Automatically available features manual

Workday 2025R1

As of 14 February 2025

Cognizant's forward-looking statement

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Workday’s safe harbor

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

Select the guide that's right for you

You are here

Automatically available features manual

- Comprehensive list of the automatically available features included in the release
- Also includes retired functionality
- **Helps you determine where to focus testing efforts during the release preview window**

Top features manual

- Overview of specific features our experts have identified as most impactful to you
- Includes automatically available and setup required
- **Helps you update your roadmap and plan efforts beyond the release window**

Impact analysis manual

- Deeper dive into how the features may impact you by providing before and after details and estimated level of effort
- Includes the Workday "Coming Soon" features
- **Helps you understand which features for which you may need to prepare**

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Release preparation tips

Quick reference for steps to take during the release preparation window

Check Release Center
- Review Automatically Available items
- Subscribe to important Release Notes in Community
- Review retirement Release Notes

Change management plan
- Changes to user experience or process updates
- Retiring functionality
- When to uptake Setup Required functionality

Prepare the tenant
- Run audit reports and resolve issues:
  - In Production ***before*** Sandbox Preview is updated with the release
  - In Sandbox Preview ***after*** it is updated with the release

Execute test plans
- Test integrations first
- System data validation
- Critical business processes
- Critical custom reports

Visit Workday's Feature Release Planning guide (US) here: https://community-content.workday.com/en-us/reference/learn/get-started/get-started-with-workday/feature-release-planning.html

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Additional release support services

Take advantage of one of our **Release Plus** packages

Option 1	Option 2	Option 3	Add On
Pre-release consulting support	Pre-/Post release audits, feature review, consulting support	Full Support	Regression Testing
Recommended for Clients that are self-sufficient in Workday and have the time to complete release management audits and resolve messages themselves, with guidance from Cognizant	Recommended for clients that need assistance resolving issues and may not have time or resources to conduct all audits	Recommended for clients that need assistance running audits and resolving issues and/or may not have time or resources to conduct audits and resolve messages	Recommended for clients that need assistance with testing entire modules and/or may not have the time or resources do this themselves

Contact your Service Delivery Lead (EM, SDM, PA) for more details on each package, or submit a Salesforce Service Cloud case (indicating the specific Release Plus Package option in the title and description) no later than February 3rd.

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Adaptive Planning

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Financial Planning Configuration Manager Accounts and Categories Flexibility

What's changing

With this release, Workday enables revenue and spend category account attributes. You can also add top level hierarchies for revenue and spend category to an existing financial planning configuration.

Additional considerations

In the Accounts page, you can now select top level hierarchies for both Revenue and Spend Category if you included them in your account concatenation.

When you access an existing financial planning configuration, you can add top level hierarchy selections.

What happens if I do nothing

Your financial planning configuration manager continues to function as it did.

https://doc.workday.com/release-notes/en-us/plnpone/8736910.html

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Introducing Shared Scenarios

What's changing

Workday now enables you to share your personal scenarios with other collaborators. To establish workflows and to keep stakeholders informed, Workday provides automatic notifications for various new actions.

Additional considerations

Workday provides new options for Scenario owners, Collaborators, and Managers. New notifications are also available for Owners and Collaborators each step of the way. New scenario maximums are also available as well as a new set of permissions.

What do I need to do

Workday automatically adds the Share Scenarios permission to any permission set with an active Manage Scenarios permission. If you manage Adaptive Planning security through Workday Core, you must manually enable the Share Scenarios action for Action Groups.

What happens if I do nothing

Users with the Manage Scenarios permission can start sharing scenarios.

For customers that use Workday core to manage Adaptive Planning security, no one can start sharing scenarios until you activate the action.

https://doc.workday.com/release-notes/en-us/plnmod/8729667.html

Snowflake support for Cloud Data Connect and Design Integrations

What's changing

Workday now enables Snowflake in Cloud Data Connect and as a data source in Design Integrations.

Additional considerations

Snowflake displays as an option when you navigate to:

- Integration > Setup Pipeline.
- Integration > Design Integrations and select Create New Data Source > CDC.

https://doc.workday.com/release-notes/en-us/plnint/8733037.html

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Workday Adaptive Planning Data Agent Upgrade

What's changing

With this release, Workday upgrades the Workday Adaptive Planning Data Agent to Java 11 and Pentaho Kettle PDI 9.3 for added security and long-term support.

Additional considerations

Workday upgrades the Workday Adaptive Planning Data Agent to Java 11 and Pentaho Kettle PDI 9.3.

Workday updates the Workday Adaptive Planning Data Agent to version v19.

What do I need to do

Verify that your Pentaho PDI scripts built in Pentaho 8.3 continue to function in Pentaho 9.3.

Separate steps are available depending on whether or not Workday integrates with Pentaho.

What happens if I do nothing

If you don't use Pentaho, the Workday Adaptive Planning Data Agent versions prior to 2025R1 (pre version 19.x) will continue to run as usual.

If you use Pentaho, Workday Adaptive Planning Data Agent versions prior to 2025R1 (pre version 19.x) and their Pentaho 8.3 integrations will continue to run as usual.

https://doc.workday.com/release-notes/en-us/plnint/8501777.html

Adaptive Planning Notifications

What's changing

With the 2025R1 release, Workday now displays the notifications icon and page to all users.

Additional considerations

Workday now delivers the notification icon and notification page to all users. For this release Workday adds notifications including notifications from sharable scenarios.

https://doc.workday.com/release-notes/en-us/plndash/8723551.html

Perspective Folders in Dashboards

What's changing

With the 2024R2 release, Workday now enables you to use folders to manage dashboard perspectives.

Additional considerations

You can now add folders with the new Folders icon to organize perspectives.

https://doc.workday.com/release-notes/en-us/plndash/8581011.html

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LightGBM Algorithm Supports Lever Sheets for Predictive Forecaster

What's changing

Workday delivers the option to add lever sheets for forecasts when using the LightGBM algorithm.

Additional considerations

Workday now provides the Lever Sheet drop-down prompt in the Algorithm section when you're creating or editing a forecast with the LightGBM algorithm. The prompt enables you to select up to 3 modeled sheets to use as levers.

https://doc.workday.com/release-notes/en-us/plnmod/8727591.html

LightGBM Algorithm Supports Lever Sheets for Predictive Forecaster, continued

What do I need to do

You can create new LightGBM forecasts and use lever sheets. Or you can add lever sheets to existing forecasts that use LightGBM:

1. From the main menu, select Modeling.
2. Select Predictive Forecaster.
3. Hover over the forecasts in the list to access the More Actions menu.
4. Click the 3 dots that display and select Edit.
5. In the Algorithm section, use the Lever Sheet prompt to add lever sheets to the forecast.
6. Select Run or Save to run it later.

What happens if I do nothing

The option is available for all new and existing forecasts that use algorithms that support lever sheets, which now include LightGBM.

https://doc.workday.com/release-notes/en-us/plnmod/8727591.html

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Chart Improvements in Dashboards

What's changing

With the 2025R1 release,
Workday improves the time display and selector in charts.

Additional considerations

Workday updates the location of the time display in charts to the upper right corner by default. Workday also adds the following fields in Appearance Settings:

- Show Time Period.
- Position.

When you hover over a chart, the Reset to Default, Select Time Period, Expand, and Chart options icons now display above the chart.

Workday also moved all time period related actions in the new Select Time Period icon:

- Set the calendar stratum.
- Time period and range.
- Pin and unpin time.

https://doc.workday.com/release-notes/en-us/plndash/8749494.html

Bottom-Up Workforce Planning: Hierarchical Routing

What's changing

With this release, Workday enables you to route up your organization hierarchy for your headcount and headcount forecast plans when you perform bottom-up, position-level workforce planning.

Additional considerations

When you select top level hierarchy and supervisory organizations to include on these tasks, Workday now uses the hierarchy structure to route My Tasks items for the headcount and headcount forecast plans to supervisory organization members:

- Configure Headcount Plan.
- Create Headcount Forecast.

Workday also adds a new Your Assigned Planning Organizations field on your My Tasks items that displays:

- The planning organizations that are assigned to you.
- The planning organizations that you inherit.

https://doc.workday.com/release-notes/en-us/plnpone/8557903.html

Bottom-Up Workforce Planning: Hierarchical Routing, continued

What do I need to do

Evaluate headcount plan approvals against roles in the hierarchy. To route My Tasks items to all planners and managers involved in the headcount planning process, assign them to security groups with access to these domains:

- Participate: Headcount Planning domain in the Adaptive Planning for the Workforce functional area. (Optional) Compensation Details: Headcount Planning in the Adaptive Planning for the Workforce functional area.

Ensure that you include all plan participant security groups on the Shared Participation Step of the Headcount Planning business process.

What happens if I do nothing

If you do nothing, any existing headcount and headcount forecast plans still in progress retain the flattened routing. Any new headcount and headcount forecast plans that you create use the new organization hierarchy routing behavior.

https://doc.workday.com/release-notes/en-us/plnpone/8557903.html

Automatically Available

Bottom-up Workforce Planning

What do I need to do

With this release, Workday continues to enhance your bottom-up, position-level workforce planning experience by ensuring that you set up your headcount planning integration system user, displaying additional validation messages, and clarifying the headcount planning background job statuses.

Additional considerations

Workday now requires you to select an integrated system user for headcount planning on the Headcount Planning tab of the Adaptive Planning tab on the Tenant Setup report.

On the initial prompt page of these tasks, Workday now displays an error message if no headcount planning integration system user exists:

- Configure Headcount Plan.
- Create Headcount Forecast.

On the Configure Headcount Plan task, Workday also displays an error message if no active workforce planning configuration manager exists to use to configure a headcount plan.

On the Create Headcount Forecast task, Workday also displays an error message if no approved headcount plan exists to use to create a headcount forecast.

On the View Headcount Planning Configuration report, Workday clarifies the background job statuses that display after you try to create headcount and headcount forecast plans.

https://doc.workday.com/release-notes/en-us/plnpone/8703304.html

Perspective Favorites in Dashboards

What's changing

With this release, Workday now enables you to favorite perspectives.

***Note**: This functionality is only available to Adaptive Planning Preview customers at this time. Workday plans to deliver this to all customers on March 15, 2025.*

Additional considerations

You can now favorite a perspective.

https://doc.workday.com/release-notes/en-us/plndash/8379744.html

Add reports on dashboards

What's changing

Workday now enables you to add existing shared matrix reports on a dashboard to view it alongside related charts and sheets.

- When you share this dashboard with users, they see:
  - The data to which they have access.
  - An error message if they don't have access to the report.

Additional considerations

- If using dashboards to aid with the planning process, consider creating shared reports to include with the sheet or chart interaction. You might be able to simplify your dashboards or process tasks by including shared reports on the dashboards.
- Consider creating a Dashboards folder to place shared reports designed for use in dashboards.

What do I need to do

To add report on dashboards, you need these permissions assigned to you:

- Access Dashboards > Edit Dashboards.
- Access Reports.

What happens if I do nothing

Without the required permissions, you can't add reports to dashboards.

https://doc.workday.com/release-notes/en-us/plnrpt/8729577.html

Reporting in Billions

What's changing

Workday now enables you to configure the magnitude of your reporting data to display numbers in billions for matrix reports.

What do I need to do

To display numbers in billions in your reports, from the **Numbers** tab of the Report Properties dialog, select the **Show in billions** magnitude.

Additional considerations

From your report properties, you can now configure the Magnitude option to display your reporting numbers in billions (compared to only millions previously).

What happens if I do nothing

If you do not set the report property to display numbers in billions, you'll not see any numbers in billions in your reports.

https://doc.workday.com/release-notes/en-us/plnrpt/8729951.html

Report Parameter Behavior

What's changing

Workday now enhances report parameter behavior to provide consistency and automated selection for available choices.

Additional considerations

When you create new report parameters using levels, dimensions, and attributes:

- If all the values except the (only) and (uncategorized) are selected, then any new values are automatically selected as available choices.
- Irrespective of whether you add the parameters from the report filters or the report rows and columns, the behavior is now consistent.

https://doc.workday.com/release-notes/en-us/doc/8729954.html

Report Parameter Behavior, continued

What do I need to do

This feature only applies to all new reports. For any existing reports, you need to manually update the available parameter choices and save.

What happens if I do nothing

This feature only applies to all new reports. Any existing reports don’t reflect the latest behavior.

https://doc.workday.com/release-notes/en-us/doc/8729954.html

Automatically available

Reset to Default View on Sheets

What’s changing

With this release, Workday now enables you to reset your sheets back to the default view when the sheet is unable to load due to invalid filters and display option settings.

Additional considerations

When your sheets can't be loaded due to invalid filters and display option settings, Workday now enables you to select the Reset to Default View toolbar icon. Workday also clarifies the error message that displays to tell you to either:

- Contact your administrator.
- Select the Reset to Default View toolbar icon.

https://doc.workday.com/release-notes/en-us/doc/8765223.html

Bottom-Up Workforce Planning: Organizational View

What's changing

With this release, Workday enables you to use an organization hierarchy chart to view larger, summarized populations of people when you perform bottom-up, position-level workforce planning.

Additional considerations

Workday adds a new switch that enables you to switch the way you view your headcount or headcount forecast plan between:

- A grid with individual position details.
- A new organization hierarchy chart with summarized position details.

In the organization hierarchy view, you can also create and edit positions.

Workday adds the new switch in the upper-right corner of your page when you view headcount or headcount forecast plans using these My Tasks items:

- Headcount Planning Event.
- Headcount Planning Participant Detail Event.

https://doc.workday.com/release-notes/en-us/plnpone/8612524.html

Bottom-Up Workforce Planning: Organizational View, continued

What do I need to do

The organizational view only supports the organization type defined as the Level.

What happens if I do nothing

If you do nothing, you can continue to view and plan using a grid with individual position details.

https://doc.workday.com/release-notes/en-us/plnpone/8612524.html

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Modeled Sheet Data Validations

What’s changing

With this release, Workday continues to enhance your ability to use data validation rules for user-entered data on modeled sheet cells, enabling you to create more active validation rules.

Additional considerations

On the Data Validation Rules page of your modeled sheet in Model Management, instead of restricting you to a maximum of 10 active validation rules, Workday now enables you to have up to 15 maximum active validation rules.

What happens if I do nothing

If you do nothing, you can continue to run the 10 or fewer active validation rules that already exist because that's still under the 15 rule maximum.

https://doc.workday.com/release-notes/en-us/plnsheet/8700902.html

Version-Specific Overrides for Linked Accounts

What’s changing

Workday now provides options in the account settings to enable linked accounts for data entry in specific plan versions.

Additional considerations

Workday provides these new options in the Link Filters section of the account settings:

- Override links for specific version: Workday enables you to select this check box to display the override fields for the account.
- Link Version Selector: Workday enables you to select a plan version for the override.
- Override Link Setting: Workday provides these options: None to keep the link, and Data Entry to enable imports and data input on sheets.

Workday provides the new options in the account settings of the target accounts that support links:

- Cube Standard.
- Cube-Entered.
- General Ledger.
- Custom.

https://doc.workday.com/release-notes/en-us/plnint/7846603.html

Automatically available

Version-Specific Overrides for Linked Accounts, continued

Additional considerations

After you set up the override, you can enter data:

- In sheets.
- With manual imports.

For Preview tenants, you can load and export the data through:

- Loaders in Design Integrations for only general ledger and custom accounts.
- customReportValues and exportData APIs.

At this time, Workday shows plan data during actuals overlay periods when a linked account has both of these settings:

- Enable Actuals for Link for the Actuals Overlay setting.
- Data Entry for the Override Link Setting.

https://doc.workday.com/release-notes/en-us/plnint/7846603.html

Version-Specific Overrides for Linked Accounts, continued

What do I need to do

To enable the feature for a linked account:

- Go to Modeling.
- Click: Custom Account.
- General ledger.
- Edit a cube sheet and click Cube Accounts from the Sheet Summary page.
- Select the linked account from the account list.
- Click the check box for Override links for specific version.
- Complete the other fields that display.
- Save.
- Load or enter data.

What happens if I do nothing

The options remain available to use when you need it.

https://doc.workday.com/release-notes/en-us/plnint/7846603.html

Analytics and Reporting

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Mass Copy Composite Report Rows

What’s changing

Workday simplifies report authoring by enabling you to mass copy composite report rows.

Additional considerations

Workday adds the new Import Rows button to the All Rows section on the Rows tab when you create or edit a composite report.

You can copy rows from composite reports that:

- Use the same control fields as the target report.
- Use the same hierarchy structures as the target report.
- Include lookup data, calculation, or empty rows. Workday excludes source reports with dynamic or combine data rows.

You can copy cell labels by selecting Include Cell Label and determine the import style of the copied rows.

https://doc.workday.com/release-notes/en-us/anabiui/8627984.html

Mass Copy Composite Report Rows, continued

Additional considerations

- Delete and Replace clears all rows on the target report and replaces them with rows copied from the source report.
- Append adds the copied rows after the last defined row on the target report.

Workday also delivers the new Mass Copy and Replace Composite Rows task and View Mass Copy and Replace Composite Row History report (secured to the Custom Report Administration domain). The task enables you to select multiple target reports as the recipient of the copied rows from a source report, following the same logic as the Import Rows button.

The report enables you to view the process history of mass copied composite reports and replaced composite rows based on the selected time period and user for audit purposes.

https://doc.workday.com/release-notes/en-us/anabiui/8627984.html

Mass Copy Composite Report Rows, continued

What do I need to do

Nothing. This feature is automatically available.

What happens if I do nothing

You will still see the new Import Rows button on your composite reports, in addition to the new **Mass Copy and Replace Composite Rows** task and **View Mass Copy and Replace Composite Row History** report.

https://doc.workday.com/release-notes/en-us/anabiui/8627984.html

Business Views for Reporting

What’s changing

Workday improves on the Report Writer authoring experience by enabling you to use business view data sources that blend data from multiple data sources on composite reports and dashboards.

What do I need to do

Nothing. This feature is automatically available.

Additional considerations

Workday now supports business view data sources on composite reports and dashboards.

What happens if I do nothing

This feature is automatically available.

https://doc.workday.com/release-notes/en-us/anacomposite/6416701.html

Automatically available

Configurable Facet Sorting on Search Reports

What's changing

With this release, Workday gives you more control over custom search reports by enabling you to sort facet values.

Additional considerations

Workday adds the new Facet Value Sorting column in the Facet Options section on the Advanced tab for search reports when you access these tasks:

- Create Custom Report.
- Edit Custom Report.

This enables you to change the sort order of facet values to:

- Alphabetical ascending.
- Alphabetical descending.
- Logical ascending, where applicable.
- Logical descending, where applicable.

https://doc.workday.com/release-notes/en-us/anabi/8720058.html

Configurable Facet Sorting on Search Reports, continued

Additional considerations

You can't sort:

- Currency fields.
- Date fields.
- Numeric fields.
- Facets with more than 55 values.

For currency, date, and numeric fields, you can continue to use the Create Facet Configuration task.

https://doc.workday.com/release-notes/en-us/anabi/8720058.html

Automatically available

Configurable Facet Sorting on Search Reports, continued

What do I need to do

Nothing. This feature is automatically available on search reports.

What happens if I do nothing

Workday still displays the new **Facet Value Sorting** column on custom search reports.

https://doc.workday.com/release-notes/en-us/anabi/8720058.html

Performance Enhancements on Drill-To Report Links

What's changing

Workday makes composite reports more performant by enhancing Drill-To report links.

What do I need to do

Nothing. This feature is automatically available.

Additional considerations

Workday improves performance.

What happens if I do nothing

This feature is automatically available.

https://doc.workday.com/release-notes/en-us/anacomposite/8732892.html

Automatically available

Access Restriction Support for Discovery Boards Download as CSV

What's changing

Workday now enforces access restrictions for discovery boards to prevent users from downloading viz data as a CSV.

Additional considerations

With this release, discovery board users won't see the Download as CSV viz menu option when they are in a security group with an access restriction that includes either of these options in the Excludes Functionality prompt:

- Export to PDF or Excel and (Except Payslips and W2s).

What do I need to do

If you want to prevent discovery board users from seeing the Download as CSV viz menu option, then create an access restriction for the users' security group using the Create Access Restriction task.

When you define the access restriction, select either of these options in the **Excludes Functionality** prompt:

- Export to PDF or Excel.
- Export to PDF or Excel (Except Payslips and W2s).

What happens if I do nothing

Some discovery board users might lose the ability to see the Download as CSV viz menu option if they are already covered by an existing access restriction that prevents them from exporting to PDF or Excel.

https://doc.workday.com/release-notes/en-us/anadisco/8729580.html

Automatically available

Maintain Calculated Fields for Report Task

What's changing

With this release, Workday enhances the Maintain Calculated Fields for Report task by providing additional columns and options.

Additional considerations

Workday adds these 2 new columns on the Maintain Calculated Fields for Report task:

- Usage, which enables you to view where you use the calculated field.
- Convert, which enables you to convert a report-specific calculated field into a tenant-wide calculated field.

You can click Convert All to quickly convert all report-specific calculated fields into tenant-wide calculated fields.

What do I need to do

Nothing. This feature is automatically available.

What happens if I do nothing

Workday still displays the new columns on the Maintain Calculated Fields for Report task.

https://doc.workday.com/release-notes/en-us/anabi/8779202.html

Highlight Viz Data in Discovery Boards

What's changing

With this release, Workday expands the data highlighting functionality in Table vizzes by enabling you to highlight Date, Text, and Boolean values based on specified conditions.

Additional considerations

Workday updates the Formatting panel to enable discovery board editors to add conditional formatting options for Date, Text, and Boolean values at either the column level or the table level. These options are in addition to the existing functionality to add conditional formatting to number values (both Numeric and Currency fields).

