time period when workers can buy time offs.
- Limit or maximum quantity of time off that workers can buy.
- Period which the maximum limit applies to.
- Allowable time off increments for workers to buy.

What Do I Need To Do?

1. Set up security for the Buy Time Off business process security policy in the Time Off and Leave functional area. Assign the appropriate security groups on the initiating action so that workers can access the Buy Time Off task. Administrators and managers can't buy time off on behalf of workers.
2. Access the Create Accrual task to create an accrual and enable the Allow to Buy Time Off check box. You can't edit this check box after the accrual is created. You can either set up an accrual for buying or as a regular accrual.
3. When you select the check box, on the Calculation tab, Workday automatically sets the Calculation field to 0 and the Options field to None. An accrual configured for buying won't add to the time off plan balance unless the worker buys time off against it.

Community Link https://doc.workday.com/release-notes/en-us/abs/7986946.html

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Workforce Management - Buy Time Off (cont.)

S

What's Changing

Workday also delivers these new tasks (secured to the Set Up: Time Off domain) that you can use to manage and view buy schedules for time offs:

- Create Schedule for Buying Time Off
- Edit Schedule for Buying Time Off
- View Schedule for Buying Time Off

You can configure Workday to display the new Time Off Bought tab on the worker profile when you add the new Time Off Bought report to the Time Off for Worker Profile profile group on the Configure Profile Group task.

In addition, you can configure Workday to display a custom name for terms related to buy time off by accessing the Maintain Custom Labels task.

Workday also delivers these new tasks (secured to the Set Up: Time Off domain) that you can use to manage and view buy schedules for time offs:

- Create Schedule for Buying Time Off
- Edit Schedule for Buying Time Off
- View Schedule for Buying Time Off

What Do I Need To Do?

4. The value in the Buy Time Off Display Name field displays in the Type of Time Off prompt on the Buy Time Off task. Workday recommends you enter the same value as the time off type that users view when they request time off. If the field is blank, the Accrual Name displays.
5. If you configure the Time Off Plan Overrides tab:

- From the Accrual Frequency Method prompt, select either Start of Period or End of Period.
- From the Upper Limit Override prompt, define a limit that the time off balance shouldn't exceed when a worker buys time off.

Community Link https://doc.workday.com/release-notes/en-us/abs/7986946.html

Workforce Management - Buy Time Off (cont.)

S

What's Changing

You can configure Workday to display the new Time Off Bought tab on the worker profile when you add the new Time Off Bought report to the Time Off for Worker Profile profile group on the Configure Profile Group task.

In addition, you can configure Workday to display a custom name for terms related to buy time off by accessing the Maintain Custom Labels task.

Buy Time Off Task

Workday delivers a new Buy Time Off task (secured to the Time Off and Leave domain) that workers can use to buy time off. Workers can also access the task from the:

- Time Off worklet.
- Absence worklet.
- Time and Absence related actions of their worker profile.
- Time Off Balance and Time Off Bought tabs on the Time Off section of their worker profile.
- Actions menu on the Manage Absence report.

What Do I Need To Do?

6. On the Buy Options tab:

a) From the Available to Buy During field, consider these values:

- Anytime. The start and end payroll adjustment dates are automatically calculated based on the buy event. Workday sets the start payroll adjustments date to the most recent of these 2 dates: the date when the buy event is submitted or the date when the time off balance is updated. The end date for payroll adjustments is set to 1 year after the start date for payroll adjustments.
- Fixed Period. A time off plan must be linked to the accrual, and you must to select a Buy Schedule. The only possible values are buy schedules that have the same period schedule as the time off plan that the accrual is linked to.

Community Link https://doc.workday.com/release-notes/en-us/abs/7986946.html

Workforce Management - Buy Time Off (cont.)

S

What's Changing

Workers can also access the Buy Time Off task on their mobile devices (Android, iPhone, and iPad) from their worker profile:

- Time and Absence related actions menu.
- Time Off Bought tab on the Time Off section.