When you define a conditional format for a specific field type, Workday displays the comparison operators that apply to that field type. Example: Workday includes the Is true and Is false operators for Boolean values, and the Contains and Starts with operators for Text values.

https://doc.workday.com/release-notes/en-us/anadisco/8546253.html

Highlight Viz Data in Discovery Boards, continued

What do I need to do

Nothing, but if you want to highlight Date, Text, or Boolean values in a Table viz based on a condition, then you can edit the viz using the Formatting panel.

What happens if I do nothing

Table viz formatting options continue to work as they did previously.

https://doc.workday.com/release-notes/en-us/anadisco/8546253.html

Maintain Calculated Fields Task

What's changing

With this release, Workday enhances the Maintain Calculated Fields task by providing additional columns and options.

Additional considerations

Workday adds these 2 new columns on the Maintain Calculated Fields task:

- Usage, which enables you to view where you use the calculated field.
- Convert, which enables you to convert a tenant-wide calculated field into a report-specific calculated field.

Workday displays Convert when the calculated field has only 1 usage.

Workday doesn't display Convert when a calculated field references another calculated field:

- With many usages.
- That hasn't been converted yet.

https://doc.workday.com/release-notes/en-us/anabi/8779202.html

Maintain Calculated Fields Task, continued

What do I need to do

Nothing. This feature is automatically available.

What happens if I do nothing

Workday still displays the new columns on the **Maintain Calculated Fields** task.

https://doc.workday.com/release-notes/en-us/anabi/8779202.html

Arithmetic Summarization Calculations for Advanced Reports

What's changing

With this release, Workday continues to make improvements to advanced reports by supporting arithmetic summarization calculations.

What do I need to do

Nothing. This feature is automatically available.

Additional considerations

Workday supports Workday-delivered summarization calculations for:

- Advanced reports (arithmetic only).
- Advanced and matrix subreports on composite reports.

What happens if I do nothing

This feature is automatically available.

https://doc.workday.com/release-notes/en-us/anabi/7834636.html

Automatically available

CSV Output for Advanced Reports

What's changing

Workday improves CSV outputs for advanced reports by modifying the behavior of the Enable Preferred Currency option on the Advanced tab for currency fields.

Additional considerations

On the Create Custom Report or Edit Custom Report tasks, Workday changes the behavior of these options on the Columns tab for currency fields on advanced reports:

- Do Not Show if Empty.
- Show Currency Code Column.

When you select Do Not Show if Empty from the Options column, Workday now hides the preferred currency column if the column is all zeroes or empty.

When you select Show Currency Code Column from the Options column and the original currency amount column is hidden, Workday also hides the currency code column.

When you use the Schedule a Report task or select Notify Me Later when running an advanced report, the currency field options behave accordingly in the CSV output.

https://doc.workday.com/release-notes/en-us/anabiruntime/8729733.html

Automatically available

Worksheets Saved and Shared Private Filters

What's changing

You can now save the private filters you create in a workbook so that you can reuse them. You can also share filters and collaborate on customized views of data with anyone who has access to the workbook without impacting the work that others are doing.

Additional considerations

Workday adds Save As and Share options in the Related Actions menu for Private Filters. Once you save a Private Filter or convert it to a Shared Filter, you can Rename, Copy, or Delete it.

Workday adds the following options in the Filter menu:

Private Filter > Open Private Filter: Lists the Private Filters you've created.

What do I need to do

The ability to save and share private filters is available automatically.

https://doc.workday.com/release-notes/en-us/uxbi/8748210.html

Automatically available

Central Place for Managing Reporting Models

What's changing

Workday now enables you to view your model health and manage it from a central location.

What do I need to do

Nothing. The Manage Reporting Models page is available by default in Workday.

Additional considerations

- Create, edit, copy, or delete a reporting model.
- View individual model metrics.
- To edit, copy, delete, or set a default reporting model, you must first click OK on the Manage Reporting Models page. Then, use the related actions menu next to each reporting data model name.

What happens if I do nothing

Nothing happens.

https://doc.workday.com/release-notes/en-us/anafin/8711127.html

Historical Data in the Reporting Model

What's changing

Workday now enables you to report on 5 years of historical data in OfficeConnect for Financial Management.

By reporting on additional historical years, you can:

- Track historical trends.
- Support end-of-year closing.
- Do ad hoc historical analysis.

Additional considerations

You can now report on 5 years of historical data (3 more than previously) in OfficeConnect for Financial Management.

What do I need to do

Nothing. The additional historical years are available by default in the reporting model.

What happens if I do nothing

Nothing happens.

https://doc.workday.com/release-notes/en-us/anafin/8625545.html

View Reporting Model Configuration History Report

What's changing

Workday delivers a new View Reporting Model Configuration History report (secured to the Set Up: Financial Reporting and Analytics Data Model domain), enabling you to track configuration changes to the reporting model. This report is available to only OfficeConnect for Financial Management.

Additional considerations

You can use the Reporting Model Configuration History report to track any changes to the reporting model members including:

- Company.
- Ledger Accounts.
- Time.
- Currency.
- Versions.
- Effective Date.
- Dimensions.
- Show Details.

https://doc.workday.com/release-notes/en-us/anafin/8625544.html

View Reporting Model Configuration History Report, continued

What do I need to do

Nothing. The report is available by default in Workday

What happens if I do nothing

Nothing happens.

https://doc.workday.com/release-notes/en-us/anafin/8625544.html

Reporting Model Size Limit

What's changing

Workday now introduces a limit on the size of the reporting model that users can load in OfficeConnect for Financial Management.

What do I need to do

Nothing. The new limit is enforced during model load in OfficeConnect.

Additional considerations

Workday now supports a maximum of 750K dimension members for the entire reporting model. If your model exceeds this limit, end users can't successfully load it in OfficeConnect.

What happens if I do nothing

If your reporting model exceeds the size limit, it fails to load in OfficeConnect. An administrator must reduce the model size by either:

- Removing a large dimension.
- Selecting a lower level in the dimension hierarchy.

https://doc.workday.com/release-notes/en-us/doc/8711100.html

Support for Additional Languages in Prism Analytics

What's changing

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

Additional considerations

Workday now supports these new languages:

- French (Canada).
- Korean.
- Japanese.

These UI elements are are kept in their original language:

- Tenanted data.
- Tenanted fields (custom field names).
- Date formatting.

https://doc.workday.com/release-notes/en-us/prism/8738301.html

Support for Additional Languages in Prism Analytics, continued

What do I need to do

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

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

What happens if I do nothing

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

https://doc.workday.com/release-notes/en-us/prism/8738301.html

Prism Task URL

What's changing

Workday updates our task and reports as part of an internal code refactor.

What do I need to do

If you have any of these tasks saved, you must update the URL.

Additional considerations

As part of an internal code refactor for the Delete Published Rows task Workday:

- Changes the URL for the task.
- Improves the table UI for enhanced legibility.

What happens if I do nothing

Any existing links to these tasks will no longer work.

https://doc.workday.com/release-notes/en-us/prism/8753904.html

Prism Calculated Field Expression Validation

What's changing

Workday adds more validation checks of boolean expressions in Prism calculated fields.

Additional considerations

With this release, Workday displays an error in a dataset for these invalid boolean expressions in a Prism calculated field:

Expressions that use the LIKE comparison operator with any of these field types or values:

- Boolean.
- Currency.
- Double.
- Integer.
- Long.
- Numeric.

Expressions that use the IN comparison operator with Currency fields or values.

https://doc.workday.com/release-notes/en-us/prism/8732588.html

Prism Calculated Field Expression Validation, continued

Additional considerations

Note that Workday supports using:

The LIKE comparison operator with Text values only.

The IN comparison operator when the field type is identical on both sides of the operator.

Example: These Prism calculated field expressions now display an error:

- [Current Salary] LIKE [Previous Salary].
- [Policy Number] LIKE [Additional Policy Number].
- [Current Salary] IN [Previous Salary].

https://doc.workday.com/release-notes/en-us/prism/8732588.html

Automatically available

Prism Calculated Field Expression Validation, continued

What do I need to do

Verify that no Prism calculated field contains an invalid expression.

You can view all field errors in a dataset lineage to look for any errors that might be due to an invalid boolean expression. Access the View Dataset Lineage report for the most downstream dataset, and Select Download > Calculated Field Expressions. Open the unzipped CSV file and review the Field Error column for any errors. Fix any invalid expressions if necessary.

See the Administrator Guide links under Related Information for more information on boolean expressions.

What happens if I do nothing

If a dataset contains an invalid boolean expression, then any downstream dataset publish or data change task will fail to run.

https://doc.workday.com/release-notes/en-us/prism/8732588.html

Google BigQuery Connections for Data Change Tasks

What's changing

Workday enables you to create a Google Cloud BigQuery connection that you can use in a data change task, making it easier to bring in external data from additional sources.

Additional considerations

You can now create connections from Prism Analytics to Google Cloud BigQuery so that you can use them to load data into a table using a data change task.

When you create a BigQuery connection, you:

Specify a Google Cloud project ID to use for billing all data queries against.

Specify a Google Cloud service account key to authenticate as. You must create the service account key using JSON.

Can optionally specify an additional service account email to impersonate that account for permissions.

https://doc.workday.com/release-notes/en-us/prism/8729537.html

Google BigQuery Connections for Data Change Tasks, continued

Additional considerations

When you migrate a BigQuery connection between tenants, Workday doesn’t migrate the service account key to protect your security. As a result, you must copy and paste the JSON of the service account key in the BigQuery connection in the target tenant.

BigQuery connections define how to connect to BigQuery, but they don’t specify what data to retrieve. Instead, when you use the connection in a data change task, you define the data to bring. You can select a table using the UI or enter a SQL SELECT statement.

https://doc.workday.com/release-notes/en-us/prism/8729537.html

Google BigQuery Connections for Data Change Tasks

What do I need to do

To bring BigQuery data into Prism Analytics, create a BigQuery connection and use it in a data change task.

What happens if I do nothing

No change in existing behavior. Existing data change tasks, connections, and tables continue to work as they did previously.

https://doc.workday.com/release-notes/en-us/prism/8729537.html

Join Stage Join Types

What's changing

Workday continues to improve the Join Stage task by adding a new Join Type.

What do I need to do

No action is needed to use this feature.

Additional considerations

You can now select a Left Anti Join or Right Anti Join as a join type in a Join Stage, enabling you to quickly return only the values that do not match.

What happens if I do nothing

There is no change.

https://doc.workday.com/release-notes/en-us/prism/8733019.html

Automatic Rerun for Failed Data Change Tasks

What's changing

Workday now automatically tries to rerun data change tasks up to 3 times if they encounter certain errors.

What do I need to do

No action is needed to use this feature.

Additional Considerations

If a data change task encounters an error related to service unavailability, Workday now automatically attempts to rerun in 5 minutes, up to 3 times.

What happens if I do nothing

There is no change.

https://doc.workday.com/release-notess/en-us/prism/8523632.html

Prism Count Distinct Performance Enhancements

What's changing

With this release, Workday improves the performance of count distinct aggregations on Prism data sources.

What do I need to do

Workday suggests refreshing your Prism data.

Additional considerations

Workday improves performance.

What happens if I do nothing

Your count distinct aggregations might not reflect the most up-to-date values.

https://doc.workday.com/release-notes/en-us/anabiruntime/8749815.html

Financial Management – Accounting and Finance

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Write Off Customer Invoices with VAT on Payment

What’s changing

Workday further streamlines your customer write-off process by now automatically reversing tax when you write off customer invoices with balancing worktags and value-added tax (VAT) on payment enabled.

Additional considerations

Workday updates our processing logic to now automatically recalculate tax amounts when you write off customer invoices with balancing worktags and VAT on payment enabled.

You can now view the tax journal lines when you access the View Accounting for Customer Transaction task from the customer invoice write-off.

What do I need to do

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

https://doc.workday.com/release-notes/en-us/fintax/8433120.html

Tax Accounting for Customer Invoice Adjustments

What's changing

When you apply adjustments to customer invoices with balancing worktags and value-added tax (VAT) on payment enabled to decrease the amount due from a customer, Workday now reverses the corresponding tax amounts on the customer invoice applications.

Additional considerations

Workday updates our processing logic so that when you apply adjustments to decrease the amount due from a customer on customer invoices with balancing worktags and VAT on payment enabled, we now reverse tax accounting entries on customer invoice application journals.

https://doc.workday.com/release-notes/en-us/fintax/8764936.html

Put Worktags Tax Rule SOAP Web Service

What's changing

Workday updates the Put Worktags Tax Rule web service in v44.0 to now enable you to add or update specific lines for worktag transaction tax rules without reloading all of your unchanged lines

Additional considerations

Workday adds a new Replace All field on the Put Worktags Tax Rule web service, which you can set to:

- True for Workday to replace all lines for the worktag transaction tax rule.
- False for Workday to only update existing lines or add new lines.

Workday also delivers new validations on the Put Worktags Tax Rule web service to support the new option.
See the SOAP API Change Log link under Related Information.

https://doc.workday.com/release-notes/en-us/fintax/8601462.html

Automatically available

Address Tax ID Update

What's changing

Workday now expands the list of countries you can add tax details at address level to include:

- France.
- Mexico.
- Philippines.

Additional considerations

Address Tax ID

When an Address Tax ID is in use, you can no longer update the tax status.

Tax ID Type

The same Tax ID Type can have the same active Tax Identification Number as long as each Tax Identification Number has a different tax status.

Enable Tax Details by Address

You can now configure tax details by address for these tax ID types:

- RFC.
- TIN.
- SIRET.

https://doc.workday.com/release-notes/en-us/fintax/8673925.html

Automatically available

Address Tax ID Report Fields

What's Changing

Workday expands the functionality of some report fields to now return results for address level tax IDs as well as country level.

Additional Considerations

Workday updates these report fields to now return results for Address Level Tax IDs as well as Country Level Tax IDs:

- Company Tax IDs report field on the Taxable Document business object (secured to the Public Reporting Items domain).
- Customer Tax IDs report field on the Customer Invoice Document business object (secured to the Access Customer (Segmented) domain).
- Supplier Tax IDs report field on the Supplier Invoice Document business object (secured to the Access Supplier (Segmented) domain).
- Supplier Transaction Tax ID report field on the Supplier Invoice Document business object (secured to the Access Supplier (Segmented) domain).
- Tax ID for Selected Supplier report field on the Supplier business object (secured to the Reports: Supplier and View: Supplier domains).
- Tax ID report field on the Abstract Tax Rate Application business object (secured to the Public Reporting Items domain).

https://doc.workday.com/release-notes/en-us/fintax/8673937.html

Address Tax ID Report Fields, continued

Additional Considerations

Workday now secures the Edit Customer Tax Information task to the Set Up: Tax domain to enable tax managers to access tax information for customers and suppliers they have access to.

For a better user experience, Workday now adds Inactive to the names of inactive address tax IDs.

You can now drill into the Address Tax ID field on the View Address Tax ID task (secured to the Set Up: Company General and Set Up: Tax domains) to view:

- Identification Number.
- Tax Status.
- Addresses Assigned.

https://doc.workday.com/release-notes/en-us/fintax/8673937.html

Worktags for Expense Journal Lines

What's Changing

You can now view these worktags for spend lines when accounting is generated for expense reports with tax:

- Tax Applicability.
- Tax Code.

Additional Considerations

Workday adds these worktags for Spend Journal Lines generated for Expense Reports:

- Tax Applicability.
- Tax Code.

https://doc.workday.com/release-notes/en-us/fintax/8784749.html

Financial Management – Accounting Center

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Support for Multiple Transaction Currencies in Accounting Center

What's changing

Workday now enables you to process transactions that use multiple transaction currencies. You no longer have to use the same transaction currency for all journal lines created from a transaction.

Additional considerations

Workday now removes a validation that prevents you from processing transactions with more than a single transaction currency.

Workday now displays this error: Transaction debits must equal transaction credits only when there is a single transaction currency.

Workday now applies rounding adjustments on valid multicurrency transactions in these scenarios:
Transaction amount total debits equals total credits for all journal lines with the same transaction currency or transaction currency group.

Ledger amount has not been overridden for any journal line within the transaction currency group.

https://doc.workday.com/release-notes/en-us/finac/8529044.html

Support for Multiple Transaction Currencies in Accounting Center, continued

Additional considerations

Note: A transaction with multiple transaction currencies can have a rounding adjustment applied to more than one journal line.

https://doc.workday.com/release-notes/en-us/finac/8529044.html

Support for Multiple Transaction Currencies in Accounting Center, continued

What do I need to do

To ensure total ledger debits equal credits, you should provide ledger amounts for your transactions if total transaction debits don’t equal credits in a common currency.

To ensure you can generate a balanced journal entry in alternate ledger currency, you should verify total transaction debits equal credits if alternate ledger currency is enabled for the company that you are generating accounting.

What happens if I do nothing

Your transaction processing will continue as usual.

https://doc.workday.com/release-notes/en-us/finac/8529044.html

Automatically available

Accounting Source Analytics Data Source Security Configuration

What's changing

With the 2025 R1 release, Workday enables you to make bulk updates to the Prism Data Source security configuration for all reportable tables and datasets for an accounting source. You no longer have to access and run the Edit Data Source Security task for each table and dataset individually. You can now use a single task to change the reporting permissions for each table and dataset in an accounting source.

Additional considerations

Edit Accounting Source Prism Data Source Security Task

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

View Accounting Source Prism Data Source Security Report

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

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

Access to Prism Data in Accounting Center

What's changing

With Workday 2025 R1, Workday is modifying how you access Prism data in Accounting Center for processing batches and resolving errors. You only need access to the respective Accounting Center security domain for the task without also needing access to the Prism Data Sources of the Accounting Source tables and datasets.

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

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

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

Additional considerations

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

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

Financial Management - Accounts Payable

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Automatically available

Supplier Invoice Pop Out for Attachment Previewer

What’s changing

Workday now enables you to undock the supplier invoice attachment previewer to a separate window.

Additional considerations

Workday delivers a new Undock to new window option on your supplier invoice attachments when editing a Workday invoice, enabling you to view the attachment in a new browser window.

When you undock your supplier invoice attachment, select the Dock to right option to return the attachment to your split screen view.

This browser window closes when you finish editing your Workday invoice.

Note: This feature is not available for mobile.

https://doc.workday.com/release-notes/en-us/uiplatform/8760765.html

Supplier Invoice Pop Out for Attachment Previewer, continued

What do I need to do

Ensure the Split Screen Default Option field on the Edit Tenant Setup - Financials task is configured to Always Expanded.

Edit a supplier invoice or supplier invoice adjustment with 1 or more attachments. On the attachment previewer, select the Undock to new window option to open the attachment in a new browser window.

Select the Dock to right option to return the attachment to a split screen view in the same browser window as your Workday invoice.

What happens if I do nothing

Nothing. This feature is automatically available for supplier invoice attachment previews.

https://doc.workday.com/release-notes/en-us/uiplatform/8760765.html

Automatically available

Historical Match Exception CRFs for Supplier Invoices

What's changing

With this release, Workday stores and displays additional information for match exceptions that helps to improve reporting on match exceptions for supplier invoices.

Additional considerations

Workday delivers these new match exception CRFs (class report fields) to store and display additional information about match exceptions:

- All Previous Match Exception Reasons.
- Matching Triggered By.
- Previous Header Match Exception Reasons.
- Previous Line Match Exception Reasons.
- Supplier Accounts Match Process Events.

https://doc.workday.com/release-notes/en-us/finsa/8641568.html

Historical Match Exception CRFs for Supplier Invoices, continued

Additional considerations

Workday also updates the names and descriptions of these three match exception CRFs:

- All Match Exception Reasons is now named All Current Match Exception Reasons.
- Header Match Exception Reasons is now named Current Header Match Exception Reasons.
- Line Match Exception Reasons is now named Current Line Match Exception Reasons.

https://doc.workday.com/release-notes/en-us/finsa/8641568.html

Historical Match Exception CRFs for Supplier Invoices, continued

What do I need to do

You don't need to do anything to uptake this feature; the new CRFs are automatically available to you in Workday reports. Setup is only required when you want to use the CRFs in your own custom reports.

What happens if I do nothing

If you do nothing, you can still use the new CRFs in Workday reports. If you want to use the CRFs in your own custom reports, you need to set up the reports.

https://doc.workday.com/release-notes/en-us/finsa/8641568.html

Supplier Invoice Work Area Improvements

What's changing

Workday delivers various enhancements to the Supplier Invoice Work Area that improve usability of columns, search criteria, button appearance, and labeling.

Additional considerations

Workday delivers various enhancements to the Supplier Invoice Work Area that improve usability of columns, search criteria, button appearance, and labeling, among others. Workday makes these usability improvements to these supplier accounts tasks in the Supplier Invoice Work Area:

- The Edit button is no longer cut off on the Purchase Order Override task.
- We add fields to make purchase order line mapping easier.
- We add a due date to the Edit Supplier Invoice and Create Supplier Invoice tasks.

https://doc.workday.com/release-notes/en-us/finsa/8736574.html

Supplier Invoice Work Area Improvements, continued

Additional considerations

You can now save for later without a spend category or item on the Create Adjustment Supplier Invoice and Edit Supplier Invoice Adjustment tasks.

Workday improves screen responsiveness to resizing.

Workday adds a Liability label to the Increase Liability and Decrease Liability selections on the Create Adjustment Supplier Invoice and Edit Supplier Invoice Adjustment tasks. Previously there was no Liability label, only the radio buttons.

Text and sections are more responsive to resizing application windows.

Workday improves spacing on Work Queue Information to make it easier for you to read.

https://doc.workday.com/release-notes/en-us/finsa/8736574.html

Supplier Invoice Work Area Improvements, continued

What do I need to do

You don't need to do anything to uptake these changes. These usability improvements to Supplier Accounts are automatically available.