Time Off Bought Tab

Workday updates these reports with a new Time Off Bought tab that enables workers to view the time offs they bought:

- My Absence
- My Time Off
- View Time Off

Maintain Accrual and Time Off Adjustments/Overrides Task

On the Maintain Accrual and Time Off Adjustments/Overrides task, Workday renames the tab and grid from Sell Time Off Adjustments to Buy and Sell Time Off Adjustments. The tab now displays details of time offs bought by workers. In the grid, Workday adds a new Buy or Sell column that displays Buy for time offs bought and Sell for time offs sold. In the grid, Workday only displays completed events.

What Do I Need To Do?

- From the Maximum Limit to Buy prompt, select a calculation to define the limit of time offs that a worker can buy. From the Maximum Limit Applies to prompt, consider these values: (a) Period in which balance is updated. If workers can buy time off any time of the year or multiple times based on the buy schedule, when you select this option, they can buy up to the maximum limit for each period that the balance is updated; (b) Balance Period. If workers can buy time off any time of the year or multiple times based on the buy schedule, when you select this option, they can buy up to the maximum limit for the entire balance period, not for each period that the balance is updated.

7. From the Allowable Increments to Buy prompt, select a calculation to define the increments or multiples of time offs that workers can buy.

Community Link

https://doc.workday.com/release-notes/en-us/abs/7986946.html

Workforce Management - Buy Time Off (cont.)

S

What's Changing

Reporting

Workday delivers a new Time Off Bought by Workers report (secured to the Worker Data: Time Off and Worker Data: Time Off (Time Off Manager View) domains). This report enables you to easily view a list of workers who have bought time off within a selected date range.

Workday also delivers a new Buy Time Off Event business object (secured to the Public Reporting Items domain) with new report fields that you can use in your custom reports to view bought time off details.

Workday delivers a new Buy Time Off Events for Workers report data source (RDS) (secured to the Worker Data: Time Off and Worker Data: Time Off (Time Off Manager View) domains) that you can use to create custom reports to view instances of workers who bought time off.

Workday also delivers a new Buy Time Off Events by Organization and Date Range RDS filter on the Buy Time Off Events for Workers RDS. This enables you to view instances of workers across multiple organizations who bought time off within a selected date range.

What Do I Need To Do?

8. From the Pay Rate for Adjustments prompt, consider these values:

- At the start of first pay adjustment. Workday uses the worker's pay rate at the start of the first pay adjustment period for all pay periods. This is fixed.
- Current rate during each pay period. Workday uses the worker's pay rate for each pay period. This could vary if the worker's pay rate changes in a pay period.
- When time off was purchased. Workday uses the worker's pay rate at the time when they purchased time off for all pay periods. This is fixed.

9. Access the Create Time Off Plan or Edit Time Off Plan task to add the accrual you created to a time off plan on the Accrual tab. The accrual must have either Start of Period or End of Period for the Accrual Frequency Method (on the Time Off Plan Overrides tab). Additionally, you can add regular accruals to the time off plan.

Community Link https://doc.workday.com/release-notes/en-us/abs/7986946.html

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Workforce Management - Buy Time Off (cont.)

S

What's Changing

Workday delivers new report fields on the Accrual business object (secured to the Public Reporting Items domain) that you can use in your custom reports to view configuration options.

Workday also delivers a new Accrual on Buy Time Off Event report field on the Absence Component business object (secured to the Set Up: Calculations - Generic domain) that returns the accrual against which time off was bought and can be used in the context of Workday Payroll.

Workday adds new columns to the All Accruals report, enabling you to easily view which accruals have been configured for buying.

Calculations

Workday makes these calculations publicly available, which you can use when creating earnings and deductions:

What Do I Need To Do?

10. Access the Create Schedule for Buying Time Off task to create a schedule for buying time off. • From the Period Schedule prompt, select a period schedule that matches the period schedule on the time off plan. This time off plan must be associated with the accrual.
11. Define 1 or more time periods when workers can buy time off in the Buying and Accrual Schedule grid: • When selecting a period from the Updated Balance in Period, Workday derives the exact date when the time off bought is updated from the Accrual Frequency Method defined on the time off plan or on the Time Off Plan Overrides tab of the accrual.
12. Select a date range to derive the pay periods in which payroll adjustments (either deductions or negative earnings) for time off bought will be made from the Start Payroll Adjustments on and the End Payroll Adjustments on prompts.

Community Link https://doc.workday.com/release-notes/en-us/abs/7986946.html

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Workforce Management - Buy Time Off (cont.)

S

What's Changing

- Quantity of Bought Time Off to Pay Off in the Current Pay Period. You can find this conditional calculation on the View Conditional Calculation (Workday Owned) report and use it to identify the amount of bought time off that the worker pays off in the current pay period. Workday calculates the value by dividing the total quantity of bought time off by the number of pay periods in which the payroll adjustments are made. Workday recommends you use this calculation for deductions and negative earnings.
- Last Pay Period to Pay Off Bought Time Off. You can find this logic calculation on the View Logic Calculation (Workday Owned) report and use it to identify whether the date to end payroll adjustments falls within the current pay period.
- Quantity of Bought Time Off to be Paid. You can find this arithmetic calculation on the View Arithmetic Calculation (Workday Owned) report and use it to identify the amount of bought time off that the worker has yet to pay.

What Do I Need To Do?

Note: A buy schedule must be linked to an accrual to enable workers to buy time off during fixed periods.

Optional Steps

- Add the Buy Time Off task to 1 or both of these worklets: Absence and Time Off. View the Set Up Worklets link in the Related Links section for more information.
- Access the Configure Profile Group task to display the Time Off Bought tab on the worker profile. From the Profile Group prompt, select Time Off for Worker Profile. In the Report column in the grid, select Time Off Bought.
- Create a custom name for terms related to buy time off. View the Create Custom Labels link in the Related Links section for more information.

What Happens If I Do Nothing?

Workers won't be able to buy time off through Workday.

Community Link https://doc.workday.com/release-notes/en-us/abs/7986946.html

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Workforce Management - Buy Time Off (cont.)

S

What's Changing

- Quantity of Bought Time Off to Pay Off Each Pay Period. You can find this arithmetic calculation on the View Arithmetic Calculation (Workday Owned) report and use it to identify the quantity of time off bought by the worker for each pay period.
- Time Off Bought in a Buy Time Off Event. You can find this instance value calculation (IVC) on the View Instance Value Calculation (Workday Owned) report and use it to identify the total quantity of time off bought by the worker in a single buy time off event.
- Total Pay Periods to Pay Off Bought Time Off. You can find this IVC on the View Instance Value Calculation (Workday Owned) report and use it to identify the number of pay periods that it will take the worker to pay off the bought time off.

Pay Component Groups

Workday makes these pay component groups publicly available. You can find them on the View Pay Component Group report and use them to identify the pay component related calculations for time off bought:

- Buy Time Off in Days
- Buy Time Off in Hours
- Pay Rate for Time Off Bought in Days
- Pay Rate for Time Off Bought in Hours

Community Link https://doc.workday.com/release-notes/en-us/abs/7986946.html

Workforce Management - Buy Time Off (cont.)

S

Additional Considerations

Managers and administrators can’t buy time off on behalf of workers.

You can't add accruals configured for buying time off with position-based time off plans.

You can't use manual pay inputs in Workday Payroll:

- On the deduction or earning, clear the Input Amount Allowed? check box in the Calculation Details section and clear the Input Allowed? check box in the Related Calculations grid.
- When using third-party payroll, Payroll Effective Change Interface (PECI) and Payroll Interface Common Output File (PICOF) aren't currently supported. You can add the new report fields on the new Buy Time Off Event business object in custom integrations or manual inputs in your payroll system.