What happens if I do nothing

You are still able to use these enhancements even if you do nothing.

https://doc.workday.com/release-notes/en-us/finsa/8736574.html

Automatically available

Header Field Highlighting for Workday Scanned Supplier Invoices

What's changing

With this release, Workday delivers additional features for Supplier Invoice Scanning (OCR) by highlighting equivalent header fields between your scanned invoice PDF and Workday invoice.

Additional considerations

When you enable Workday OCR for supplier invoices, Workday now displays corresponding annotations in the Workday invoice and scanned invoice PDF when you edit a scanned supplier invoice or supplier invoice adjustment.

You can:

- Use the new Scanned Highlights toggle switch on the scanned PDF to hide or display the annotations.
- Hover over an annotation in the Workday invoice to display a border around the scanned PDF field.
- Hover over an annotation in the scanned PDF to highlight the corresponding field on the Workday invoice.
- Select an annotation in either the Workday invoice or scanned PDF, and Workday takes you to the equivalent field in the corresponding invoice.

https://doc.workday.com/release-notes/en-us/finsa/8616332.html

Header Field Highlighting for Workday Scanned Supplier Invoices, continued

What do I need to do

Set up OCR for Supplier Invoices and configure for PDF file extensions. See link in Related Information.

Note: This feature is only enabled for scanned PDF file extensions.

What happens if I do nothing

Create a supplier invoice through Workday supplier invoice scanning, and edit the invoice.

Workday displays field annotations and interactive highlights in the scanned PDF attachment by default. Select the Scanned Highlights toggle switch to hide these features.

Hover over an annotation to display a border around the scanned PDF field. Select an annotation in either invoice to go the equivalent field in the corresponding invoice.

https://doc.workday.com/release-notes/en-us/finsa/8616332.html

Supplier Accounts Hub Enhancements

What's changing

With this release, Workday delivers additional features to the Supplier Accounts Hub.

Additional considerations

Workday adds the Create Supplier Down Payment Invoice task to the Tasks card in the Overview section. Workday doesn't display this task when you enable worktag balancing for your tenant. By default, Workday includes this task in the Suggested Links section regardless of worktag balancing configuration.

Workday now includes a filter side panel on the Manager Metrics section, and remove the filter from the Overview section. Workday also adds a statement to the Manager Metrics subsections, informing you that the date filter defaults to the last 3 months and is based on the invoice creation date.

https://doc.workday.com/release-notes/en-us/finsa/8616067.html

Automatically available

Supplier Accounts Hub Enhancements, continued

What do I need to do

Configure domain security to access the Supplier Account Hub. See the 2024R2 Release Note link in the Related Information section.

https://doc.workday.com/release-notes/en-us/finsa/8616067.html

View Purchase Order Line Due Date on Purchase Order Override Task

What's changing

Workday adds a Due Date field to the Select Purchase Order Lines to be added tab in the Purchase Order Override task.

Additional considerations

Workday adds a view-only Due Date column to the Select Purchase Order Lines to be added tab on the Purchase Order Override task. The Due Date column is filterable and sortable and only displays if you specify a due date for the purchase order.

Note: the Due Date column doesn't display on the:

- Edit Supplier Invoice task.
- Select invoice Lines to Keep tab of the Purchase Order Override task.

https://doc.workday.com/release-notes/en-us/finsa/8482499.html

View Purchase Order Line Due Date on Purchase Order Override Task, continued

What do I need to do

You don't need to do anything to uptake this feature.

What do I need to do

You still see the Due Date column on the Select Purchase Order Lines to be Added tab of the Purchase Order Override task.

https://doc.workday.com/release-notes/en-us/finsa/8482499.html

cognizant

Data Stamping on Supplier Invoices

What's Changing

Workday permanently stores legally required information from supplier invoice fields.

Additional Considerations

Workday delivers these updates to support the storage of information from supplier invoice fields:

- A Remit-to-Address report field to enable you to report on this field when the remit-to-address is different from the supplier's address.
- A Supplier Invoices as of Approval Date relational data source to enable you to report on supplier invoices approved before or after a date you specify.

Note: You must use this relational data source in a report to view the original information, as of the approval moment, for supplier invoice fields. (Workday returns all values as of the most recent approval of the supplier invoice.)

https://doc.workday.com/release-notes/en-us/finsa/8406828.html

Data Stamping on Supplier Invoices, continued

Additional Considerations

If you make changes to these fields after invoice approval, you still see the updated information on the View Supplier Invoice task.

The Supplier Invoices as of Approval Date relational data source is secured to these security domains:

- Reports: Supplier Accounts.
- Process: Supplier Invoice – Reporting.

https://doc.workday.com/release-notes/en-us/finsa/8406828.html

Data Stamping on Supplier Invoices, continued

What do I need to do

This feature is automatically available; you don't need to do anything to uptake this feature.

What happens if I do nothing

You see these changes in Workday:

- A new Remit-to-Address report field.
- A new Supplier Invoices as of Approval Date relational data source.

https://doc.workday.com/release-notes/en-us/finsa/8406828.html

Financial Management – Accounts Receivable

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Automatically available

Prevent Update Conflicts for Customer Payment Auto-Application Task and Web Services

What’s changing

With this release, Workday prevents update conflicts when you use the Customer Payment Auto-Application task in parallel with the Submit Customer Invoice web service or Submit Customer Invoice Adjustment web service.

Additional considerations

When you use the Customer Payment Auto-Application task to write off an invoice or apply an invoice credit while you use web services to create customer invoice or customer invoice adjustments, the Customer Payment Auto-Application job now only processes the invoices or adjustments before the Write-Off rule or Invoice Credit rule starts.

What do I need to do

Nothing. This release note informs you about performance improvements and you don't need to take any action.

What happens if I do nothing

There is no impact.

https://doc.workday.com/release-notes/en-us/fincust/8606451.html

Customer/Sponsor for Transaction Report Field

What's changing

With this release, Workday updates the Customer/~Sponsor~ for Transaction report field that you can use in custom reports.

Additional considerations

Workday updates the Customer/~Sponsor~ for Transaction report field on the Customer business object to now return the customer or sponsor for the first customer payment listed on the customer deposit when your customer deposit is tied to multiple customer payments.

You can use this report field in custom reports..

What do I need to do

Nothing. This feature is automatically available.

https://doc.workday.com/release-notes/en-us/fincust/8634302.html

Automatically available

Local Commodity Codes on Invoice Lines

What's changing

With this release, Workday enables you to select active commodity codes on the invoice lines for customer invoices, invoice adjustments, and cash sales without the need to populate sales items first.

Additional considerations

You can now select active commodity codes on the Commodity Code prompt in the Invoice Lines grid on these tasks:

- Create Customer Invoice.
- Create Customer Invoice Adjustment.
- Record Cash Sale.

Workday also enables you to update commodity codes when you edit, change, review, revise, or correct the invoice lines originating from these tasks.

To enable the Commodity Code prompt, you:

- No longer need to populate a sales item in the grid.
- Must configure commodity code types and add commodity codes in your tenant.

https://doc.workday.com/release-notes/en-us/fincust/8437210.html

Local Commodity Codes on Invoice Lines, continued

Additional considerations

You can select only 1 active code per commodity code type.

For v43.0, Workday updates these web services to no longer return an error when you add active commodity codes that aren't associated with sales items:

- Bulk Import Customer Invoice.
- Import Customer Invoice.
- Submit Cash Sale.
- Submit Customer Invoice.
- Submit Customer Invoice Adjustment.
- See the SOAP API Change Log link under Related Information.

https://doc.workday.com/release-notes/en-us/fincust/8437210.html

Local Commodity Codes on Invoice Lines, continued

What do I need to do

Nothing. This feature is automatically available.

What happens if I do nothing

If you don’t configure commodity code types and codes in your tenant, you can't select the codes when you create customer invoices, invoice adjustments, or cash sales.

https://doc.workday.com/release-notes/en-us/fincust/8437210.html

Automatically available

View Intercompany Receipt Fields

What's changing

With this release, Workday updates the View Intercompany Receipt report to include additional fields and data.

Additional considerations

Workday now adds these new fields on the View Intercompany Receipt report:

- Intercompany Payment.
- Intercompany Invoice Type.

Workday also displays transaction IDs in the Transaction field in the Intercompany Items grid of the report Access.

The changes are available for these types of intercompany receipts:

- Direct.
- On Behalf Of.

Workday delivers a new Amount Applied field in the Intercompany Items grid of the report that Workday displays for the direct intercompany receipts.

https://doc.workday.com/release-notes/en-us/fincust/8529833.html

View Intercompany Receipt Fields, continued

Additional considerations

Workday delivers these new report fields on the Intercompany Receipt business object (secured to the Public Reporting Items domain) that you can use in custom reports to view the intercompany invoice and payment information:

- Intercompany Invoice Type.
- Intercompany Payment.

https://doc.workday.com/release-notes/en-us/fincust/8529833.html

View Intercompany Receipt Fields, continued

What do I need to do

Nothing. This feature is automatically available.

https://doc.workday.com/release-notes/en-us/fincust/8529833.html

Automatically available

Bank Accounts Associated to Company Hierarchy for Workday Bank Connectivity

What's changing

With this release, Workday adds support for company hierarchy-owned bank accounts for Workday Bank Connectivity. You can now integrate hierarchy-owned bank accounts by specifying the legal owning company. Workday uses this company as referential data for the Kyriba system.

Additional considerations

Legal Owning Company Field

Workday now displays a new Legal Owning Company field on these bank account tasks when you select a company hierarchy as the organization:

- Create Bank Account.
- Edit Bank Account.

You can now select a company in the hierarchy as the owning company for the bank account. Workday uses this company as referential data to integrate company-hierarchy owned accounts in the Kyriba system.

https://doc.workday.com/release-notes/en-us/fincsh/8428675.html

Bank Accounts Associated to Company Hierarchy for Workday Bank Connectivity, continued

Additional considerations

Bank Account Web Services

Workday updates these web services to support the new Legal Owning Company field when you specify a company hierarchy as the organization for a bank account:

- Get Bank Account.
- Put Bank Account.
- Submit Bank Account.

Bank Account Business Processes

Workday now displays the new Legal Owning Company field on these business processes when you select a company hierarchy as the organization for a bank account:

- Review Bank Account.
- Revise Bank Account.

https://doc.workday.com/release-notes/en-us/fincsh/8428675.html

Bank Accounts Associated to Company Hierarchy for Workday Bank Connectivity, continued

Additional considerations

Legal Owning Company Report Field

Workday delivers a new Legal Owning Company report field on the Bank Account business object that you can use in condition rules and custom reports to view the owning company for the bank account. The report field is secured to these domains:

- Process: Bank Reconciliation.
- Reports: Banking.
- Set Up: Bank Entity.

https://doc.workday.com/release-notes/en-us/fincsh/8428675.html

Automatically available

Submit Ad Hoc Bank Transaction SOAP Web Service

What's changing

Workday updates the Submit Ad Hoc Bank Transaction SOAP web service to enhance resiliency and improve user experience.

Additional considerations

Workday updates the v44.0 Submit Ad Hoc Bank Transaction web service to now allow a maximum of 1000 transaction lines per request.

See the SOAP API Change Log link under Related Information.

What do I need to do

Ensure your requests are limited to a maximum of 1000 transaction lines. Workday recommends you use the Import Ad Hoc Bank Transaction web service for larger volumes of transaction lines.

What happens if I do nothing

Requests with more than 1000 lines will be rejected.

https://doc.workday.com/release-notes/en-us/fincsh/8000975.html

Custom Business Process Notifications for Customer Documents

What’s changing

With this release, you can now configure repeat on condition rules in custom notifications for your customer invoices, statements, and dunning letters. This enables you to easily email customer documents from multiple email addresses.

Note: To use this functionality for customer documents, you must set up a custom email delivery configuration on the Create Email Configuration task.

Additional considerations

When there’s a report field in the Related Instances prompt on these custom business process notification tasks and report, Workday now displays a new Repeat On Conditions and Rules section:

- Copy Workflow Notification.
- Create Workflow Notification.
- Delete Workflow Notification.
- Edit Workflow Notification.
- View Workflow Notification.

The Repeat On Conditions and Rules section enables you to view, select, or create condition rules to filter related instances for the external fields, only sending notifications for the filtered instances.

https://doc.workday.com/release-notes/en-us/fincust/7651938.html

Custom Business Process Notifications for Customer Documents, continued

Additional considerations

Note: You can't create a new repeat on condition rule on the Create Workflow Notification task.

The Repeat On Conditions and Rules section is available on these business processes:

- Consolidated Invoice Email.
- Customer Invoice Email.
- Customer Statement.
- Dunning Letter Email.

On the business process definition, you can easily view when a custom notification is configured with a repeat on condition rule on the Notifications tab.

https://doc.workday.com/release-notes/en-us/fincust/7651938.html

Custom Business Process Notifications for Customer Documents, continued

Additional considerations

When there's a configuration, Workday now displays a new Repeat On Condition column and the rule in the column on the:

- Custom Notifications grid.
- Maintain Custom Notifications grid when you click Maintain Custom Notifications.

In the Notification column in the above 2 grids, you can select the related actions menu of the magnifying glass icon to view the Workflow Notification pop-up box. In the pop-up box, Workday now displays a Repeat on Condition(s) grid with the rule only when a repeat on condition rule is configured for the custom notification.

https://doc.workday.com/release-notes/en-us/fincust/7651938.html

Custom Business Process Notifications for Customer Documents, continued

What do I need to do

To send customer documents from different email addresses, set up a custom email delivery configuration on the Create Email Configuration task.

Update the custom business process notifications and create the repeat-on conditions and rules.

Configure the repeat on condition rule to add report fields based on the print run group business object for your customer document.

What happens if I do nothing

If you don’t configure the Repeat On Conditions and Rules section in custom notifications for these business processes, your email process for customer documents remains the same:

- Consolidated Invoice Email.
- Customer Invoice Email.
- Customer Statement.
- Dunning Letter Email.

https://doc.workday.com/release-notes/en-us/fincust/7651938.html

Workday Docs for Layouts for Customer Statements

What's changing

With this release, you can add custom business form layouts based on Workday Docs for Layouts when you create or edit customer statement print layouts.

Additional consideration

Workday updates the Business Form Layout prompt on the Create Customer Statement Print Layout and Edit Customer Statement Print Layout tasks to now:

- Rename the All Custom Business Forms using Report Design prompt filter to All. Consider creating a Dashboards folder to place shared reports designed for use in dashboards.
- Include all custom business forms that use Report Designer and Docs for Layouts on this prompt filter.

You can view the selected business form layout on the View Customer Statement Print Layout report.

https://doc.workday.com/release-notes/en-us/fincust/7606082.html

Workday Docs for Layouts for Customer Statements, continued

What Do I Need to Do

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

What happens if I do nothing

The users will see the new document layouts on the customer statement print layout tasks and report.

https://doc.workday.com/release-notes/en-us/fincust/7606082.html

Financial Management – Close and Consolidate

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Revaluation Enhancements

What's changing

Workday updates the Run Revaluations business process to address resiliency and usability.

Additional considerations

Workday updates the Run Revaluation business process to be more resilient when generating larger volumes of resulting lines. You may now see child processes when viewing your business process event.

Workday no longer generates events for revaluation results with zero lines. Workday still creates events for revaluation results generated before the delivery of this feature.

What do I need to do

Nothing! This release note informs you about improved tenant health and you don't need to take any action.

https://doc.workday.com/release-notes/en-us/fincls/8002342.html

Financial Management – Endowments

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Automatically available

Attachments Report Fields for Endowments

What's changing

Workday adds new report fields that enable you to view attachments that you've previously uploaded on endowment business objects.

Additional considerations

Workday adds an Attachments report field on these business objects (secured to the Public Reporting Items domain):

- Donor Contribution.
- Gift.
- Investment Statement.

Workday also adds a Secured Attachments report field on the Gift business object (secured to the Set Up: Endowments Secured Attachments domain)

https://doc.workday.com/release-notes/en-us/finendow/8743304.html

Role Assignments on Inactive Gifts and Gift Hierarchies

What's changing

Workday updates the visibility of role assignment removal on inactive gifts and gift hierarchies.

Additional considerations

Workday updates the Inactivate Gift and Inactivate Gift Hierarchy tasks so that:

- When you select the Keep Role Assignment check box, we now change inherited role assignments to explicit role assignments.
- The Role Assignment Snapshots for Role Assignee report no longer includes rows for role assignments on gift or gift hierarchies that you inactivate after the update.
- The Security History for User report now shows revoked security on gifts and gift hierarchies that you inactivate after the update.

https://doc.workday.com/release-notes/en-us/finendow/8436916.html

Financial Management – Grants Management

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Financial Reporting for Award Spending

What's changing

Workday widens the date ranges for report data source (RDS) filters on the Journal Lines for Financial Reporting RDS to now return journal lines that fall outside of award schedules.

Additional Considerations

Report Data Source Filters:

Workday updates these report data source (RDS) filters on the Journal Lines for Financial Reporting RDS to now return journal lines that fall outside the periods on your award schedules when you select Award Life or Award Life to Date reporting time periods:

- Award, Financial, Position, and Project Journal Lines for Company and Reporting Time Period.
- Award, Financial, Position, and Project Journal Lines for Organization and Reporting Time Period.
- Award Journal Lines for Award Header and Line Roles and Reporting Time Period.
- Award Journal Lines for Award Organization and Reporting Time Period.

https://doc.workday.com/release-notes/en-us/fingrt/8624911.html

Financial Reporting for Award Spending, continued

Additional Considerations

- Award Journal Lines for Company and Reporting Time Period.
- Award Journal Lines for Org Role and Reporting Time Period.
- Award Journal Lines for Organization and Reporting Time Period.

When you filter by Award Life reporting time periods, Workday now returns journal lines for all expenditures with accounting dates between 1900-01-01 and 9999-12-31. When you don’t enter a report effective date, Workday now applies a report effective date of 9999-12-31.

When you filter by Award Life to Date reporting time periods, Workday now returns journal lines for all expenditures with accounting dates between 1900-01-01 and the end date of the period that you select.

https://doc.workday.com/release-notes/en-us/fingrt/8624911.html

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Financial Reporting for Award Spending, continued

Additional Considerations

Balances for Pre- and Post-Award Expenditures:

Reports based on the Journal Lines for Financial Reporting RDS include additional expenditures in the:

- First period report balance, when their accounting date is before the award start date.
- Last period report balance, when their accounting date is after the award end date.

Note:

When you select Award Year to Date reporting time periods, the RDS filters continue to only return journal lines within the award schedule

https://doc.workday.com/release-notes/en-us/fingrt/8624911.html

Financial Reporting for Award Spending, continued

What do I need to do

To ensure your financial reports on awards continue to provide the information you need, Workday recommends reviewing custom reports based on the Journal Lines for Financial Reporting RDS after the update.

When balances in the first or last report periods increase, verify that the accounting dates on the additional expenditures fall outside your award schedule start and end dates.

What happens if I do nothing

As Workday widens the date ranges for RDS filters, financial reports on awards with expenses outside of the award schedule might return:

- Additional journal lines.
- Greater balances in the first and last report periods.

https://doc.workday.com/release-notes/en-us/fingrt/8624911.html

Copy Grant with Copy Award Line

What's Changing

Workday adds a new Copy Line and Copy Grant button, which you can access from award lines when you create, edit, correct, or amend awards. The new button enables you to copy grant information along with award lines, including grant hierarchy, related worktags, and role assignments. Workday creates new grants when you submit or save award changes for later.

Additional Considerations

Workday adds a new Copy Line and Copy Grant button on the Award Lines profile group on these tasks:

- Copy Award.
- Correct Award.
- Create Award.
- Create Award Amendment.
- Create New Award from Proposal.
- Edit Award.
- Edit Award Amendment.
- Edit Award Amendment from Amendment.
- Edit Award Correction.
- Review Award.

https://doc.workday.com/release-notes/en-us/fingrt/7692793.html

Copy Grant with Copy Award Line, continued

Additional Considerations

- Review Award Amendment.
- Review Award Correction.
- Revise Award.
- Revise Award Amendment.
- Revise Award Correction.

You must have access to 1 of these security domains for the button to display:

- Manage: Grant – Create.
- Set Up: Basic Grant Worktag.
- Set Up: Grants Management.

https://doc.workday.com/release-notes/en-us/fingrt/7692793.html

Copy Grant with Copy Award Line, continued

What do I need to do

Review the security of users who maintain awards. To view the new button, users need permissions to create grants.

What happens if I do nothing

Users with permissions to create grants will see a new Copy Line and Copy Grant button on award lines when they create, edit, correct, or amend awards.

https://doc.workday.com/release-notes/en-us/fingrt/7692793.html

Indexed Letter of Credit Drawdown Reporting Objects

What's changing

Workday prepares for the retirement of a report data source (RDS) on the Letter of Credit Draw Down business object and we deliver an indexed replacement RDS and RDS filter.

Additional Considerations

Indexed RDS and RDS Filter

Workday delivers a new Letter of Credit Drawdown Lines (Indexed) report data source (secured to the Reports: Award domain), which you can use in custom reports on letter of credit drawdowns.

Workday also delivers a new Letter of Credit Drawdown Lines for Company and Grant RDS filter on the Letter of Credit Drawdown Lines (Indexed) RDS, which you can use to filter letter of credit drawdown lines by company or company hierarchy and grant.

For increased performance, you can use the new RDS with the new RDS filter in custom reports instead of the Letter of Credit Draw Down Lines RDS.

https://doc.workday.com/release-notes/en-us/fingrt/7659108.html

Indexed Letter of Credit Drawdown Reporting Objects, continued

Additional Considerations

Note: When creating custom reports with the Letter of Credit Drawdown Lines for Company and Grant RDS filter, don't select the Optimized for Performance check box.

Letter of Credit Draw Down Lines RDS

In preparation for its future retirement, Workday now appends (Do Not Use) to the Letter of Credit Draw Down Lines RDS and we update its description.

Letter of Credit Draw Standard Report

To increase performance, Workday updates the Letter of Credit Draw standard report to now use the new Letter of Credit Drawdown Lines (Indexed) RDS.

https://doc.workday.com/release-notes/en-us/fingrt/7659108.html

Indexed Letter of Credit Drawdown Reporting Objects, continued

What happens if I do nothing

Custom reports using the Letter of Credit Draw Down Lines (Do Not Use) RDS continue to work, but you can no longer:

- Access the RDS directly.
- Create new reports from the RDS.

https://doc.workday.com/release-notes/en-us/fingrt/7659108.html

Grants Management Usability

What's changing

Workday adds column and grid names on these tasks:

- Create Award Schedule.
- Edit Award Schedule.
- Maintain Award Tasks.
- View Award Schedule.
- View Grant Hierarchy.

Additional Considerations

On the Create Award Schedule, Edit Award Schedule, and View Award Schedule tasks, Workday now displays names for the:

- Award Posting Interval Dates column.
- Fiscal Periods grid.

On the Maintain Award Tasks task, Workday now displays the name for the Award Tasks grid.

On the View Grant Hierarchy task, Workday now displays names for the:

- Staffing grid on the Staffing tab.
- Unavailable to Fill grid on the Unavailable to Fill tab.

https://doc.workday.com/release-notes/en-us/fingrt/8441068.html

Automatically available

Role Assignments on Inactive Grants and Grant Hierarchies

What's changing

Workday updates the visibility of role assignment removal on inactive grants and grant hierarchies.

Additional considerations

Workday updates the Inactivate Grant and Inactivate Grant Hierarchy tasks so that:

- When you select the Keep Role Assignment check box, Workday now changes inherited role assignments to explicit role assignments.
- The Role Assignment Snapshots for Role Assignee report no longer includes rows for role assignments on grants or grant hierarchies that you inactivate after the update.
- The Security History for User report now shows revoked security on grants that you inactivate after the update.

https://doc.workday.com/release-notes/en-us/fingrt/8170934.html

Removed Reliance on Single Legal Entity Profile for Award Line Company Selection

What's changing

Workday no longer requires a single legal entity profile setup between the award header company and the award line companies in a multicompany award. This enables you to create multicompany awards where the award line companies don't have a single legal entity relationship with the award header company.

Additional considerations

Tasks:

Workday updates these tasks to relax the single legal entity validation for award line company selection, enabling you to now select award line companies that don't have a single legal entity relationship with the award header company when you create an award:

- Amend Award.
- Copy Award.
- Correct Award.
- Create Award.
- Edit Award.
- Review/Revise Award (through the Award Event business process).

https://doc.workday.com/release-notes/en-us/fingrt/8266000.html

Removed Reliance on Single Legal Entity Profile for Award Line Company Selection, continued

Additional considerations

Workday still requires that you select award line companies that:

- Are intercompany affiliates that can initiate intercompany transactions with the award header company.
- Use the same account set as the award header company.
- Use the same currency as the award header company.

https://doc.workday.com/release-notes/en-us/fingrt/8266000.html

Removed Reliance on Single Legal Entity Profile for Award Line Company Selection, continued

What do I need to do

When you create, copy, edit, correct, or amend a multicompany award with award line companies that don't have a single legal entity relationship with the award header company, you will no longer see a validation message preventing you from submitting the award.

https://doc.workday.com/release-notes/en-us/fingrt/8266000.html

Financial Management – Payment Processing

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Automatically available

Bank Account Number Format Validators

What's changing

Workday enhances the Format Validator prompt on the Create Payee Bank Account Validation Override task by adding new filters that display country-specific validation attributes and all other validation attributes in your tenant.

Additional consideration

Workdays add these new filters to the Format Validator prompt in the Bank Account Number Options section of the Create Payee Bank Account Validation Override task:

- Workday Recommended.
- Other Validations.

You can select either Workday-recommended validation attributes for your specific country or all other validation attributes in your tenant for payee bank accounts.

https://doc.workday.com/release-notes/en-us/finset/8408953.html

Financial Management – Projects

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Automatically available

Project Phases and Tasks for Fixed Fee Customer Contract Lines, for Cost-Based % Complete

What's changing

You can add project phases and tasks on fixed fee project customer contract lines, enabling you to enter amounts at a more granular level, bill, and recognize revenue for multiple stages of a project, eliminating the need to create multiple projects. This capability already exists for:

- Project time and expense contract lines.
- Value-based project contract lines.
- Fixed fee project contract lines when percent complete is calculated by hours.

Workday now extends this capability to fixed fee project contract lines when percent complete is calculated by cost.

Additional considerations

Workday enables you to add 1 or more project phases and project tasks to fixed fee project contract lines when creating and maintaining customer contracts, for cost-based percent complete revenue recognition.

Workday updates the Review Percent Complete for Revenue task as follows:

- Add a new column Base Currency, which displays the base currency for the columns Estimated Cost and Actual Cost, and represents the project company currency.
- Rename the existing Currency column to Contract Currency, to differentiate it from the new Base Currency column.

https://doc.workday.com/release-notes/en-us/finrev/8380750.html

Project Phases and Tasks for Fixed Fee Customer Contract Lines, for Cost-Based % Complete, continued

What's changing

For this release, Workday supports phase and task granularity for percent complete configurations using these Estimated Cost Factor options:

- Baseline.
- Forecast.
- Manual Input.

Additional considerations

Workday extends the following web services to enable you to add project phases and tasks on fixed fee project customer contract lines, for cost-based percent-complete revenue recognition:

- Submit Percent Complete for Revenue.
- Submit Revenue Schedule.

Workday delivers a new report field on the Revenue Installment Line business object (secured to the Reports: Revenue domain) that you can use in custom reports:

- Percent Complete Line (The percent complete line that corresponds to the revenue installment line).

This report field only returns data for percent complete installments created on or after the 2020R1 release.

https://doc.workday.com/release-notes/en-us/finrev/8380750.html

Project Phases and Tasks for Fixed Fee Customer Contract Lines, for Cost-Based % Complete, continued

What do I need to do

- Enter project phases and tasks as needed on your fixed fee project customer contract lines.
- Configure your percent complete configurations using the Manage Percent Complete Configurations report.

What happens if I do nothing

If you choose to do nothing, you can continue to enter billable projects on your fixed fee project customer contract lines.

https://doc.workday.com/release-notes/en-us/finrev/8380750.html

Report Field - Worker Is Assigned or Associated

What's changing

Workday adds a new report field, Worker is Assigned or Associated, that returns a true or false value depending on whether a worker is assigned or associated to any project. It replaces the field Worker Projects - Do Not Use, which Workday plans to fully retire in a future release.

What do I need to do

Use the new report field in custom reports, and remove the retired field from any reports you currently use.

Additional considerations

Workday adds a new report field called Worker is Assigned or Associated, that returns true or false depending on whether a worker is assigned or associated to any projects. You can add the field to custom reports.

What happens if I do nothing

If you choose not to use the new report field in a new custom report, you'll notice no changes. If you continue using the retired field, it will no longer be available once it's removed.

https://doc.workday.com/release-notes/en-us/finprj/8755543.html

Project Budgets - Time and Expense for Phase and Task

What’s Changing

Workday enhances Project Budgets by enabling you to use time and expense contract lines to create revenue plan lines at the project phase and task level.

What do I need to do

Continue using contract rate sheets to create project budgets as usual.

Additional Considerations

For project budgets with a revenue calculation method of project time and expense and contract lines at the project phase or task level with the type time and expense, Workday now uses the corresponding contract rate sheet for the contract line at the most granular level for project phase or task to create the revenue plan line.

What happens if I do nothing

If you don't use contract rate sheets with project budgets, you won't notice any change.

https://doc.workday.com/release-notes/en-us/finprj/5996149.html

Enhance Schedule Project Budget Mass Update

What's Changing

Workday enhances the Schedule Project Budget Mass Update task by preventing multiple updates to the same project budget from running concurrently, ensuring that your project budgets remain accurate.

Additional Considerations

When you attempt to run the Schedule Project Budget Mass Update task while one of your project budgets is being updated, you will receive a validation message.

Additionally, if a scheduled update fails due to a concurrent update, the scheduler receives an Inbox notification in Workday.

What do I need to do

Continue using the Schedule Project Budget Mass Update task as usual.

What happens if I do nothing

If you don't use the Schedule Project Budget Mass Update task, you'll notice no changes.

https://doc.workday.com/release-notes/en-us/finprj/8329276.html

Human Capital Management – Advanced Compensation

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Automatically available

Infinite Scrolling on Compensation Review Grid

What's changing

Workday makes it easier to review compensation for large organizations by enabling infinite scrolling for any grids with over 50 rows and no subgrids.

Additional considerations

Workday has increased the limit on the Preferred Compensation Review Employee Awards Grid Limit on Edit Tenant Setup - HCM task from 500 to 2000.

Workday also adds these new mass actions to the Advanced tab on the Copy Standard Report to Custom Report task that you can use to increase custom search report results to 2000 rows:

- Compensation Review Organization Summary Mass Action for Data Paging: to enable planners of the process to view more than 500 employees in the search report.
- Compensation Review Process Search Employees Results Mass Action for Data Paging: to enable controllers and the Compensation Administrator to view more than 500 employees in the search report.

https://doc.workday.com/release-notes/en-us/hrcomprev/8428045.html

Infinite Scrolling on Compensation Review Grid, continued

Additional considerations

Workday strongly recommends that you use these mass action operations only when the organizations and the compensation review process meet the criteria for infinite scrolling. Workday enables infinite scrolling on the compensation review grid when both:

- From My Tasks, all employees in the organization are assigned no more than 1 plan of the same plan type.
- From the Search Results, all employees in the process are assigned no more than 1 plan of the same plan type.

https://doc.workday.com/release-notes/en-us/hrcomprev/8428045.html

Infinite Scrolling on Compensation Review Grid, continued

What do I need to do

Nothing, the change is automatically available.

What happens if I do nothing

Workday displays the compensation review grid for the first group of 50 rows. You can configure how many rows Workday displays on subsequent groups.

https://doc.workday.com/release-notes/en-us/hrcomprev/8428045.html

Human Capital Management – Benefits

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SOAP Import Web Services for Benefits

What's changing

Workday enhances the Import 1095-C Form Recipients Data web service (SOAP).

Additional considerations

Workday updates the Import 1095-C Form Recipients Data web service, enabling you to import data more quickly.

https://doc.workday.com/release-notes/en-us/hrbencore/8629798.html

Automatically available

Mobile Benefits UI Rearchitecture

What's changing

Workday transitions from an older mobile UI architecture to a new one for Benefits on the Workday mobile application.

Additional considerations

For Benefits on the Workday mobile app, Workday changes the UI appearance and presentation of information for workers. Workers will notice visual changes, but functionality remains the same for mobile enrollment.

Workday enhances accessibility in Benefits on mobile with a Generalized UI solution. New accessibility features include:

- Dynamic text resizing.
- Voice over and talk back.
- Translation to languages other than U.S. English (based on the user's profile settings).
- The Generalized UI solution will continue to be improved upon and kept up to date with new accessibility improvements.

https://doc.workday.com/release-notes/en-us/hrbenenroll/8008410.html

Mobile Benefits UI Rearchitecture, continued

What do I need to do

Nothing. This feature is automatically available.

What happens if I do nothing

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

https://doc.workday.com/release-notes/en-us/hrbenenroll/8008410.html

Human Capital Management – Compensation

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Administrator Security for Compensation

What's changing

Workday updates the security for certain reports to ensure that only administrators that are a part of business process compensation security policies or have access to appropriate compensation domains can see sensitive worker compensation information.

Additional considerations

Workday updates the security evaluation for these reports:

- Summary View.
- Compensation History.
- Compensation View External Student History by Category.
- View Worker History by Category.

https://doc.workday.com/release-notes/en-us/hrcomp/8552443.html

Administrator Security for Compensation, continued

What do I need to do

The changes are automatically available. However, you may need to configure security for certain administrators to restore or limit access to sensitive worker compensation information.

If your administrators need continued access to worker compensation information in the affected reports, you must grant them access to the effective position and the following security domains: Worker Data: Compensation by Organization, Worker Data: Stock Grants, and Worker Data: Period Activity Pay.

What happens if I do nothing

Some administrators may see changes in their access to sensitive worker compensation information.

https://doc.workday.com/release-notes/en-us/hrcomp/8552443.html

Percent-Based Commission Plans for MBT and Web Services

What’s changing

Workday expands percent-based commission plan functionality first delivered in Workday 2024R2. Workday enables percent-based commission plans to work with Manage by Basis Total (MBT) compensation.

Workday also updates web services to support percent-based commission plans.

Additional considerations

Workday updates the MBT calculation to support the inclusion of percent-based commission plans. Workday also updates the Convert MBT Compensation to Standard Compensation operation type on the Mass Operation Management task to support percent-based commission plans.

Workday also updates these web services to support MBT:

- Put Compensation Basis.
- Put Compensation Plans.
- Request Compensation Change.

https://doc.workday.com/release-notes/en-us/hrcomp/8477420.html

Automatically available

Percent-Based Commission Plans for MBT and Web Services, continued

What do I need to do

Add percent-based commission plans to your MBT compensation basis or to the web services.

What happens if I do nothing

Nothing. Workday works the same as in previous updates.

https://doc.workday.com/release-notes/en-us/hrcomp/8477420.html

Automatically available

Increased Flexibility for Compa-Ratio and Position in Range Fields

What's changing

Workday improves the user experience for displaying the Compa-Ratio and Position in Range fields when assigning compensation. Workday updates the Edit Compensation Package Analytics task with these 2 new and more intuitive options:

- Display Compa-Ratio.
- Display Position in Range.

If selected, Workday displays Compa-Ratio or Position in Range fields on the Total Base Pay and Primary Compensation Basis tasklets during business processes such as Change Job and Request Compensation Change and, now for Workday 2025R1, also Hire, Add Additional Job, and Start International Assignment.

Additional considerations

Workday adds these 2 new options to the Edit Compensation Package Analytics task:

- Display Compa-Ratio.
- Display Position in Range.

Workday removes the Hide Compa-Ratio and the Hide Compensation Package Analytics options.

Workday also adds the Compa-Ratio and Position in Range fields to the Total Base Pay and Primary Compensation Basis tasklets during the Hire, Add Additional Job, and Start International Assignment processes.

https://doc.workday.com/release-notes/en-us/hrcomp/8481757.html

Increased Flexibility for Compa-Ratio and Position in Range Fields, continued

Additional considerations

Workday persists your pre-2025R1 compensation package analytics configuration. Example: If you enabled Hide Compa Ratio on the Edit Compensation Package Analytics task in 2024R2, Workday doesn't enable the Display Compa-Ratio field in Workday 2025R1 and Compa Ratio still won't display.

By default, Workday enables Position In Range because with the required display of at least one range, Workday also displayed Position in Range for the enabled ranges.

If your pre-2025R1 configuration had Hide Compensation Package Analytics enabled, Workday 2025R1 disables both Display Position in Range and Display Compa-Ratio.

https://doc.workday.com/release-notes/en-us/hrcomp/8481757.html

Increased Flexibility for Compa-Ratio and Position in Range Fields, continued

What do I need to do

Nothing. The 2 new options are automatically available on the Edit Compensation Package Analytics task.

What happens if I do nothing

Workday persists any existing package analytics display configurations, but uses the new field names. The 2 new options display on the Edit Compensation Package Analytics task and the 2 older options are removed. Compa-Ratio and Position in Range now display in tasklets on the Hire, Add Additional Job, and Start International Assignment business processes.

https://doc.workday.com/release-notes/en-us/hrcomp/8481757.html

U.S. Federal Personnel Action Requests on Compensation Web Services

What's changing

With this update, Workday delivers enhancements to the Personnel Action Requests (PAR) feature to improve efficiency and flexibility in managing PAR requests with compensation web services.

Additional considerations

Workday enables the Personnel Action Request (PAR) business process as a subprocess of these web services:

- Request Compensation Change.
- Request One-Time Payment.

What do I need to do

This feature is specific to U.S. federal customers. Update to the latest version as required.

What happens if I do nothing

This feature is specific to U.S. federal customers. If you don't update to the latest version, the Personnel Action Request (PAR) sub process won't be available on the web services.

https://doc.workday.com/release-notes/en-us/hrcomp/6531344.html

Human Capital Management – Core HCM

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Custom Labels for Workday Fields

What’s changing

With this release, Workday enables you to rename Workday fields to better meet customer requirements, particularly those of government agencies.

Additional considerations

You can use the Maintain Custom Labels task to rename these fields in your tenant:

- Military Status in the Personal Information term context.
- Job Exempt in the Staffing term context.

You can't override Job Exempt in U.S. Payroll tasks and reports for FICA and FLSA.

What happens if I do nothing

If you do nothing, you will see no change in Workday.

https://doc.workday.com/release-notes/en-us/hrpersoninf/8657738.html

Effective Dating for Service Dates SOAP Web Service

What's Changing

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

What do I need to do

Use v44.0 of the Edit Service Dates web service to to set the Effective Date for service dates in Production.

Additional Considerations

Edit Service Dates Web Services v44.0

Workday updates v44.0 of the Edit Service Dates SOAP web service to make the Effective Date field required.

See the SOAP API Change Log link under Related Information.

What happens if I do nothing

This update is automatically available. When you run v44.0 or v43.0 of the Edit Service Dates SOAP web service, you must enter an Effective Date.

When you run a version of the Edit Service Dates web service that's prior to v43.0, Workday defaults the Effective Date with:

- Today's date, if the hire isn't in the future.
- The hire date, if the hire is in the future.

https://doc.workday.com/release-notes/en-us/hrcore/8685977.html

cognizant

Hire Employee Task Redesign & Consolidated Hire Business Process with Compensation

What's Changing

Workday 2025R1 displays an automatically available Hire Employee task redesign and enables you to create a consolidated Hire business process, which now includes compensation.

Additional Considerations

Hire Employee Task Redesign

Workday displays a more intuitive and modern layout on the Hire Employee task, which is now automatically available in your tenant.

Consolidated Templates

Workday enables you to 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.
- Propose Compensation Hire.

https://doc.workday.com/release-notes/en-us/hrcore/8768925.html

Hire Employee Task Redesign & Consolidated Hire Business Process with Compensation, continued

What do I need to do

While the Hire Employee task redesign is automatically available in your tenant, Hire consolidation will always require configuration.

What happens if I do nothing

The previous 2024R2 opt-in has been removed and the Hire Employee task redesign is automatically available in Production tenants.

If you don’t configure the consolidated Hire experience, you won’t be able to use the Propose Compensation Hire business process as a step within the Hire business process.

https://doc.workday.com/release-notes/en-us/hrcore/8768925.html

Manager Insights Hub

What’s changing

With this release, Workday enhances Manager Insights Hub. Workday adds buttons for hiring and staffing tasks, and a new card for viewing in-progress hire events.

Additional considerations

Workday updates the Hiring and Staffing Overview tab to deliver a new In-Progress Hire Events card (secured to the Manager: Manager Insights Hub domain).

Workday also updates the Hiring and Staffing Overview tab to add these buttons in the Tasks and Reports section:

- Contract Contingent Worker.
- Add Job.
- End Job.

On the View My Team tab, Workday delivers a View Org Chart button.

https://doc.workday.com/release-notes/en-us/hrcore/8706073.html

Manager Insights Hub, continued

What do I need to do

If you have already configured the Manager Insights Hub, there's nothing you need to do. 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.

If you haven't configured the Manager Insights Hub, you must configure the 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.

What happens if I do nothing

If you've already configured the Manager Insights Hub, users will continue to be able to access the hub. Depending on their security permissions, they can view the new buttons and the new In-Progress Hire Events card.

https://doc.workday.com/release-notes/en-us/hrcore/8706073.html

Change Job New User Experience for Corrections

What's changing

With this release, Workday continues to enhance the change job experience by applying it to Change Job event corrections.

What do I need to do

The enhanced user experience is automatically available when you correct Change Job events 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.

Additional considerations

An updated layout is available when you correct a Change Job event, if that event used a Change Job template with the Enable Enhanced UI for this Template check box selected.

What happens if I do nothing

For Change Job events that use templates without the Enable Enhanced UI for this Template check box selected, there's no change when correcting the event.

For Change Job events that use templates with the Enable Enhanced UI for this Template check box selected, no action is required. The new user interface is automatically available when you correct the event.

https://doc.workday.com/release-notes/en-us/hrcore/8693362.html

Supervisory Organization Editable on the Change Job Business Process

What's changing

With this update, Workday enhances review tasks on the Change Job business process so that you can now edit the Supervisory Organization field when reviewing job changes.

Additional considerations

Workday enables you to edit the Supervisory Organization field on these tasks on the Change Job business process so that you can select the correct subordinate organization when transferring workers to a new manager:

- Review Change Job.
- Review: Receiving ~Manager~.

Workday limits editing permissions of the Supervisory Organization field when the review step is routed to the current manager. This update is not available on the Review: Current ~Manager~ task.

Note: This enhancement doesn't require you to change the business process definition.

https://doc.workday.com/release-notes/en-us/hrcore/8455001.html

Supervisory Organization Editable on the Change Job Business Process, continued

What do I need to do

This update is only available with the new Change Job experience and Change Job templates. To use it, you must opt into them if you haven’t already.

https://doc.workday.com/release-notes/en-us/hrcore/8455001.html

Automatically available

Enhanced Offboarding Resignation User Experience

What’s changing

With this release, Workday enhances the offboarding experience by improving employee self-service resignation usability.

Additional considerations

Resignation Business Process

Workday updates the user interface of these tasks on the Submit Resignation business process in order to deliver a guided experience as you complete the resignation process:

- Approve Resignation.
- Correct Resignation.
- Rescind Resignation.
- Review Resignation.
- Submit Resignation.
- Withdraw Resignation.

https://doc.workday.com/release-notes/en-us/hrcore/8394311.html

Automatically available

Enhanced Offboarding Resignation User Experience, continued

Additional considerations

Field Label Renames

For clarity, Workday renames these field labels on resignation tasks:

- Primary Reason to Reason for Resignation.
- Proposed Termination Date to When is your last available day of work?
- Secondary Reason to Additional Reasons for Resignation.