Community Link https://doc.workday.com/release-notes/en-us/abs/7986946.html

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Workforce Management - Enter Time by Period

S

What's Changing

With this release, Workday enables workers and managers to use the period calendar as their primary time entry method. Workday now also enables you to include scheduling data on the calendar and display information such as holiday events and period indicators.

Workday updates these tasks:

- Create Time Entry Template
- Delete Time Entry Template
- Edit Time Entry Template

For the Primary Calendar prompt, Workday:

- Renames the Classic with Period option to Classic.
- Adds a new Period option.

Workday adds an Include Scheduling Data check box to the Additional Options section. When you select Period or Classic from the Primary Calendar prompt, you can select Include Scheduling Data to include scheduling information on the period calendar.

What Do I Need To Do?

If you already configured the period calendar as an additional calendar view, you now have the option to include scheduling data on the calendar.

If you want to enable the period calendar now, update Primary Calendar on the time entry template to have the period calendar set to either a primary or an additional view.

What Happens If I Do Nothing?

If you do nothing, Workday will continue to display the time entry calendar in the view that is currently configured. If you configured the period calendar as the secondary calendar view, Workday will display the new Period Calendar button to your workers and managers.

Community Link https://doc.workday.com/release-notes/en-us/time/7624711.html

Workforce Management - Enter Time by Period (cont.)

S

What's Changing

When the Enable Workday Scheduling check box on the worker's time entry template is checked, Workday displays Workday Scheduling data. Otherwise, Workday displays scheduling data from the work schedule calendar.

Workday also updates these reports: (1) Enter My Time; (2) Enter Time for Worker.

The period calendar view of these reports now includes: (a) Holidays; (b) Incomplete time blocks; (c) Pay date indicators; (d) Period end indicators; (e) Period lock indicators.

In the classic calendar view of these reports, Workday:

- Adds a Period Calendar button that enables you to switch to the period calendar view.
- Removes the Enter Time by Period option from the Actions drop-down menu.

In the period calendar view of the Enter My Time report, Workday adds these options to the Actions drop-down menu:

- Overtime Requests
- Manage Absence
- Request Absence
- View Absence Balances

Community Link https://doc.workday.com/release-notes/en-us/time/7624711.html

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Workforce Management - Enter Time by Period (cont.)

S

What's Changing

In the period calendar view of the Enter Time for Worker report, Workday adds these options to the Actions drop-down menu: (1) My Team's Overtime Requests; (2) Manage Absence; (3) Request Absence for a Worker; (4) View Absence Balances.

These options only apply to the new absence calendar experience: (1) Manage Absence; (2) Request Absence; (3) Request Absence for a Worker.

The period calendar, if enabled as primary, is supported in delegation, Revise Time in My Tasks, and all other places you can access the Enter My Time and Enter Time for Worker reports.

The period calendar doesn't display these items: (1) PDF printing; (2) Business process help text; (3) Overtime request blocks.

Additional Considerations

N/A

Community Link https://doc.workday.com/release-notes/en-us/time/7624711.html

Workforce Management - Automatically Submit Time

S

What's Changing

Workday enables you to easily create schedules to automatically submit time.

Workday adds a new Process: Auto Submit Time domain to enable time tracking administrators to automatically submit time for several users at once using a batch process.

Workday adds a new Auto Submit Time task (secured to the Process: Auto Submit Time domain) to enable you to configure the frequency at which time will be automatically submitted so that you can have different settings for different time entry templates. This task provides additional flexibility to create auto-submit schedules for all time, all imported time, or imported time with the Auto Submit value set to true.

Workday also enables you to search for unsubmitted time for up to 365 days before or after the run date.

Time Block Report Fields

Workday delivers these report fields:

- Time Block Last Submitted Date on the Time Block business object.
- Time Block Status on the Time Block (Coordinated) business object.