New Worker Information Side Panel

Workday also delivers a new Worker Information side panel on resignation tasks, which displays to users as they review or approve a resignation.

https://doc.workday.com/release-notes/en-us/hrcore/8394311.html

Enhanced Offboarding Resignation User Experience, continued

Additional considerations

Submit Resignation and Withdraw Resignation Tasks

Workday enables the Submit Resignation and Withdraw Resignation tasks to be searchable through global Search.

Workday enables Tenant Branding on this task.

- Mobile.

Workday automatically enables these new user interfaces for Mobile.

https://doc.workday.com/release-notes/en-us/hrcore/8394311.html

Enhanced Offboarding Resignation User Experience, continued

What do I need to do

Access the Guidance Workspace task to configure Quick Tips for resignation tasks.

What happens if I do nothing

The Resignation user interface updates and searchability of resignation tasks are automatically available.

https://doc.workday.com/release-notes/en-us/hrcore/8394311.html

Automatically available

Custom Business Process Validations on Worksheets

What's changing

With Workday 2025R1, custom business process validations now validate on worksheets, reducing manual effort and helping to ensure that data is correct.

This enhancement helps you to ensure data accuracy and reduces manual effort when resolving incorrect data.

What do I need to do

Select the Validate All button to trigger custom business process validations.

Additional considerations

Custom business process validations now trigger on these standalone worksheets when users select the Validate All button: Change Job, Change Organization Assignments, End Contract Contingent Worker, Termination

Note: This update doesn't include Org Studio worksheets.

What happens if I do nothing

There's no additional setup required in order to use this feature. If you've configured custom business process validations, they'll now trigger when you select the Validate All button on worksheets.

https://doc.workday.com/release-notes/en-us/hrcore/8454688.html

Security Update for Core Connector: Assign Organization Inbound

What's changing

Workday updates the Core Connector: Assign Organization Inbound integration to provide you with more security.

What do I need to do

Provide users with access to the Worker Data: Worker ID domain to enable them to view files on the Output Files tab.

Additional considerations

Output and Audit Files on the Core Connector: Assign Organization Inbound

Workday updates access to the files on the Output Files tab on the Core Connector: Assign Organization Inbound integration. Now, those files are secured to the Worker Data: Worker ID domain. You won't be able to view those files if you don't have access to the Worker Data: Worker ID domain.

What happens if I do nothing

You won't be able to view files on the Output Files tab if you don't have access to the Worker Data: Worker ID domain.

https://doc.workday.com/release-notes/en-us/hrcore/8616639.html

Change Job Templates New User Experience on Mobile

What’s changing

With this release, Workday enables you to leverage the simplified user interface in mobile for change job templates with subprocesses.

Additional considerations

Workday now displays the simplified user experience in mobile when users launch templates that include these subprocesses:

- Assign Collective Agreement.
- Change Organization Assignments.
- Propose Compensation.

Be sure you are using the most recent mobile application version. If not, some features or functionality may not be available.

https://doc.workday.com/release-notes/en-us/hrcore/8386701.html

Change Job Templates New User Experience on Mobile, continued

What do I need to do

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

Be sure you are using the most recent mobile application version. If not, some features or functionality may not be available.

What happens if I do nothing

Existing change job templates with the Enable Enhanced UI for this Template check box configured will use the simplified user experience when they’re launched on mobile.

https://doc.workday.com/release-notes/en-us/hrcore/8386701.html

U.S. Federal Enhancements - Personnel Action Request.

What's changing

With this release, Workday adds two new fields to PAR under the Agency Data Element (after Agency Data 5), and allows the flexibility to decide when a Cancellation PAR is required, and the ability to select the blocks that need to be left empty for a specific nature of action.

What do I need to do

These changes are automatically available for US Federal customers only.

Additional considerations

New Fields

Workday adds two new fields, Transfer In Agency Code and Transfer Out Agency Code, to PAR under the Agency Data Data Element (after Agency Data 5). These new codes are automatically available in PAR

What happens if I do nothing

These changes will still apply since they are automatically available.

https://doc.workday.com/release-notes/en-us/hreg/8400116.html

U.S. Federal Enhancements - Personnel Action Request., continued

Additional Considerations

The Transfer In Agency Code is applicable for hire when an employee is transferring from another agency. The value entered in this field will be defaulted in Block 14.

The Transfer Out Agency Code is applicable for terminations when an employee is transferring to another agency. The value entered in this field will be defaulted in Block 22.

Cancel PAR

You now have the ability to cancel a Cancel PAR business process that automatically gets generated. This allows the flexibility of not generating a Cancel PAR in special circumstances where you do not want a Cancel PAR processed.

PAR Set Up

Workday now provides the ability to select the blocks that need to be left empty for a specific nature of action.

https://doc.workday.com/release-notes/en-us/hreg/8400116.html

Human Capital Management – Journey Paths

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Illustration Replacements in Workday Journeys

What's changing

With 2025R1, Workday replaces existing illustrations in the Journeys product.

Additional considerations

With this release, Workday:

- Updates the look of View Journeys page to add branding colors to its components and remove card banners.
- Removes illustrations for Workday-delivered templates in the Journeys Workspace.
- Replaces the icon and remove the banner of the journey editor header.
- Replaces the Check for errors before preventing this journey image from the Preview tab on the journey editor.
- Replaces icons for completed and retired journeys on the View Journeys page.
- Replaces placeholder icons for step types on Journeys Self-Service view.

https://doc.workday.com/release-notes/en-us/journey/8664618.html

Illustration Replacements in Workday Journeys, continued

What's changing

With 2025R1, Workday replaces existing illustrations in the Journeys product.

Additional considerations

- Replaces placeholder icons for Step Groups on journeys displayed on the My Team tab.
- Replaces header for Journeys Self-Service view on the mobile app.
- Replaces journey card headers for Journeys Self-Service view on the mobile app.
- Replaces completed, in progress, and retired illustrations for Journeys Self-Service view on the mobile app.
- Replaces step type default icons for Journeys Self-Service view on the mobile app.

https://doc.workday.com/release-notes/en-us/journey/8664618.html

Illustration Replacements in Workday Journeys, continued

What do I need to do

This change is automatically available. Workday recommends that you update your training material to note the changes.

What happens if I do nothing

No action is required. Workday automatically replaces the existing illustrations in your tenants.

Note: Workday replaces delivered illustrations and not tenanted illustrations.

https://doc.workday.com/release-notes/en-us/journey/8664618.html

Human Capital Management – Knowledge Management

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Help Article Version History

What's changing

With this release, Workday enable you to view the version history for Help articles.

Additional considerations

In the Help article editor, Workday delivesr a new:

Version History option in the View menu

- Version History icon.
- Version History section.

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

In the Version History section, we display the last updated date and the author who made the update for each article version.

https://doc.workday.com/release-notes/en-us/help/8736380.html

Payroll

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Period Schedules and Holiday Calendar

What's changing

Workday delivers updates to the Period Schedule tasks to enable you to configure holiday calendars with your period schedules.

These updates reduce manual effort by automatically adjusting payment dates that occur on holidays when you add a holiday calendar to a period schedule.

Additional considerations

Holiday Calendar

Workday delivers the Holiday Calendar field (secured to the Set Up: Period Schedule domain) in the Payment Date Auto-Adjust section of these tasks:

- Create a Period Schedule.
- Create Additional Period Schedule.

https://doc.workday.com/release-notes/en-us/paywdcore/8384544.html

Period Schedules and Holiday Calendar, continued

Additional considerations

- Edit a Period Schedule.
- Edit Additional Period Schedule.
- View a Period Schedule.

This field enables you to add holiday calendars to your period schedules so that you can automatically adjust payment dates that occur on holidays. You can select only one holiday calendar at a time.

Payment Date is a Holiday

Workday delivers the Payment Date is a Holiday field (secured to the Public Reporting Items domain) on the Payroll Off-cycle Result Override business object.

Use this field to create custom validations using the Maintain Custom Validations report on the company holiday calendar to prevent payroll administrators from creating on-demand payments on company holidays.

https://doc.workday.com/release-notes/en-us/paywdcore/8384544.html

Period Schedules and Holiday Calendar, continued

Additional considerations

If you added a holiday calendar to your period schedules and process an on-demand payment for a worker for whom that holiday calendar applies, if the payment date falls on a company holiday, the Payment Date is a Holiday field indicates this and prevents you from proceeding.

Auto-Adjust on Holidays

Workday delivers these fields to the Payment Date Auto-Adjust section of Period Schedule tasks. When you manually change a payment date that occurs on a holiday, the payment date automatically adjusts according to what you configured in these fields.

- Auto-Adjust on Holidays.
- Before Holiday.
- After Holiday.

https://doc.workday.com/release-notes/en-us/paywdcore/8384544.html

Period Schedules and Holiday Calendar, continued

Additional considerations

This update impacts these tasks:

Create Period Schedule

- Create Additional Period Schedule.
- Edit Period Schedule.
- Edit Additional Period Schedule.
- View Period Schedule.
- the Edit Additional Period Schedule task.

Weekend Payment Date

Workday delivers the Weekend Payment Date field (secured to the Public Reporting Items domain) on the Payroll Off-cycle Result Override business object.

https://doc.workday.com/release-notes/en-us/paywdcore/8384544.html

Period Schedules and Holiday Calendar, continued

Additional considerations

Adjusted Payment Date

Workday adds the Adjusted Payment Date check box on the Generate Period Schedule Periods task to indicate which payment dates were automatically adjusted, either by the weekend or a holiday.

Get and Put Period Schedule Web Services

To support this feature, Workday delivers these fields to the Get and Put Period Schedule web services:

- Auto-Adjust on Holidays - required if you completed Holiday Calendar.
- After Holiday.
- Before Holiday.
- Holiday Calendar (optional).

https://doc.workday.com/release-notes/en-us/paywdcore/8384544.html

Period Schedules and Holiday Calendar, continued

Additional considerations

Warning Message

Workday indicates that when you remove a holiday calendar from a period schedule, Workday doesn't automatically update payment dates. You must manually update any payment dates that fall on holidays.

Additional Considerations

Workday delivers these updates to period schedules for payroll administrators only. Example: When Absence or Time Tracking administrators access Period Schedule tasks, the payroll payment date information doesn't display, so that administrators can more easily view their own relevant information.

https://doc.workday.com/release-notes/en-us/paywdcore/8384544.html

Maintain Payroll Accounting Options

What's changing

Workday introduces the Maintain Payroll Accounting Options task, which enables you to configure various payroll accounting settings and features.

Additional considerations

The Maintain Payroll Accounting Options task includes all accounting-related options from these tasks:

- Edit Tenant Setup – Payroll.
- Maintain Payroll Forward Accrual Options.
- Maintain Payroll Retro Accounting Options.
- Maintain Payroll Work-Study Options.

The accounting options will still display on the Edit Tenant Setup - Payroll task, but are read-only, and will eventually be removed. The remaining tasks are also read-only and will be fully deprecated at a later date.

The Maintain Payroll Accounting Options task will replace these as your go-to place for configuring payroll accounting settings and features.

https://doc.workday.com/release-notes/en-us/paywdacct/8534217.html

Maintain Payroll Accounting Options, continued

What do I need to do

Access the Maintain Payroll Accounting Options task to configure any accounting features and settings.

https://doc.workday.com/release-notes/en-us/paywdacct/8534217.html

Automatically available

Union Override Rates Calculation

What's changing

Workday updates the union override rates calculation.

Additional considerations

When a worker belongs to multiple unions for the same company and you set up union override rates for multiple unions that a worker belongs to on the Union tab of the Edit Company State and Local US Tax Reporting task, Workday now uses the lowest override tax rate.

https://doc.workday.com/release-notes/en-us/paywdusa/8615100.html

Retro Processing and Gross-to-Net Proration

What's changing

Workday enhances and consolidates retro pay processing to reduce the time you spend calculating, auditing, and reconciling payroll results.

Additional considerations

Workday updates Workday's logic so that pay components you configure to not recalculate in retro will not create false differences if they have a gross-to-net replacement.

https://doc.workday.com/release-notes/en-us/paywdretro/8534281.html

Automatically available

Payroll Calculation Errors

What’s changing

Workday consolidates error message instances on payroll calculation tasks to increase efficiency.

Additional considerations

Workday updates Workday instances so that when you run pay and retro calculations and receive an error message, that message displays only once. For example: if you have 4 instances, you'll see an error message once for all 4 instances, rather than seeing the same error message 4 times.

https://doc.workday.com/release-notes/en-us/paywdcore/8676923.html

Data Entry Checking and Payroll Input

What's changing

Workday 2025R1 delivers data entry checking capabilities and messaging to Payroll input tasks. When enabled, Workday tracks trends in payroll input, identifies any payroll input outliers that are either above or below the average amounts typically entered, and notifies you of the discrepancy.

Additional considerations

Data Entry Check Options

Workday delivers the Data Entry Check Options section to the Edit Tenant Setup - Payroll task. Use this section to configure messaging preferences for Payroll Input data entry checking.

You can select these options:

- Switch on Data Entry Check everywhere. When enabled, you will receive data entry check messages from all areas of Payroll that are enabled for the feature.
- Select areas to switch on Data Entry Check. If you turn off messaging for data entry check everywhere in Payroll, you can use this option to choose which areas to receive messages.

https://doc.workday.com/release-notes/en-us/payml/8664505.html

Data Entry Checking and Payroll Input, continued

Additional considerations

Edit Tenant Setup - Payroll Web Services

Workday updates these web services as part of this feature:

- Get Edit Tenant Setup – Payroll.
- Put Edit Tenant Setup – Payroll.

https://doc.workday.com/release-notes/en-us/payml/8664505.html

Data Entry Checking and Payroll Input, continued

What do I need to do

Nothing. This feature is automatically enabled, but you can configure messages, or turn them off, using the Edit Tenant Setup - Payroll task.

What happens if I do nothing

Data Entry Check messaging is automatically enabled. If you choose to turn off the messaging, you won't be notified when or if there are Payroll Input discrepancies.

https://doc.workday.com/release-notes/en-us/payml/8664505.html

Assign Costing Allocation Redesign

What's changing

With this release, Workday updates the layout of the Assign Costing Allocation task.

Additional considerations

Workday delivers a new display for the Proposed Costing Allocations tab that enables you to:

- Add, edit, remove, and sort ranges of costing allocations by start date or end date.
- Copy costing allocations of a specified date range.

Workday also updates the display of the Existing Costing Allocations tab where you can you view:

- Existing costing allocations for the specified costing criteria.
- An empty grid when a worker doesn't have any costing allocations.

https://doc.workday.com/release-notes/en-us/paywdacct/8433339.html

Assign Costing Allocation Redesign, continued

Additional considerations

You can now access the Proposed Costing Allocations and the Existing Costing Allocations tabs from your inbox when you configure the Assign Costing Allocation task as a subprocess.

You can also revise proposed costing allocation changes after an approver sends back new costing allocations and review your proposed costing allocation changes in the Proposed Costing Allocations and the Existing Costing Allocations tabs.

https://doc.workday.com/release-notes/en-us/paywdacct/8433339.html

Assign Costing Allocation Redesign, continued

What do I need to do

Workday delivers this feature automatically.

https://doc.workday.com/release-notes/en-us/paywdacct/8433339.html

Comma Separated Employee IDs on Run Retro Pay Calculation

What's changing

Workday enables you to run retro pay calculations for workers based on their employee IDs.

Additional considerations

Workday adds a new Comma Separated Employee IDs field to the Run Retro Pay Calculation task. When you enter a string of employee IDs separated by commas, Workday runs a retro pay calculation for the valid IDs that you enter from the pay group that correspond to workers who have supported retro events. Workday validates every employee ID that you enter. Expect longer validation times for large quantities of employee IDs.

Workday won't run the calculation for invalid IDs. If you have a combination of valid and invalid IDs, Workday runs the calculation only on the valid IDs. You can check to see which IDs Workday included in the calculation by clicking the number for Workers with Valid Employee ID on the results page. Workday prevents you from running the calculation on a string of only invalid IDs.

https://doc.workday.com/release-notes/en-us/paywdretro/8165792.html

Comma Separated Employee IDs on Run Retro Pay Calculation, continued

What do I need to do

When you run a retro pay calculation, select Comma Separated Employee IDs for Employees to Calculate. Then enter the list of employee IDs from the pay group that you want to include in the retro pay calculation.

You can find employee IDs for workers within a pay group by running the View Pay Group report and selecting the Members tab.

What happens if I do nothing

You can still run a retro pay calculation using the other options available for Employees to Calculate.

https://doc.workday.com/release-notes/en-us/paywdretro/8165792.html

Automatically available

Enhancements to Period Schedule Searching

What’s changing

Workday updates the search functionality for Period Schedules across Payroll, Time Management, and Absence tasks and reports.

Additional considerations

Search Period field by Date Ranges

Workday updates the Period field, enabling you to search by:

- Month. Enter any month name or abbreviation to display pay periods that start or end in the specified month. Workday can capture some misspellings. Example: You enter January, Workday returns January pay periods.
- MM/YYYY. Displays only periods that started or ended in that month and year.
- MM/DD/YYYY. Displays only periods that started or ended on, or crossed over, that specific day, month, and year.

https://doc.workday.com/release-notes/en-us/paywdcore/8143754.html

Enhancements to Period Schedule Searching, continued

Additional considerations

- MM/YYYY and Period Schedule name. Only periods that match both the date criteria and the period schedule name display. This method refines your search to the most specific results.
- YYYY. Displays only periods that started or ended in that year.

Search Period Schedule by Pay Group Details

Workday enables you to search in the Pay Run Groups and/or Pay Group Details search field using these parameters, either individually or combined:

- Pay Group.
- Period Schedule Name.
- Run Category.

Workday also captures misspelled entries. Example: You enter Regluar for Regular. The Regular pay group results display.

https://doc.workday.com/release-notes/en-us/paywdcore/8143754.html

Automatically available

Payroll Action Reasons SOAP Web Services

What’s changing

With this release, Workday delivers updates to web services to specify payslip visibility timing override.

Additional considerations

For v44.0 Workday updates the Put Payroll Action Reason and the Get Payroll Action Reason web services to deliver a new Payslip Visibility Time Override Reference field that you can use to configure when payslips on-demand are visible to employees.

Workday now displays an error message when a payslip visibility timing override is set for payslips that are off-cycle and not on-demand.

See the SOAP API Change Log link under Related Information.

https://doc.workday.com/release-notes/en-us/paywdpymt/8610472.html

Prior Wages Not Reported

What's changing

Workday introduces the ability to use payroll history payment web services to mark prior wages to exclude from tax reporting.

Note: This feature is only available for a professional employment organization.

Additional considerations

Workday adds the Prior Wages Not Reported column to the following web services:

- Get Payroll History Payments.
- Put Payroll History Payments.
- Import Payroll History Payment.

This column is visible to all customers, but is only useable for a professional employer organization.

https://doc.workday.com/release-notes/en-us/paywdcore/8340971.html

Payroll – Cloud Connect for Third Party Payroll

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Image Replacements in Workday

What's changing

With 25R1, Workday replaces images in the product.

Additional considerations

Workday update the Manage Payroll Interface Integration Command Center Data Queue task on the Payroll Interface Integration Command Center dashboard by replacing the images.

https://doc.workday.com/release-notes/en-us/payexternal/8712281.html

Additional Payroll Data on Benefits and Pay Hub

What's changing

Workday now enables you to display additional payroll data on the Benefits and Pay Hub.

Additional considerations

Workers with access to the My Additional Payroll Data report can now access the information from the report on the Benefits and Pay Hub by navigating to Pay > Additional Payroll Data.

What do I need to do

When you have enabled the Additional Payroll Data feature in Workday, you don't need to do anything for it to display on the Benefits and Pay Hub.

https://doc.workday.com/release-notes/en-us/payexternal/8355797.html

Core Payroll

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Automatically available

Rounding Recovery for Ongoing Multiple Work Jurisdictions (OMWJ)

What's changing

Workday enhances our overall architectural design for pay calculation to now support rounding recovery for amount totals for workers with OMWJ elections.

Additional considerations

Workday now applies rounding recovery for flat amount benefits and one-time payments, when you configure earnings or deductions to:

- Disable Do Not Apply Percentage Splits on the pay component.
- Enable Do Not Apply Percentage Splits in the Related Calculations grid for all pay component related calculations (or related calculations if you select None of the Above for US Override Related Calculation for Multiple Jurisdictions).

https://doc.workday.com/release-notes/en-us/paywdcore/8524393.html

Intelligent Prompt Recommendations for Pay Calculation

What's changing

With this release, Workday delivers intelligent prompt recommendations for Run Pay Calculation.

Additional considerations

Workday delivers a new Run Pay Calculation grid on the Payroll section of the Maintain Machine Learning Prompt Recommendations task. You can now configure Workday to display machine learning recommendations for the Pay Run Group and/or Pay Group Details prompt on the Run Pay Calculation task.

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

https://doc.workday.com/release-notes/en-us/payml/8734948.html

Pay Group and Pay Component Summary Reports

What's changing

Workday delivers new standard reports that you can use for a summarized view of your pay groups and pay components.

Additional considerations

Workday delivers 2 new standard reports (secured to the existing Reports: Pay Calculation Results for Pay Group (Results) domain) for Payroll administrators and partners:

- Payroll Pay Group Summary.
- Payroll Pay Component Summary.

You can use the Payroll Pay Group Summary report to view a high-level summary of Workers, Results, Gross Pay and Net Pay based on the Pay Group Details and Periods you select. You can then use the Drill-To Report Links from the Results to access the Payroll Calculation Processing Report.

https://doc.workday.com/release-notes/en-us/paywdcore/8689369.html

Pay Group and Pay Component Summary Reports, continued

Additional considerations

You can use the Payroll Pay Component Summary report to view a high-level summary of Workers, Results, Result Lines, and Result Line Amount for the Pay Components based on the Pay Group Details and Periods you select. You can then use the Drill-To Report Links from the Result Lines to access the Payroll Calculation Lines Processing Report.

Workday displays 1 or more reports that you access from the Drill-To Report Links in modal screens, reducing the need for navigation.

https://doc.workday.com/release-notes/en-us/paywdcore/8689369.html

Automatically available

Lock Pay Group for Auditing

What's changing

Workday now enables you to set up a pay group detail in a lock or unlock status. When locked, Workday doesn't automatically flips the In Progress on-cycle results within the pay group to Requires Re-calculation status due to worker-based events.

Additional considerations

Lock Pay Groups To Block All Pay Calculations on Payroll Results

Workday delivers a new Lock Pay Groups To Block All Pay Calculations on Payroll Results check box under Pay Group Status Lock of the Pay / Retro Calculations section on the Edit Tenant Setup - Payroll task.

Update Pay Group Lock Status

Workday also delivers a new Update Pay Group Lock Status task (secured to the Process: Run Batch Calculations (Pay Calculation) domain) that you can use to select the Lock Pay Groups action and enter specific Pay Group Details. When you run pay calculation and all results are In Progress, use this task to lock the pay group details.

https://doc.workday.com/release-notes/en-us/paywdcore/8714859.html

Lock Pay Group for Auditing, continued

Additional considerations

Lock Status

Workday now displays the status of the lock in the:

- Current Period Locked column on the Pay Group Period Details section of the View Pay Group report.
- Current Period Locked field on the Periods section of the View Pay Group Detail page.
- Pay Group Detail Locked column on the Results tab of the worker.

https://doc.workday.com/release-notes/en-us/paywdcore/8714859.html

Lock Pay Group for Auditing, continued

Additional considerations

Retroactive Payroll

When you enter any of these events after you lock a pay group; and you don't recalculate the worker before you complete payroll, then when you run retro pay calculation, Workday processes these events in the next on-cycle pay period:

- One-time pay input.
- One-time payment.
- Ongoing pay input.
- Period activity pay.

https://doc.workday.com/release-notes/en-us/paywdcore/8714859.html

Lock Pay Group for Auditing, continued

What do I need to do

If you've enabled Pay On-Demand or Continuous Calculation, ensure that you take these steps before you lock the pay group:

- Configure automatic stop for continuous payroll calculation or manually pause continuous payroll calculation status.
- Configure days from period end date to close requests for Pay On-Demand on period schedules.

Access the Update Pay Group Lock Status task to lock the pay group details. This task is automatically available.

Setup is required if you want a restrictive workflow for processing payroll. You must enable the Lock Pay Groups To Block All Pay Calculations on Payroll Results check box under Pay Group Status Lock of the Pay / Retro Calculations section on the Edit Tenant Setup - Payroll task

https://doc.workday.com/release-notes/en-us/paywdcore/8714859.html

Intelligent Prompt Recommendations for Payroll

What’s changing

Workday now makes intelligent prompt recommendations for payroll automatically available, meaning that you no longer need to opt in to access recommendations. Workday also enables prompt recommendations on the Add Payroll Input task.

Additional considerations

Workday now enables machine learning prompt recommendations for payroll by default. You no longer need to opt in to view recommendations on the supported tasks and prompts. You can opt out of prompt recommendations at any time.

Workday also enables prompt recommendations on the Pay Component and Run Category prompts of the Add Payroll Input task on the worker payroll results.

https://doc.workday.com/release-notes/en-us/payexp/8356208.html

Intelligent Prompt Recommendations for Payroll, continued

What do I need to do

You don't need to do anything to access prompt recommendations on the supported tasks and prompts.

To opt out of machine learning recommendations:

1. Access the Maintain Machine Learning Prompt Recommendations task.
2. In the Payroll section, clear the check boxes for any or all of these categories:-
   - Off Cycle Payments:
     - Payroll Input.
     - Proposed Pay Group.

What happens if I do nothing

If you do nothing, intelligent prompt recommendations display below the field or in a Recommended folder under the prompt.

https://doc.workday.com/release-notes/en-us/payexp/8356208.html

Payroll Accounting and Payslips

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Automatically available

Smart Print Payslips

What's changing

Workday continues to improve performance for smart print payslips.

Additional considerations

Workday improves performance while generating PDFs of Report Designer payslips when you select the Smart Print Payslips option on the Schedule BIRT Payslip Pre-Print task.

https://doc.workday.com/release-notes/en-us/payml/8737355.html

Payroll for Australia

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Pay Anomalies Enhancements

What's changing

Workday continues to improve the Pay Anomalies report and also now make it available for Payroll for Australia, Canada, and the UK along with its current availability to Payroll for the U.S.

Note: The Pay Innovation Services opt-in and the Pay Anomalies report may appear but isn't functional for Payroll for France customers.

Additional considerations

When you run the Pay Anomalies report, Workday now provides you the ability to:

- View a worker's profile by clicking the link under the Worker for Pay Anomaly section for a payroll result.
- Add tags and comments for selected payroll results by clicking the Tag Result mass action button. The tags and comments you add then display under the Pay Anomaly Tag and Comments section of the payroll result.

https://doc.workday.com/release-notes/en-us/payml/8524371.html

Payroll for Australia Payslip Enhancements

What's changing

With this release, Workday improves the payslip experience for Payroll for Australia.

Additional considerations

In the UI payslip for Payroll for Australia, you can now override the names of pay components within the Superannuation section.

You can use the Maintain Payroll Payslip Configuration task to override the names of individual pay components.

https://doc.workday.com/release-notes/en-us/paywdaus/8745735.html

TFN Declaration and Payroll Reporting Enhancements

What's changing

Workday delivers new report fields to enable you to report on FEI (Foreign Employment Income) and IAA (Inbound Assignees to Australia), and on missing Tax File Number (TFN) and superannuation choice declarations for Payroll for Australia.

Additional considerations

Workday delivers these new report fields secured to the Worker Data: Payroll (Company Specific) domain that you can use in custom reports:

- Worker Tax Detail Status.
- TFN Status in Government IDs.
- Superannuation Choice Status.
- Government ID Type.

Workday delivers these new report fields on the Payroll Result Line business object that you can use in custom reports:

- Country.
- Income Stream.

https://doc.workday.com/release-notes/en-us/paywdaus/8457030.html

Automatically available

Pay As You Go (PAYG): Pre Tax Superannuation Salary Sacrifice on Bonuses for Australia

What's changing

Workday improves the functionality of PAYG calculations when there are pre tax superannuation salary sacrifice deductions for bonus payments for Payroll for Australia.

Additional considerations

With this release, Workday improves the calculation of PAYG for bonus payments that have been reduced by pre tax superannuation salary sacrifice deductions.

Workday adds a new deduction: AUS Bonus Superannuation Employee Pre Tax Salary Sacrifice (SS). This deduction specifically reduces a worker's PAYG taxable wages for bonus payments only.

This deduction is mapped to the Salary Sacrifice Type S category in the View AUS STP Reporting Categories task.

https://doc.workday.com/release-notes/en-us/paywdaus/8381104.html

Employee Termination Payment Tax Calculations for Australia

What's changing

With this release, Workday automatically calculates Employee Termination Payment (ETP) tax for Payroll for Australia.

Additional considerations

Workday can now calculate tax on Type R and Type O Employee Termination Payments (ETP). Lump Sum D amounts are included in the ETP Type R calculation. You can view the tax data in the View Payroll Tax/Allowance Data report.

Workday now includes tax data relevant to the preservation age for Payroll for Australia. The withholding amount on a Type R or Type O ETP varies depending on whether a worker has reached the preservation age by the end of the tax year in which the payment is made.

https://doc.workday.com/release-notes/en-us/paywdaus/7620387.html

Employee Termination Payment Tax Calculations for Australia, continued

Additional considerations

Workday delivers a lookup table, AUS ETP Preservation Age for Birth Year, that you can use to view the preservation age tax data. If the worker doesn't have a date of birth recorded, it is assumed that they haven't reached the preservation age.

Workday also adds a column with a checkbox on the Maintain AUS Payroll Termination Configuration task to indicate which termination reasons are due to invalidity. If an Australian employee's termination is due to invalidity (i.e. they are physically unable to perform their job), there is an additional tax-free portion applied to their ETP.

https://doc.workday.com/release-notes/en-us/paywdaus/7620387.html

Employee Termination Payment Tax Calculations for Australia, continued

What do I need to do

Use the Maintain AUS Payroll Termination Configuration task to identify the termination reasons that should be treated as invalidity.

Verify that your termination payment earnings are configured to the correct pay component groups.

What happens if I do nothing

If you don't have any termination reasons that are mapped to invalidity, the tax-free portion due to invalidity won't be calculated. You will need to add pay input in the pay calculation for the tax-free portion.

If workers don't have a Retiree Status recorded, Workday calculates the Retirement Date as the worker's date of birth +65 years.

https://doc.workday.com/release-notes/en-us/paywdaus/7620387.html

Automatically available

Single Touch Payroll Enhancements

What's changing

Workday continues to improve the Single Touch Payroll (STP) process for Payroll for Australia.

Additional considerations

When you generate an STP report with a worker who has the declaration type No Declaration Provided, the TFN will default to 000000000.

When you generate an STP report with a worker who has no tax details recorded, these default values will automatically be used:

- TFN: 000000000.
- Payment Basis: Full-Time.
- Tax Treatment Code: NAXXXX.

https://doc.workday.com/release-notes/en-us/paywdaus/8653410.html

Payroll for Canada

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Automatically available

Pay Anomalies Enhancements

What’s changing

Workday continues to improve the Pay Anomalies report and also now make it available for Payroll for Australia, Canada, and the UK along with its current availability to Payroll for the U.S.

Note: The Pay Innovation Services opt-in and the Pay Anomalies report may appear but isn't functional for Payroll for France customers.

Additional considerations

When you run the Pay Anomalies report, Workday now provides you the ability to:

- View a worker’s profile by clicking the link under the Worker for Pay Anomaly section for a payroll result.
- Add tags and comments for selected payroll results by clicking the Tag Result mass action button. The tags and comments you add then display under the Pay Anomaly Tag and Comments section of the payroll result.

https://doc.workday.com/release-notes/en-us/payml/8524371.html

Payroll for France

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Automatically available

Updating AER and CRM Reporting Access

What’s Changing

Workday updates reports to improve access to AERs and CRMs.

Additional Considerations

With this release, Workday updates 2 reports to ensure user permissions are accurate:

- FRA AER List Termination Statement.
- View DSN Responses (CRM).

For the FRA AER List Termination Statement report, user permissions depend on the AER type

For the View DSN Responses (CRM) report, users require access to either the Process: DSN (Run) - FRA or Process: DSN for Pay Group (Run) - FRA domain to view these CRMs

https://doc.workday.com/release-notes/en-us/paywdfra/8179920.html

Renaming AER Files

What's Changing

Workday renames AER files for both the individual FCTU and the zip archive for CDDU-D.

Additional Considerations

With this release, Workday updates the DSN Polling (Machine to Machine) integration to apply meaningful file names to downloaded AER PDFs (FCTU).

The FCTU file names follow the pattern:

AER-[establishment SIRET]-[EE ID]-[yyyy][mm][dd]-[DSN Type]-[order number].pdf

Workday also renames the CDDU-D zip files (monthly DSNs). The zip file names follow the pattern:

AER-CDDU-D-[establishment SIRET]-[yyyy][mm][dd].zip

When you run DSN Polling (Machine to Machine), uploaded AER files are downloaded with the updated names.

https://doc.workday.com/release-notes/en-us/paywdfra/8032860.html

FRA Payroll Journal - Other Taxes

What's Changing

Workday creates a new pay component group to improve payroll journal reporting.

Additional Considerations

Workday delivers the new FRA Payroll Journal - Other Taxes pay component group to use for group deductions or pay component related calculations included in the Other Taxes group in a French payroll journal report.

These pay components appear in the Display Group column of FRA Payroll Journal by Company and FRA Payroll Journal by Establishment reports under Other Taxes:

- URS Supplementary Apprenticeship Contribution Provision - Alsace Moselle - ER [FRA].
- URS Supplementary Apprenticeship Contribution Provision - ER [FRA].
- TAX Construction Effort Contribution - ER [FRA].
- URS Apprenticeship Tax Annual Balance Provision - ER [FRA].

https://doc.workday.com/release-notes/en-us/paywdfra/8414864.html

Payroll for the United Kingdom

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Pay Anomalies Enhancements

What's changing

Workday continues to improve the Pay Anomalies report and also now make it available for Payroll for Australia, Canada, and the UK along with its current availability to Payroll for the U.S.

Note: The Pay Innovation Services opt-in and the Pay Anomalies report may appear but isn't functional for Payroll for France customers.

Additional considerations

When you run the Pay Anomalies report, Workday now provides you the ability to:

- View a worker's profile by clicking the link under the Worker for Pay Anomaly section for a payroll result.
- Add tags and comments for selected payroll results by clicking the Tag Result mass action button. The tags and comments you add then display under the Pay Anomaly Tag and Comments section of the payroll result.

https://doc.workday.com/release-notes/en-us/payml/8524371.html

Payroll for the United States

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Automatically available

Payroll Journal Outbound Connector

What's changing

Workday continues to enhance the Payroll Journal Outbound Connector integration.

Additional considerations

To help you maintain authorized access to documents, Workday now secures the Payroll Journal Outbound Connector integration template to these domains in addition to its existing domains:

- Domain Process: Payroll Settlement.
- Process: Run Batch Payroll Accounting.

https://doc.workday.com/release-notes/en-us/paywdi/8389948.html

Rounding Recovery for Ongoing Multiple Work Jurisdictions (OMWJ)

What's changing

Workday enhances our overall architectural design for pay calculation to now support rounding recovery for amount totals for workers with OMWJ elections.

Additional considerations

Workday now applies rounding recovery for flat amount benefits and one-time payments, when you configure earnings or deductions to:

- Disable Do Not Apply Percentage Splits on the pay component.
- Enable Do Not Apply Percentage Splits in the Related Calculations grid for all pay component related calculations (or related calculations if you select None of the Above for US Override Related Calculation for Multiple Jurisdictions).

https://doc.workday.com/release-notes/en-us/paywdcore/8524393.html

Automatically available

Rounding Recovery for Ongoing Multiple Work Jurisdictions (OMWJ), continued

What do I need to do

As a result of architectural design changes to pay calculation, Workday recommends you to carefully review your payroll results regardless of whether you use OMWJ elections or not.

https://doc.workday.com/release-notes/en-us/paywdcore/8524393.html

Automatically available

Connecticut State Tax Elections

What's changing

Workday updates payroll tax data for the state of Connecticut.

Additional considerations

Workday updates the Add Workers US Tax Election for Expiring Exempt report to now display workers who have a Connecticut withholding tax election with Withholding Code "E".

When you select Create Default Tax Election, Workday creates a new effective Connecticut tax election with a blank Withholding Code and no other fields populated.

https://doc.workday.com/release-notes/en-us/paywdusa/8030606.html

Pay Anomalies Enhancements

What's changing

Workday continues to improve the Pay Anomalies report and also now make it available for Payroll for Australia, Canada, and the UK along with its current availability to Payroll for the U.S.

Note: The Pay Innovation Services opt-in and the Pay Anomalies report may appear but isn't functional for Payroll for France customers.

Additional considerations

When you run the Pay Anomalies report, Workday now provides you the ability to:

- View a worker's profile by clicking the link under the Worker for Pay Anomaly section for a payroll result.
- Add tags and comments for selected payroll results by clicking the Tag Result mass action button. The tags and comments you add then display under the Pay Anomaly Tag and Comments section of the payroll result.

https://doc.workday.com/release-notes/en-us/payml/8524371.html

SUI Tax Deduction

What's changing

With this release, Workday updates the SUI (ER) [USA] deduction.

Additional considerations

Workday updates the SUI (ER) [USA] deduction to now use the out-of-state wage rules setting on the tax authority to determine whether or not to apply out-of-state wages to the wage base limit calculation for SUI.

What do I need to do

Nothing. The out-of-state wage rules setting on the payroll tax authority for the impacted states Indiana, Louisiana, Montana, Minnesota, Massachusetts remain the same.

What happens if I do nothing

There is no impact to existing configurations. You will now see the Allow Out-of-State Wages for State Unemployment setting on the View Payroll Tax Authority report for these 5 states:

- Indiana.
- Louisiana.
- Montana.
- Minnesota.
- Massachusetts.

https://doc.workday.com/release-notes/en-us/paywdusa/8666602.html

Automatically available

State Other Taxes

What's changing

Workday updates payroll tax data and related tax calculations for state other tax authorities.

Additional considerations

We update the tax calculations for payroll other taxes and tax deductions to now resolve based on the Sub Period End Date of the pay period instead of the payroll payment date

https://doc.workday.com/release-notes/en-us/paywdusa/8540017.html

Automatically available

Do Not Apply Percentage Splits for Ongoing Multiple Work Jurisdictions (OMWJ)

What's changing

Workday improves the pay component configuration for workers with multiple work jurisdictions.

Additional considerations

When you enable "Do Not Apply Percentage Splits" for a pay component and its related calculations on the Effective Dated tab of the Create Earning or Create Deduction tasks; Workday now automatically resolves the pay component in a single result line and applies the earning or deduction to the worker's default work tax authority without the need for a state worktag.

Enabling Do Not Apply Percentage Splits may impact retro result lines by creating negative and positive retro result lines for the pay component resulting in a net zero difference.

https://doc.workday.com/release-notes/en-us/paywdinput/8557148.html

Platform and Product Extensions

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Automatically available

Security History for Users Audit Report

What's changing

With this release, Workday continues to enhance the change job experience by applying it to Change Job event corrections.

Additional considerations

Workday delivers a new Security History for Users Audit Report (secured to the Security Administration domain) that you can use to view changes in security group membership for users or organizations.

Before you generate the report, you can use optional prompts to narrow the search parameters, including:

- A From date field.
- A To date field.
- A Users prompt.
- An Organizations prompt.

Once you generate the report, you can view information about individual security events, including the:

- Security History Event name.
- Security Groups Affected.
- Security Revoked.
- Security Group Type.

https://doc.workday.com/release-notes/en-us/configsec/8372661.html

Media Security

What's changing

Workday Media Cloud updates video tokenization to improve security.

Additional considerations

When you become inactive while watching videos in Workday, Workday now automatically refreshes the page after 5 minutes of inactivity (decreased from 4 hours).

https://doc.workday.com/release-notes/en-us/wmc/8563638.html

What's New in Workday Synchronization

What’s changing

What's New in Workday Synchronization

What do I need to do

You don’t need to take any action. This update is automatically available and will display for users even if you do nothing.

Additional considerations

Workday now synchronizes the delivery of release notes with the Release Center and What’s New in Workday report.

What happens if I do nothing

Workday will synchronize updates to the What’s New in Workday report with the delivery of release notes to the Release Center.

https://doc.workday.com/release-notes/en-us/adopt/7824631.html

Automatically available

AWS GovCloud Support for Integration Files

What's changing

Workday now supports AWS GovCloud regions for integration data file delivery and retrieval. This enhancement enables you to directly retrieve and deliver integration data files to S3 buckets in an AWS GovCloud region without having to transfer those files to intermediary servers first.

Additional considerations

For Inbound EIBs, Workday adds these options to the Region prompt on the Get Data page of the Create EIB task when you select Amazon Simple Storage Service from the Retrieval Method prompt:

- AWS GovCloud (US-East).
- AWS GovCloud (US-West).

For Outbound EIBs, Workday adds the same options to the Region prompt on the Deliver page of the Create EIB task when you select Amazon Simple Storage Service from the Delivery Method prompt.

Using an Integration Retrieval service, you can now configure a integration business process definition with a Document Retrieval Service step to retrieve an integration data file from your Amazon S3 bucket in any AWS GovCloud Regions.

https://doc.workday.com/release-notes/en-us/eib/7957552.html

AWS GovCloud Support for Integration Files, continued

Additional considerations

Similarly, using an Integration Delivery service, you can now configure a integration business process definition with a Document Delivery Service step to deliver an integration data file to your Amazon S3 bucket in any of the AWS GovCloud Regions.

Note: Currently, Amazon doesn't support S3 Transfer Acceleration in AWS GovCloud regions.

https://doc.workday.com/release-notes/en-us/eib/7957552.html

Benefits and Pay Hub Enhancements

What's changing

In preparation for the future retirement of the Pay worklet, Workday updates the Benefits and Pay Hub to allow you to view relevant pay and benefits information.

These updates improve workers' overall experience with accessing their benefits and pay information, support and centralize actions like viewing or editing tax elections and withholdings, and give you greater flexibility and customization options for delivering benefit and pay information to your workers.

Additional considerations

Disable Pay Worklet

Workday delivers the Disable Pay Worklet checkbox on the Edit Tenant Setup - Payroll task in the Payroll Administrator Results section. This checkbox enables you to configure whether workers can access the Pay worklet.

Accounts

Workday delivers the Accounts section to the Benefits and Pay Hub, in the Pay > Payments > Payment Elections section.

Workers can use this section to view, add, or update their accounts for receiving pay.

https://doc.workday.com/release-notes/en-us/paywdcore/8324268.html

Benefits and Pay Hub Enhancements, continued

Additional Consideration

Federal, State, Local, and Provincial Withholdings

Workday delivers these buttons to the Benefits and Pay Hub for workers in Canada and the U.S. in the Pay > Tax section:

- Federal Withholdings.
- State Withholdings (U.S. only).
- Local Withholdings (U.S. only).
- Provincial Withholdings (Canada only).