What Do I Need To Do?

Enable the Process: Auto Submit Time domain and configure security policies.

Access the Auto Submit Time task.

Configure the frequency at which time will be automatically submitted so that you can have different settings for different time entry templates.

To automatically submit time using web service, update the web service to v43.0 or later.

What Happens If I Do Nothing?

You can continue to use the Mass Submit Time task to schedule the submission of time based on period.

Community Link https://doc.workday.com/release-notes/en-us/time/8018753.html

Workforce Management - Automatically Submit Time (cont.)

S

What's Changing

The report fields are secured to the Reports: Time Tracking domain.

Reported Time Blocks for a Date Range Report

Workday adds a new standard Reported Time Blocks for a Date Range report (secured to the Reports: Time Tracking domain) enabling you to identify reported time blocks within a specific date range for better time submission for payroll processing and better time management of your teams.

Workday also delivers a new data source filter that filters the All Time Blocks report data source to return reported time blocks within a specific date range.

Import Reported Time Blocks Web Service

Workday adds a new Auto Submit field to these web services to automatically submit a time block: (1) Import Reported Time Blocks; (2) Import Time Clock Events; (3) Put Time Clock Events

Note: To use the Auto Submit field to automatically submit time, you must update the web service to v43.0 or later.

Additional Considerations

N/A

Community Link https://doc.workday.com/release-notes/en-us/time/8018753.html

Workforce Management - Effective Date Support for Midweek Changes in Time Calculations

S

What's Changing

With this release, Workday supports midweek changes in worker eligibility, providing you the option to evaluate worker eligibility for time calculations daily, rather than applying end of the week eligibility.

Edit Tenant Setup - HCM Task

Workday displays a new Run Time Calculation Eligibility Day by Day check box on the Edit Tenant Setup – HCM task, which enables you to evaluate worker eligibility for daily time calculations. When you select the check box, Workday displays a new Start Daily Evaluation on Date prompt option that you can use to select a date when daily evaluation of eligibility begins. When you select a date in the middle of the week, daily evaluation applies to the entire week.

Time Calculation Eligibility Changes Reporting

Workday delivers a new Time Calculation Eligibility Changes report (secured to the Set Up: Time Tracking domain) that enables you to identify worker eligibility changes for time calculation groups and time calculation group snapshots for the selected start and end dates.

What Do I Need To Do?

1. Access the Edit Tenant Setup - HCM task, find the Time Tracking section, and enable the Run Time Calculation Eligibility Day by Day check box. This setting applies to all workers in the tenant.
2. Select the date for which you want daily eligibility evaluation to begin. If you select a date:

- In the past, you need to run time calculations to capture any changes in calculation eligibility.
- In the middle of the week, daily evaluation is applied for the entire week.

3. Access one of these tasks and use the new Country / Country Region prompt to further filter the group of workers for which Workday runs daily time calculation eligibility, improving performance:

- Create Time Calculation Group
- Edit Time Calculation Group

Community Link https://doc.workday.com/release-notes/en-us/time/7298725.html

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Workforce Management - Effective Date Support for Midweek Changes in Time Calculations (cont.)

S

What's Changing

The report includes these prompts:

- Job Profiles
- Locations
- Organizations
- Workers

Workday also adds a link to the report on the output page of the Time Calculation Debugger report.

Shift Blocks Crossing Weeks with Eligibility Changes Reporting

When you enable Workday to evaluate worker eligibility on a daily basis, Workday now removes the time-calculation-related columns from these reports: (1) Find Shift Blocks Crossing Weeks with Eligibility Changes; (2) View Shift Blocks Crossing Weeks with Eligibility Changes.

What Do I Need To Do?