Workers can use these buttons to add new or edit withholdings elections to ensure accurate tax reporting.

https://doc.workday.com/release-notes/en-us/paywdcore/8324268.html

Automatically available

Benefits and Pay Hub Enhancements, continued

Additional Consideration

Withholding Elections

Workday delivers the Withholding Elections button to the Benefits and Pay Hub in the Overview > Tasks and Reports section. Workers in Canada and the U.S. can click this button to quickly access their tax withholdings information.

View Arrears Details

Workday delivers the View Arrears Details card to the Benefits and Pay Hub on the Overview page.

Workers in Canada and the U.S. can use this card to view arrears balances, if applicable. Arrears on the primary position display by default. If the worker has no arrears associated with their primary position, any arrears associated with other positions display.

https://doc.workday.com/release-notes/en-us/paywdcore/8324268.html

Benefits and Pay Hub Enhancements, Continued

Additional Consideration

Switch Positions

Workday delivers the Switch Positions button to the Benefits and Pay Hub in the Pay > Tax Elections section for workers in Canada and the U.S. with multiple jobs. Workers with multiple jobs can select this button to navigate between positions and view their pay, elections, and benefits information.

https://doc.workday.com/release-notes/en-us/paywdcore/8324268.html

Automatically available

User Administration User Experience

What’s changing

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

Additional considerations

This feature was previously available as opt-in but now it's enabled by default.

From the new UI pages, Workday now provides:

- In-context actions menu to edit, email, and delete users.
- Real-time validation messages while editing user fields.
- Auto-population for some fields such as Salesforce username and NetSuite email.
- Improved pagination which maintains the original page state.

If you want to disable the new UI pages, you can clear these options from the Visual Preferences page under Administration:

- Administration Landing.
- Administration Users.

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

Automatically available

User Administration User Experience, continued

What do I need to do

Nothing.

What happens if I do nothing

You'll see the new administration UI ages by default.

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

Automatically available

Flex Team Details on Mobile

What's changing

Workday updates the look and feel of flex team details on the mobile application to match the look and feel of flex team details on mobile browsers.

What do I need to do

Nothing, this enhancement is automatically available.

Additional considerations

When you view flex team details on the mobile application, Workday now displays graphics, fonts, and other items that match flex team details on mobile browsers.

What happens if I do nothing

Flex team details have the same look and feel on the mobile application and on mobile browsers.

https://doc.workday.com/release-notes/en-us/gigs/8533576.html

Automatic Advance of Business Processes when Integrations Fail

What's changing

With this release, Workday now enables you to automate whether your business processes can advance, even if associated integrations fail.

What do I need to do

Nothing. This feature is automatically available.

Additional considerations

Workday delivers a new Advance Automatically check box to the Maintain Redirect related action for integration steps on business processes. When you select the Advance Automatically checkbox, Workday disables manual redirect actions and automatically advances your business processes to the next step if an integration fails.

What happens if I do nothing

This feature is automatically available. You won't experience any change except for the ability to select the Advance Automatically checkbox in the Maintain Redirect related actions for integration steps on business processes.

https://doc.workday.com/release-notes/en-us/efcore/8244322.html

Automatically available

Routing Modifier Support on the Request Business Process

What's changing

With this release, Workday adds support for the Primary Position and Additional Positions routing modifiers on the Request business process.

Additional considerations

Workday delivers a new Routing Modifier prompt that enables users to select routing modifiers for steps when configuring a Request business process definition.

https://doc.workday.com/release-notes/en-us/efcore/8244335.html

Latest Event Record Moment for Reassigned Business Process Tasks

What’s changing

With this release, Workday provides a more accurate date and time when a business process task is successfully reassigned to another person to act on.

Additional considerations

When you reassign a business process step, Workday now displays the latest date and time when the reassignment successfully completes. Workday displays the latest timestamp for the reassigned event record associated with the My Tasks item:

- In the Event Record Moment column on the All Actions tab of the Full Process Record.

https://doc.workday.com/release-notes/en-us/efcore/7944614.html

Latest Event Record Moment for Reassigned Business Process Tasks, continued

Additional Considerations

When you use the Last Updated Moment report field to report on the last moment a step was updated. Workday now returns the same date and time as the Event Record Moment on the Full Process Record.

When you reassign an unassigned task and the business process administrator approves the reassignment, Workday updates the Event Record Moment to reflect when the awaiting person is assigned to take action on the task.

Workday doesn't update the Event Record Moment if the reassignment is:

- Canceled.
- Denied.
- Pending.

https://doc.workday.com/release-notes/en-us/efcore/7944614.html

Printable Attachments for Docs for Layouts

What’s changing

Workday now enables you to append image and PDF attachments to printed documents that use a document layout from Docs for Layouts.

Additional considerations

When a document is printed using a Docs for Layouts document layout Workday appends:

- 1 page per image attachment in the same size as the first page in the document. GIF, JPEG, PDF, and PNG file types are supported.
- PDF attachments in their original size.
- A page at the end of the document that lists the attachments that weren’t appended along with the reason.

Bulk printing of customer invoices with attachments currently only supports a batch size of 1,000 documents.

https://doc.workday.com/release-notes/en-us/print/8162913.html

Platform and Product Extensions – Business Process

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Edit To Do Task

What's changing

Workday now enables you to use a standalone task or related action to edit To Dos.

Additional considerations

Workday delivers a new Edit To Do task secured to these domains:

- Business Process Administration.
- Manage: Business Process Definitions.

You can use the Edit To Do task to edit these To Do details either directly or as a related action for a To Do item.

- Inactive/Active.
- Instructional Text.
- Show Report Document.
- Task.
- To Do Description.

https://doc.workday.com/release-notes/en-us/efcore/8768668.html

Edit To Do Task, continued

What do I need to do

Nothing. This feature is automatically available.

What happens if I do nothing

This feature is automatically available. You won't experience any change except for the ability to search for the standalone Edit To Do task or view the related action to edit To Dos.

https://doc.workday.com/release-notes/en-us/efcore/8768668.html

Platform and Product Extensions – Document Tools

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Automatically available

New Compensation Review Report Data Source Support in Docs for Layouts

What's changing

Docs for Layouts now supports a new Report Data Source (RDS) for Compensation Review documents.

Additional considerations

You can now use Docs for Layouts for advanced custom reports that use the following supported data source:

• Compensation Review Process Employee Adjustments – Indexed

https://doc.workday.com/release-notes/en-us/contentplat/8787237.html

Automatically available

Set Table Row Height in Docs for Layouts

What's changing

You can now set a fixed height for table rows in document layouts.

Additional considerations

Workday adds new Auto and Fixed options on the Format tab in the right panel of a document layout. When a new row is added to a table, the height of the row defaults to Auto (25 pixels). You can use Fixed to select the height (in pixels) for a row.

https://doc.workday.com/release-notes/en-us/contentplat/8763382.html

New Learning Report Data Source Support in Docs for Layouts

What's changing

Docs for Layouts now supports 2 new Report Data Sources (RDS) for Learning documents.

Additional considerations

You can now use Docs for Layouts for advanced custom reports that use the following supported data sources:

- Learning Enrollments.
- Learning Record.

https://doc.workday.com/release-notes/en-us/contentplat/8780927.html

Automatically available

Custom Conditions in Docs for Layouts

What's changing

You can now create custom condition rules to control the visibility of content in a document layout.

Additional considerations

Workday adds a new Create a Condition button on the Conditions tab in the right panel of a document layout. You can use this button to open the Create Custom Condition modal and create condition rules for numeric and string data fields available from the source report. Workday also adds the ability to filter the list of condition rules on the Conditions tab by type.

What do I need to do

The ability to create custom condition rules is available automatically. Once you create a custom condition, you can apply it to content in the document layout.

What happens if I do nothing

If you choose not to create a custom condition, you can continue to use boolean data type conditions, which are automatically available from the report source associated with the document layout and display on the Conditions tab.

https://doc.workday.com/release-notes/en-us/contentplat/8092717.html

New Customer Statement Report Data Source Support in Docs for Layouts

What's changing

Docs for Layouts now supports a new Report Data Source (RDS) for Customer Statement documents.

Additional considerations

You can now use Docs for Layouts for advanced custom reports that use the following supported data source:

- Customers for Customer Statement Printing Run.

https://doc.workday.com/release-notes/en-us/contentplat/8793134.html

Platform and Product Extensions - Integration

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Automatically available

Supplier E-invoice Generic Connector Updates

What's changing

Workday supports new fields in the Core Connector: Electronic Supplier Invoice integration template.

What do I need to do

You must pass in these new mappings using the existing Supplier E-invoice Generic Connector.

Additional considerations

Workday delivers new mappings for these supplier invoice fields in the Core Connector: Electronic Supplier Invoice integration template:

- Bill From and Ship From.
- Commodity Code.

What happens if I do nothing

To use the new mappings, you must pass them in using the existing Supplier E-invoice Generic Connector.

https://doc.workday.com/release-notes/en-us/finint/8758350.html

Errors in Financial Payment Integrations

What's Changing

Workday now displays error messages when outbound payment integrations are missing critical data to process.

Additional Considerations

Workday updates the logic in these outbound payment templates to send an error message when no customer invoices or journal lines are available:

- Core Connector: Electronic Customer Invoices.
- Financial Journal Lines Outbound Connector.

https://doc.workday.com/release-notes/en-us/finint/8720213.html

Business Entity Contacts Query in Workday Graph API Schema

What's Changing

Workday continues to grow the Workday Graph API schema, providing Workday Extend apps access to more business object data using Graph API.

Additional Considerations

Workday delivers the new **businessEntityContact** query, enabling Extend apps to read Business Entity Contact data using Workday Graph API. To configure the security domains for the new query, access the View Security for Securable Item report in Workday.

https://doc.workday.com/release-notes/en-us/fincore/8405275.html

Accounting Journal Scalability and Performance

What's Changing

Workday continues to deliver accounting journal scalability and performance updates.

Additional Considerations

Workday updates the processing of the Unpost-Reverse Accounting Journal web service, enabling you to potentially experience faster run times when you use this web service to unpost or reverse journals with more than 500 journal lines.

What do I need to do

Nothing! This release note informs you about potential performance improvements and you don't need to take any action.

What happens if I do nothing

There is no impact.

https://doc.workday.com/release-notes/en-us/fincore/8058825.html

Platform and Product Extensions – User Experience

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Automatically available

Guidance Workspace

What’s changing

With this release, Workday delivers a new Insights tab on the Guidance Workspace, which you can use to access all insights reports.

Additional considerations

Workday moves insights reports from suggested links into the Insights tab on the Guidance Workspace.

What do I need to do

You don't need to do anything.

https://doc.workday.com/release-notes/en-us/uicont/8812552.html

Automatically available

Saved in Global Navigation Menu

What's changing

Workday delivers a new feature in the Global Navigation Menu for users to access their saved content across Workday in a single location.

Additional considerations

Workday delivers a new Saved menu option that centralizes all saved items and favorites in Workday into a single globally accessible location. You can now save these items in the Saved menu option on the Global Navigation menu:

- Career Hub - Saved Plan.
- Drive Favorites.
- Favorites.
- Learning - Saved for later and Paths.
- Shortcuts.

Workday categorizes saved items automatically by product area.

https://doc.workday.com/release-notes/en-us/uiplatform/8761410.html

Saved in Global Navigation Menu, continued

What do I need to do

You don't need to do anything.

What happens if I do nothing

You can still access the Saved menu option.

https://doc.workday.com/release-notes/en-us/uiplatform/8761410.html

Automatically available

Global Navigation Menu Categories Opt-out and Configuration

What's changing

Workday enables you to view and configure the Global Navigation Menu in the System Admin Hub.

Additional considerations

Workday changes the Global Navigation Menu categories from an opt-in to an opt-out feature.

Note: In preview tenants, Workday displays Global Navigation Menu categories by default and you will not be able to opt-out of this change for a brief period during the preview window. However, you can opt-out of categorized navigation once Workday releases this feature in the production tenant in 2025R1.

Workday moved the Configure Global Navigation Menu task to the System Admin Hub. Workday also delivers the new View Global Navigation Menu task (secured to the Set Up: Tenant Setup - Worklets domain), which you can access from the System Admin Hub. Workday enables users to access the Configure Global Navigation Menu task using the Edit Navigation button to make changes to their navigation configuration.

https://doc.workday.com/release-notes/en-us/uiplatform/8769799.html

Global Navigation Menu Categories Opt-out and Configuration, continued

Additional considerations

Workday also renames these items on the Configure Global Navigation Menu task:

- Worklet to Menu Item.
- Worklet Title to Rename Menu Item.
- Required for to Security Groups.

https://doc.workday.com/release-notes/en-us/uiplatform/8769799.html

Global Navigation Menu Categories Opt-out and Configuration, continued

What do I need to do

You don't need to do anything.

https://doc.workday.com/release-notes/en-us/uiplatform/8769799.html

Add Course Section to Saved Schedule Task

What's changing

With this release, Workday renames the Course Unavailable For field on the Add Course Section to Saved Schedule task.

Additional considerations

For clarity, Workday renames the Course Unavailable For field on the Add Course Section to Saved Schedule task to Unavailable For These Saved Schedules. This enables students to align their selected courses and course sections with their course plans for upcoming academic periods more efficiently.

https://doc.workday.com/release-notes/en-us/stureg/8733377.html

Platform and Product Extensions – Workday Extend

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Automatically available

Get Skill Categories SOAP Web Service

What's changing

With this release, Workday delivers a new public web service that returns skill category groups, skill categories, and skills.

Additional considerations

You can use the new v44.0 Get Skill Categories SOAP web service (secured to the Set Up: Skills and Experience domain) to report on:

- Skill category groups.
- Skill categories.
- Skills in those skill categories.

See the SOAP API Change Log link under Related Links.

https://doc.workday.com/release-notes/en-us/skills/8806104.html

Graph API Validate-Only Header

What's changing

Workday updates Workday Graph API, enabling you to submit mutations in validate-only mode.

What do I need to do

When you want to submit a mutation in validate-only mode, specify this HTTP header with your Graph API request:

x-validate-only: 1

Additional considerations

When you set the HTTP header x-validate-only to 1, Graph API only validates the request and doesn't update the tenant data. The Graph API response adds an extensions object with the validateOnly property containing the isSuccess field, which indicates the validation result.

What happens if I do nothing

By default, Graph API mutations save the tenant data as specified in the request.

https://doc.workday.com/release-notes/en-us/tri/7728754.html

Spend Management

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Automatically available

View Journal Lines

What's changing

Workday provides a new journal line drill down and related action on operational and accounting journal entries.

Additional considerations

Workday delivers a new Journal Line column on the View Journal report for these journals:

- Accounting Center Summary Journals.
- Accounting Journals.
- Operational Journals.
- Summary Journals.

Workday also:

- Displays a new Journal Line preview window that you can access from the related actions menu of the journal line.
- Enables you to drill down on journal lines when you view custom reports that use the Journal Line report field.

https://doc.workday.com/release-notes/en-us/fincore/8724353.html

View Journal Lines, continued

Additional considerations

- Delivers a new View Journal Line report (secured to the Core Navigation domain) that displays both header and line information.

Note: To access the new View Journal Line report or perform related actions on the journal line, you must have security permissions to the journal company as well as access to the ledger account on the journal line when Ledger Account Segmented Security is configured. In addition to these contextual security requirements, Workday also requires access to at least 1 of these domains:

- *Process: Journals – View.*
- *Process: Journals – Reporting.*
- *Reports: Organization Journals Reporting.*

https://doc.workday.com/release-notes/en-us/fincore/8724353.html

Automatically available

Ability to Restrict Access to Ad Hoc Inventory Put Aways

What’s changing

With Workday 2025 R1, Workday delivers the ability to restrict access to ad hoc inventory put away transactions to ensure that task users have the necessary awareness of item costs and worktags included on these transactions. Workday helps your users distinguish ad hoc put-away transactions from order-based put-away transactions.

Additional considerations

Workday delivers a new Ad Hoc Inventory Put Away task (secured to the Inventory Put-Away Event business process) to separate the ad hoc put away task from the standard Put Away Inventory task. This enables you to secure different users to the different put-away tasks.

Workday now removes the Ad Hoc Put-Away option from the Put Away Inventory task. You can only process order based transactions using the Put Away Inventory task.

https://doc.workday.com/release-notes/en-us/sminv/8402593.html

Ability to Restrict Access to Ad Hoc Inventory Put Aways, continued

Additional considerations

Reporting

Workday delivers a new Put Away Transaction Origin field on the View Inventory Transaction page for put away transactions.

Workday delivers a new Put Away Transaction Origin report field on the Inventory Transaction business object (secured to the Public Reporting Items domain) that you can use in custom reports and condition rules for all put away transactions.

https://doc.workday.com/release-notes/en-us/sminv/8402593.html

Ability to Restrict Access to Ad Hoc Inventory Put Aways, continued

What do I need to do

Review the business process for Inventory Put-Away Event and confirm security access to the new ad hoc task. Workday performs a conversion to copy the Put Away Inventory initiating action to the new Ad Hoc Inventory Put Away task.

What happens if I do nothing

There is no impact.

https://doc.workday.com/release-notes/en-us/sminv/8402593.html

Automatically available

Enhanced Security for Organization Reporting - Receipt/Receipt Adjustment

What's changing

With this release, Workday enables greater access to these report data sources for the Intersection security group:

- Receipt Line by Organization (Indexed).
- Return Line by Organization (Indexed).

Additional considerations

Receipt Line by Organization (Indexed)

Workday updates the Receipt Line by Organization data source filter to evaluate security for the Intersection security group.

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

Workday also replaces the Location report field on the Taggable business object (secured to the Public Reporting Items domain) with the new Location for Receipt Line Distribution report field on the Report Receipt Line Distribution business object (secured to the Public Reporting Items domain). You can use this new report field when creating custom reports on receipt lines.

https://doc.workday.com/release-notes/en-us/smorder/8769257.html

Enhanced Security for Organization Reporting - Receipt/Receipt Adjustment, continued

Additional considerations

Return Line by Organization (Indexed)

Workday updates the Return Line by Organization data source filter to evaluate security for the Intersection security group.

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

Organization

Workday also updates the Organization prompt on custom reports to display only relevant values to the respective security groups.

https://doc.workday.com/release-notes/en-us/smorder/8769257.html

Automatically available

Personalized Search for Requisitions Worklet

What's changing

Workday enhances the catalogue search in the Requisitions worklet to display personalized search results based on purchase history for similar requisitions, enabling you to find items for your requisitions more easily.

Additional considerations

Workday enhances the catalogue search in the Requisitions worklet to display personalized search results based on purchase history and display these items higher in the list of search results.

When you perform a search using the Search Catalogue ordering method in the worklet, Workday now matches search results with data from successfully completed requisition lines in the past year that have a matching company, ship-to and deliver-to addresses, and at least 1 matching worktag.

https://doc.workday.com/release-notes/en-us/smorder/6554560.html

Personalized Search for Requisitions Worklet, continued

What do I need to do

Nothing. Search results in the Requisitions worklet will be automatically personalized based on purchase history.

What happens if I do nothing

If you do nothing, your search results in the Requisitions worklet will be automatically personalized based on purchase history.

https://doc.workday.com/release-notes/en-us/smorder/6554560.html

Automatically available

Enhanced Security for Organization Reporting - Internal Service Delivery

What’s changing

With this release, Workday enables greater access to the Internal Service Delivery Lines and Line Splits report data source for the Intersection security group.

Additional considerations

Workday updates the Internal Service Delivery Line Distributions by Organization data source filter to evaluate security for the Intersection security group.

For Intersection security group users, Workday now only displays internal service delivery line distributions that meet all dimensions of the security group on custom reports.

Workday also updates the Organization prompt on custom reports to display only relevant values to the respective security groups.

https://doc.workday.com/release-notes/en-us/smorder/8771255.html

Automatically available

Purchase Item Security Domain for Catalog Search in the Requisitions Worklet

What’s changing

Workday enhances the security for the catalog search in the Requisitions worklet.

What do I need to do

Nothing, this update is automatically available.

Additional considerations

Workday enhances the security for the catalog search when you use the Search Catalog ordering method in the Requisitions worklet, enabling you to view catalog items when you have access to the View: Purchase Item security domain (secured to the Procurement functional area).

What happens if I do nothing

Users with access to the View: Purchase Item security domain will continue to be able to view catalog items in the Requisitions worklet when using the Search Catalog ordering method. If you don’t have access to the View: Purchase Item security domain, you won’t be able to view items in the catalog search.

https://doc.workday.com/release-notes/en-us/smreq/7636360.html

Non-Catalog Request Improvements in Requisitions Worklet

What’s changing

With this release, Workday delivers a redesigned user experience with consolidated sections for goods and services non-catalog requests in the Requisitions worklet.

Workday also enables you to configure your non-catalog requests to default to goods or services, and Workday can now suggest users to create catalog requests instead of non-catalog requests when appropriate.

Additional considerations

Workday delivers a new Default Non-Catalog Request Line Type in Requisitions Worklet prompt on the Edit Company Procurement Options task, enabling you to select either goods or services as the default non-catalog request type for your buyers. Setting a default request type eliminates the need for your users to select a request type when they create a non-catalog request, making the request process more efficient. You can also select the option for no defaulting. By default, Workday doesn’t select an option on the new Default Non-Catalog Request Line Type in Requisitions Worklet prompt and your non-catalog requests in the worklet remain defaulting to goods.

https://doc.workday.com/release-notes/en-us/smreq/7635765.html

Non-Catalog Request Improvements in Requisitions Worklet, continued

Additional considerations

Workday also delivers a new user interface with more compact sections for goods and services non-catalog requests in the worklet, making the request process more user-friendly and efficient.