4. Workers enter their time as usual.
5. Use the Time Calculation Debugger report to check for changes in the calculation results:

- Expand the Evaluate Time Calculation Eligibility Settings section, and select the Configure When to Evaluate Time Calculation Eligibility check box.
- When your tenant-level setting is set to daily evaluation, don't select the Evaluate Time Calculation Eligibility Daily check box to review the report output based on end of week eligibility.
- When your tenant-level setting is not set to daily evaluation, select the Evaluate Time Calculation Eligibility Daily check box to review the report output based on daily eligibility.

6. View time calculation eligibility changes for workers with the new Time Calculation Eligibility Changes report.

Community Link https://doc.workday.com/release-notes/en-us/time/7298725.html

Workforce Management - Effective Date Support for Midweek Changes in Time Calculations (cont.)

S

What's Changing

Results

You can no longer use the reports to track time calculation eligibility changes. Workday recommends that you use the new Time Calculation Eligibility Changes report instead.

Worker Eligibility Time Period Reporting

Workday delivers a new Worker Eligibility Time Period report data source (secured to the Set Up: Time Tracking and Set Up: Time Calculations domains) and a new Worker Eligibility Time Period business object, with these new report fields that you can use in custom reports to report on worker eligibility changes:

- End Date
- Start Date
- Time Calculation Groups Snapshot
- Time Calculation Snapshots
- Time Tracking Eligibility
- Worker

What Happens If I Do Nothing?

You'll see no change in how worker eligibility for time calculations is evaluated. Workday will continue to apply the current calculation snapshot criteria to the entire week.

Continue to use the Find Shift Blocks Crossing Weeks with Eligibility Changes and View Shift Blocks Crossing Weeks with Eligibility Changes Results reports to track time calculation eligibility changes.

However, you can use the new:

- Options that support this feature when you run the Time Calculation Debugger report.
- Country / Country Region prompt on the Create Time Calculation Group and Edit Time Calculation Group tasks for improved filtering for groups of workers when Workday evaluates daily time calculation eligibility.

Community Link https://doc.workday.com/release-notes/en-us/time/7298725.html

Workforce Management - Effective Date Support for Midweek Changes in Time Calculations (cont.)

S

What's Changing

Time Calculation Debugger

Workday adds a new Evaluate Time Calculation Eligibility Settings section when you run the Time Calculation Debugger report. Under the section, Workday adds a new Configure When to Evaluate Time Calculation Eligibility check box, which:

- Defaults to your current tenant-level setting, Run Time Calculation Eligibility Day by Day check box.
- Enables you to run the report with the alternate state of your tenant-level setting and compare changes in calculation results.

Once the check box is selected, Workday displays a new Evaluate Time Calculation Eligibility Daily check box, enabling you to review the report output based on daily eligibility. When your tenant-level setting is set to daily evaluation, don't select the check box to review the report output based on end of week eligibility. The options you select when you run the Time Calculation Debugger report don't change your tenant-level setting, and the report output is not persisted.

Workday also adds a link to the new Time Calculation Eligibility Changes report on the output page of the Time Calculation Debugger report. This enables you to easily review results of the Time Calculation Eligibility Changes report.

Country / Country Region Prompt on Time Calculation Group Tasks

Workday adds a new Country / Country Region prompt on these tasks that you can use for improved filtering for groups of workers when running daily time calculation eligibility:

- Create Time Calculation Group
- Edit Time Calculation Group

Community Link https://doc.workday.com/release-notes/en-us/time/7298725.html

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Workforce Management - Effective Date Support for Midweek Changes in Time Calculations (cont.)

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Additional Considerations

- Effective dating changes take effect at 00:00 (midnight) in the worker's time zone.
- Calculation snapshots will now be evaluated daily. This means, override rate changes or other premiums can change midweek without an eligibility change.
- Daily evaluation of worker eligibility for time calculations will have an impact on tenant performance and should be evaluated based on customers' needs.
- Workday has updated the way Workday handles biweekly calculations for all customers to improve accuracy.
- Use the new Time Calculation Eligibility Changes report to track time calculation eligibility changes.

Community Link https://doc.workday.com/release-notes/en-us/time/7298725.html

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Workforce Management Retiring Functionalities

These include items beginning their retirement for the first time, items whose retirements have changed, and items that are fully retiring as of Workday 2024R2.

Workforce Management

- Enter Time (Weekly Grid)
- Create Project Worksheet Task
- Web services of Accrual, Time Off and Leave
- Time Off Taken in Date Range RDS
- Revise Correct Time Off and Revise Time Off tasks

Workforce Management - Enter Time (Weekly Grid)

What's Changing

Workday now plans to retire the Enter Time (weekly grid) task on the Time Entry Calendar, accessible from the Enter time button.

Additional Considerations

Workday replaces the retiring item with the existing Enter Time By Week task.

What Do I Need To Do?

May impact your training materials. Workday recommends that you update your time entry calendar preferences when Workday delivers the new task and disable the Enter Time (weekly grid) functionality.

What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/time/707641.html

Workforce Management - Create Project Worksheet Task

What's Changing

Workday now plans to retire the Create Project Worksheet task and project worksheets functionality.

Additional Considerations

Workday replaces the retiring item with the Workday Time Tracking.

What Do I Need To Do?

May impact your training materials.

Workday recommends that you purchase Workday Time Tracking, a separate product (SKU) requiring a separate license, instead of using Workday project worksheets.

You can continue to:

- View your existing project worksheets
- Create and run reports using existing report data sources

What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/time/1200210.html

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Workforce Management - Web services of Accrual, Time Off and Leave

What's Changing

Workday now plans to retire these Web services:

- AddUpdate Absence Balances
- AddUpdate Accruals
- AddUpdate Balance Periods
- AddUpdate Leave of Absence Family
- AddUpdate Lookup Table Setups
- AddUpdate Time Off Plans
- AddUpdate Time Off Type
- AddUpdate Time Offs
- GetAll Absence Balances
- GetAll Accruals
- GetAll Balance Periods
- GetAll Leave of Absence Families
- GetAll Lookup Table Setups
- GetAll Time Off Plans
- GetAll Time Off Types
- GetAll Time Offs

What Do I Need To Do?

May impact your training materials and require additional testing. Workday recommends you start using the new web services.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/abs/939134.html

Workforce Management - Web services of Accrual, Time Off and Leave (cont.)

Additional Considerations

Workday replaces retiring item with these Web services:

- Put Absence Balance
- Put Accrual
- Put Balance Period
- Put Leave Type
- Put Leave Family
- Put Lookup Table
- Put Time Off Plan
- Put Time Off Type
- Put Time Off
- Get Absence Balances
- Get Accruals
- Get Balance Periods
- Get Leave Types
- Get Leave Families
- Get Lookup Tables
- Get Time Off Plans
- Get Time Off Types
- Get Time Offs

Community Link https://doc.workday.com/release-notes/en-us/abs/939134.html

Workforce Management - Time Off Taken in Date Range RDS

What's Changing

Workday now plans to retire Time Off Taken in Date Range (Do Not Use) report data source (RDS).

Additional Considerations

Workday replaces the retiring item with Time Off by Date Taken RDS.

What Do I Need To Do?

May impact your training materials. Workday recommends that you use the new RDS on custom reports.

What Happens If I Do Nothing?

N/A

Retirement Date

2024-09-21

Community Link https://doc.workday.com/release-notes/en-us/abs/931189.html

Workforce Management - Revise Correct Time Off and Revise Time Off tasks

What's Changing

Workday now plans to retire Revise Correct Time Off and Revise Time Off tasks.

Additional Considerations

Workday replaces the retiring item with inbox tasks to replace the deprecated tasks.

What Do I Need To Do?

May impact your training materials..

What Happens If I Do Nothing?

N/A

Retirement Date

2025-03-08

Community Link https://doc.workday.com/release-notes/en-us/abs/1190038.html

Thank you