For goods non-catalog requests, Workday consolidates the:

- What do you need to order?, What type of order is it?, and Other details to add sections into a new Request Details section.
- What is the quantity and cost? section and Memo prompt from the Other details to add section into a new Pricing section.
- Other details to add section into a new Additional Details section.

https://doc.workday.com/release-notes/en-us/smreq/7635765.html

Non-Catalog Request Improvements in Requisitions Worklet, continued

Additional considerations

For both of the new goods and services non-catalog request user interfaces, Workday adds a new Commodity Code prompt to the respective Request Details sections, enabling you to select a commodity code for your non-catalog requests.

Workday can now detect when a goods line item in your non-catalog request may be available for request from the catalog and suggest you make a catalog request instead.

These suggestions are based on supplier item identifiers that are linked to existing purchase items. This reduces the amount of non-catalog requisitions created for items that are in the catalog, improving requester compliance.

https://doc.workday.com/release-notes/en-us/smreq/7635765.html

Non-Catalog Request Improvements in Requisitions Worklet, continued

Additional considerations

Workday also delivers the new Line Nudged report field on the Requisition Line business object (secured to the Public Reporting Items domain) that you can use in custom reports to provide information about requisition lines created from suggestions to make a catalog request.

https://doc.workday.com/release-notes/en-us/smreq/7635765.html

Non-Catalog Request Improvements in Requisitions Worklet, continued

What do I need to do

You don’t need to do anything for these enhancements that are automatically available in the Requisitions worklet:

Redesigned goods and services non-catalog request pages.

Suggestions by Workday for users to create catalog requests instead of non-catalog requests, when appropriate.

By default, Workday doesn’t select any option on the new Default Non-Catalog Request Line Type in Requisitions.

What happens if I do nothing

By default, Workday doesn’t select any option on the new Default Non-Catalog Request Line Type in Requisitions Worklet prompt and your non-catalog requests in the worklet remain defaulting to goods.

These enhancements will be automatically available in the Requisitions worklet:

- Redesigned goods and services non-catalog request pages.
- Suggestions by Workday for users to create catalog requests instead of non-catalog requests, when appropriate.

https://doc.workday.com/release-notes/en-us/smreq/7635765.html

Non-Catalog Request Improvements in Requisitions Worklet, continued

What do I need to do

Worklet prompt and your non-catalog requests in the worklet remain defaulting to goods. To change the default for your non-catalog requests in the worklet:

- Access the Edit Company Procurement Options task to configure the default by company.
- In the General Requisition Options section, select an option from the Default Non-Catalog Request Line Type in Requisitions Worklet prompt. You can set your non-catalog requests in the worklet to not default to either goods or services, default to goods, or default to services.

https://doc.workday.com/release-notes/en-us/smreq/7635765.html

Display All Names for Requisitions Awaiting Action by Multiple Users in the Requisitions Worklet

What's changing

Workday enables you to view the names of all users for requisitions awaiting action by more than one user.

Additional considerations

Workday adds an Awaiting Action - Show Details link on open requisitions awaiting action by multiple users in the Requisitions worklet. You can select Awaiting Action - Show Details to view the names of all users that can take action on requisitions that are awaiting action by multiple users.

Workday also delivers a new Requisition Event Viewable by Processing Person report field (secured to the Public Reporting Items domain) on the Requisition business object that you can use on custom reports.

https://doc.workday.com/release-notes/en-us/smreq/8396503.html

Display All Names for Requisitions Awaiting Action by Multiple Users in the Requisitions Worklet, continued

What do I need to do

This feature is automatically available and no configuration is needed.

https://doc.workday.com/release-notes/en-us/smreq/8396503.html

Add Reasons and Comments for Canceling or Closing Requisitions in the Requisitions Worklet

What's changing

Workday enables you to now add reasons for canceling or closing requisitions in the Requisitions worklet. Workday also enables you to add an accounting date override when closing a requisition.

Additional considerations

When you select Cancel from the related actions menu of a requisition in the Requisitions worklet, Workday now directs you to the Confirm Requisition Cancel page. You can use the Reason and Comments fields on the page to enter a reason code and any comments when canceling a requisition.

When you select Close from the related actions menu of a requisition in the Requisitions worklet, Workday now directs you to the Close Requisition task. You can use the Reason and Comments field on the task to enter a reason code and any comments when closing a requisition. You can also use the Accounting Date Override field on the Close Requisition task if you have accounting enabled when you close a requisition.

https://doc.workday.com/release-notes/en-us/smreq/8432331.html

Add Reasons and Comments for Canceling or Closing Requisitions in the Requisitions Worklet, continued

What do I need to do

1. (Optional) Use the Maintain Procurement Reasons task to configure reason codes for these requisition activities:

- Requisition – Cancel.
- Requisition – Close.

What happens if I do nothing

If you don't have reason codes configured:

- You won't be able to enter reasons when you cancel or close a requisition.
- You'll only be able to enter comments when you close or cancel a requisition.

https://doc.workday.com/release-notes/en-us/smreq/8432331.html

Manually Close and Reopen Requisition Lines

What's changing

With this update, Workday enables you to close individual requisition lines while keeping the partially sourced requisition open. You can now also reopen closed lines manually.

Additional considerations

Workday delivers the new Close Lines and Reopen Lines related actions (secured to the Process: Requisition - Close domain) on the related actions menu for a requisition.

Workday also renames these related actions on the related actions menu for a requisition in the Requisitions worklet:

- Cancel Requisition to Cancel.
- Close Requisition to Close.

Workday delivers these new report fields on the Requisition Line business object that you can use in custom reports:

- Reopened By.
- Reopened Date.

https://doc.workday.com/release-notes/en-us/smreq/7614816.html

Manually Close and Reopen Requisition Lines, continued

Additional considerations

- Requisition Line Closed

Workday also updates these report fields on the Reason Code Transaction Detail Abstract business object to now include information from closed requisition lines:

- Closed Date.
- Reason Code.
- User Who Closed.

https://doc.workday.com/release-notes/en-us/smreq/7614816.html

Manually Close and Reopen Requisition Lines, continued

What do I need to do

No configuration is needed to access this feature. You can use the Maintain Procurement Reasons task to optionally configure reason codes for closing requisitions.

What do I need to do

If you do nothing, users will still be able to close and reopen requisition lines.

https://doc.workday.com/release-notes/en-us/smreq/7614816.html

Replace All Option for Notes on Supplier Web Services

What's Changing

Workday updates these web services so that you can replace existing supplier notes with new notes:

- Get Supplier
- Submit Supplier

What do I need to do

To use the Replace All functionality for notes, you'll need to generate the most recent version of the Submit Supplier template for the integration or EIB you plan to use this feature on.

Additional Considerations

Workday delivers a new Replace All field on the Submit Supplier web service that deletes all existing supplier notes and replaces them with just the supplier notes on the request.

Also Get Supplier web service retains the existing notes along with newly added notes.

This field is available on Submit Supplier templates for versions 44.0 and later.

What happens if I do nothing

If you do nothing, you won't be able to use the Replace All functionality for notes using the Submit Supplier web services.

https://doc.workday.com/release-notes/en-us/smsupp/8726036.html

Student

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Role-Based Security for Student Cohorts

What's changing

In this release, Workday continues to improve and extend role-based security access for components across Workday Student.

Additional considerations

Workday updates these domains in the Academic Advising functional area to support role-based security for student cohorts:

- Reports: Student Cohorts for Academic Records.
- Reports: Student Cohorts for Academic Records and Applicants.
- Reports: Student Cohorts for Applicants.
- Student Data: Student Cohorts for Applicants.

On these domains, Workday adds Roles – Cohort Collections as an allowed security group types, in addition to the existing allowed security group types.

Users with these roles on these domains can now view and manage cohorts for students they have access to.

https://doc.workday.com/release-notes/en-us/stueng/8368626.html

Automatically available

Verify Participation

What’s changing

Workday updates tasks for verifying participation with a warning that displays if you try to change the attendance status for a registration that already has a grade.

Workday improves user experience by providing clear messages to prevent you from unintentionally clearing out existing grades and last dates of attendance entered from the grade roster.

Additional considerations

Workday adds warning on these tasks to prevent you from causing an error when running the Assign Student Grades for the Student Course Section task:

- Verify Participation.
- Verify Participation for My Course Section.

Workday also adds an error on the Put Verify Participation web service. This update applies to web service v44.0 and later.

This message warns you that changing an attendance status with a recorded grade deletes the last date of attendance on the Assign Student Grades for Student Course section and will present an error.

https://doc.workday.com/release-notes/en-us/sturec/8297263.html

Student – Academic Foundation

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Course Section Capacity

What's changing

Workday updates course section reports to display more details about the available seats in a course section.

Additional considerations

Course Section Definitions for Administrators

Workday updates the course section definition reports that administrators can view from the Find Course Section Definitions report.

Course Sections for Students

Workday updates the View Course Section report that students can view from the Find Course Sections report.

https://doc.workday.com/release-notes/en-us/stucurr/8302319.html

Course Section Capacity, continued

What's changing

Workday updates course section reports to display more details about the available seats in a course section.

Additional considerations

Reporting

Workday delivers these new report fields on the Course Section Definition business object (secured to the Public: Curriculum Management domain) that you can use in custom reports:

- Reserved Seats Available.
- Unreserved Seats Available.
- Waitlist Seats Available.

Workday also delivers a new Reserved Seats Available for Eligibility Rule report field on the Reserved Capacity Line business object (secured to the Public Reporting Items domain) that you can use in custom reports.

https://doc.workday.com/release-notes/en-us/stucurr/8302319.html

Course Section Capacity, continued

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.

You can update your custom reports to use the new report fields.

https://doc.workday.com/release-notes/en-us/stucurr/8302319.html

Find Courses and Course Sections

What's changing

Workday enables you to hide courses with inactive course subjects on reports when searching for courses and course sections.

Additional considerations

Workday adds a new Has Active Course Subjects search facet on these administrator reports, enabling you to filter active and inactive course subjects:

- Find Course Definitions.
- Find Course Section Definitions.

Workday update these student reports to display only active course subjects:

- Find Courses.
- Find Course Sections.

https://doc.workday.com/release-notes/en-us/stucurr/8495570.html

Find Courses and Course Sections, continued

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.

You can update your custom reports to use the new report fields.

What happens if I do nothing

Administrators will notice the new search facets on the course reports.

https://doc.workday.com/release-notes/en-us/stucurr/8495570.html

Inheritance for Academic Policies

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.

Reinheriting the policy from the superior academic unit ensures that you maintain consistency even when there are policy changes at the institutional level. The ability to cancel and reinherit policies gives you more flexibility when configuring policies in your institution's academic structure.

Additional considerations

Workday updates these tasks so that you can now inherit the policy from the superior academic unit:

- Maintain Campus Assignment Policy.
- Maintain Course Unit Type Policy.

When a subordinate academic unit has a different policy than the superior academic unit, you can now configure the superior policy to apply to the subordinate academic unit as of a specified effective date.

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.

https://doc.workday.com/release-notes/en-us/stucurr/8166575.html

Inheritance for Academic Policies, continued

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

There is no change to your existing policies.

https://doc.workday.com/release-notes/en-us/stucurr/8166575.html

Student - Advising

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Academic Progress Evaluation for Future Effective-dated Programs of Study

What's changing

With this release, Workday enables the Academic Progress job to run the night of the effective date of a program of study change. The Student Nightly Orchestration job runs the night of the transaction date of a program of study change. This update ensures that the Academic Progress report displays the most accurate and recent data in order to support degree completion and student success.

Additional Considerations

Workday updates the Academic Progress job to run on the effective date of a future-dated program of study.

With this update, any program of study change ensures that the Academic Progress job runs on the date that the program of study change is effective. The Last Evaluated Date updates on the student's Academic Progress report to reflect the effective date of the program of study.

Workday also updates the Refresh Attendance Plan job to run on the date that the program of study change is effective.

https://doc.workday.com/release-notes/en-us/stuadv/8723612.html

Academic Progress Evaluation for Future Effective-dated Programs of Study, continued

Additional Considerations

NOTE: The Academic Progress job won't run on existing future effective-dated programs of study. The Refresh Attendance Plan job bases its calculation on the Academic Progress job and might not display the student's Financial Aid load status accurately. To prevent any errors, run the Academic Progress job on existing future-dated programs of study on or after the date that the program of study change is effective.

https://doc.workday.com/release-notes/en-us/stuadv/8723612.html

Academic Progress Evaluation for Future Effective-dated Programs of Study, continued

What do I need to do

For existing programs of study that are effective-dated for the future, Workday recommends that you run the Academic Progress job on or after the date that the program of study change is effective.

What happens if I do nothing

The Academic Progress job won’t run on the existing programs of study that are future effective-dated. The Refresh Attendance Plan job, which bases its calculations on the Academic Progress job, might not update the financial aid load status accurately for the existing future effective-dated programs of study.

https://doc.workday.com/release-notes/en-us/stuadv/8723612.html

Transfer Credit Evaluation

What's changing

Workday provides more information about coursework and test results that don't receive transfer credit from transfer credit evaluation processes.

This update makes it easier for you to troubleshoot why a course or test result doesn't receive transfer credit from a transfer credit evaluation. This enables your staff and personnel to support student success and pathways with efficiency and transparency.

Additional considerations

Workday updates these tasks for when you initiate a transfer credit evaluation, and there are external courses or test results with no transfer credit results:

- Initiate Preliminary Transfer Credit Evaluation.
- Initiate Transfer Credit Evaluation.

On these tasks, Workday updates the summary page to now display a new:

- Failure Reason column on the No Credit from Coursework and No Credit from Exams grids, to display the reasons why transfer credit isn't granted.
- Transfer Credit Troubleshooting button that enables you to access the transfer credit troubleshooting console for the external record.

https://doc.workday.com/release-notes/en-us/stuops/8455726.html

Transfer Credit Evaluation, continued

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.

https://doc.workday.com/release-notes/en-us/stuops/8455726.html

Educational Institution Course Web Services

What's changing

Workday enhances the web service functionality for importing educational institution courses.

This feature makes it easier for you to maintain educational institution course catalogs by reducing the time it takes to import multiple courses.

Additional considerations

Workday improves performance of these web services:

- Bulk Import Put Educational Institution Course.
- Put Educational Institution Course.

To import a high volume of educational institution courses, Workday recommends that you use the Bulk Import Put Educational Institution Course web service.

https://doc.workday.com/release-notes/en-us/stuops/7861465.html

Educational Institution Course Web Services, continued

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.

https://doc.workday.com/release-notes/en-us/stuops/7861465.html

Student – Campus Engagement

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Dates and Times on Sent Engagement Items

What's changing

With this update, Workday now displays the intended recipients and the intended delivery dates and times of engagement items.

Additional considerations

When viewing a student engagement item from the Student History tab of the History profile group, users can now view new For and Sent Date and Time fields.

https://doc.workday.com/release-notes/en-us/stueng/8368618.html

Automatically available

Run as User for Student Cohorts

What's changing

With this release, Workday gives you the ability to select an integration system user as a Run as User, deliver a report field that enables you to more easily see whether a student cohort has an invalid Run as User, and deliver updates to the Edit Student Cohort Run as User task.

The Edit Student Cohort Run as User task now gives you the ability to search for a specific user and edit their role as Run as User on all of their cohorts, saving you the time and effort of editing individual cohort to remove a specific Run as User.

The new Invalid Run as User report field enables you to see which dynamic cohorts have invalid Run as Users at a glance.

Additional considerations

Workday adds a new Run as User prompt to the Edit Student Cohort Run as User task (secured to the Manage: Student Cohort Run As User domain), enabling you to search for a specific user and replace their assignment as Run as User for any cohort they are in.

Additionally, Workday now enables you to assign the Run as User role to an integration system user (ISU) on a student cohort. You can now select ISUs as the Run as User on the Create Student Cohort task (secured to the Manage: Student Cohort domain) and import dynamic cohorts with ISUs as the Run as User with the Import Criteria Based Student Cohorts web service (secured to the Manage: Student Cohort domain).

https://doc.workday.com/release-notes/en-us/stueng/7614480.html

Run as User for Student Cohorts, continued

Additional considerations

Workday also delivers a new Invalid Run as User report field on the Student Cohort business object (secured to the Student Data: Student Cohorts for Academic Records domain) that you can use in custom reports to identify invalid Run as Users for dynamic cohorts.

https://doc.workday.com/release-notes/en-us/stueng/7614480.html

Student – Financial Aid

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Freeze Load Status for Financial Aid

What's changing

Workday delivers an enhancement to the Refresh Attendance Plan mass action enabling you to refresh the load status as of the current standard academic period. We also update the Refresh Attendance Plan job in the Student Nightly Job Orchestration to prevent the load status of the past academic periods from updating retroactively.

Additional Considerations

Workday updates the Refresh Attendance Plan mass action on the Run Student Financial Aid Processes by Applicant and Run Student Financial Services Processes by Student reports to enable you to refresh the load status:
As of the current standard academic period.
For all standard academic periods including the past academic periods.
As of the standard academic period of the effective date.
When you refresh the load status as of the standard academic period of the effective date, Workday determines the standard academic period based on the standard end date.
Workday also updates the Refresh Attendance Plan job in the Student Nightly Job Orchestration to prevent the financial aid load status for past academic periods from updating retroactively. This is equivalent to using the Refresh Attendance Plan mass action to refresh the load status as of the current standard academic period.

https://doc.workday.com/release-notes/en-us/stufad/8054795.html

Freeze Load Status for Financial Aid, continued

What do I need to do

When you use the Refresh Attendance Plan mass action, Workday recommends that you refresh the load status as of the current standard academic period to prevent the load status of past academic periods from refreshing.

When you refresh load status for past academic periods, you might want to rerun these tasks:

- Package Merit Financial Aid.
- Package Need Financial Aid.
- Evaluate Satisfactory Academic Progress.

You don’t need to do anything for the Refresh Attendance Plan process in the Student Nightly Job Orchestration.

What happens if I do nothing

When you use the Refresh Attendance Plan mass action, by default, Workday refreshes the load status as of the current standard academic period unless you select the respective options to refresh the load status:

For all standard academic periods.

As of the standard academic period of the effective date.

https://doc.workday.com/release-notes/en-us/stufad/8054795.html

Filter Active Students on the Run Student Financial Services Processes by Student Report

What's changing

With this update, Workday enables you to run mass actions on the Run Student Financial Services Processes by Student report for students with active reporting academic records using a new report data source (RDS) filter.

Additional Considerations

Workday delivers a new Active Reporting Academic Records RDS filter on the Financial Aid Records RDS that you can use in custom reports. This enables you to process only active students when you refresh the attendance plan for students using the Run Student Financial Services Processes by Student report and thus reduces the overall processing time.

- Active students include those who have either the current or any future financial aid record snapshot that has a reporting academic record with any of these program of study statuses:
- In Progress.
- Leave of Absence.
- Matriculated.
- Pending Change & Completion.

https://doc.workday.com/release-notes/en-us/stufad/8171553.html

Filter Active Students on the Run Student Financial Services Processes by Student Report, continued

What do I need to do

To use the new RDS filter in a custom report:

Copy the Run Student Financial Services Processes by Student report.

- From the Data Source Filter prompt, select Active Reporting Academic Records.

https://doc.workday.com/release-notes/en-us/stufad/8171553.html

Institutional Student Information Records (ISIRs)

What's changing

With this release, Workday updates ISIR layout field names to align with the Department of Education (ED) guidelines for the 2024-2025 financial aid award year and later.

Additional Considerations

For consistency with the 2024-2025 ISIR layout updates, Workday renames these fields that display on the Supplemental Data tab when you edit or view a student's ISIR for the 2024-2025 award year and later:

- Max Pell Indicator to Maximum Pell Indicator.
- Other Parent Signed Indicator to Parent Spouse or Partner Signature Source.
- Parent Signed Indicator to Parent Signature Source.
- Student Signed Indicator to Student Signature Source.
- Student Spouse Signed Indicator to Student Spouse Signature Source.

In addition, Workday renames the Max Pell Indicator prompt on the Calculate SAI task to Maximum Pell Indicator.

https://doc.workday.com/release-notes/en-us/stufad/8176645.html

Institutional Student Information Records (ISIRs), continued

What do I need to do

Workday delivers this new and updated functionality automatically.

https://doc.workday.com/release-notes/en-us/stufad/8176645.html

Master Promissory Notes (MPNs)

What's changing

With this release, Workday updates the Common Origination and Disbursement (COD) information on a student's federal loan award to display expanded information based on the MPN status. Workday also updates:

- How endorsed MPNs display.
- The logic used for completing action items via integration if the autocomplete criteria is Direct Loan Stafford Master Promissory Note Completed.
- How the MPN expiration date impacts award disbursement for loans spanning multiple academic periods.

Additional Considerations

COD Information

Workday now enables you to view important MPN information in these COD fields on student awards for federal loans:

- MPN Expiration Date displays the expiration date of MPNs with a status of Accepted or Inactive due to the linking of a PLUS loan with an endorser.
- MPN Linked indicates if an accepted, endorsed, or pending MPN is linked through COD.
- MPN Status Code displays the status code of the MPN.

Endorsed MPNs

Workday now displays endorsed MPNs only on awards to which they are linked.

https://doc.workday.com/release-notes/en-us/stufad/8164311.html

Master Promissory Notes (MPNs), continued

Additional Considerations

MPN Action Items

Workday updates how MPN action items are automatically completed for existing MPNs. During financial aid packaging, if an accepted or pending MPN exists for the borrower, Workday automatically completes the action item.

MPN Expiration Dates

Workday updates how the MPN expiration date impacts award disbursement for loans spanning multiple academic periods. If a student accepts a loan for multiple academic periods in a single sequence and the accepted MPN expires after the initial disbursement, Workday will continue to release disbursements for all academic periods in the sequence.

https://doc.workday.com/release-notes/en-us/stufad/8164311.html

Master Promissory Notes (MPNs), continued

What do I need to do

Workday delivers this new and updated functionality automatically.

https://doc.workday.com/release-notes/en-us/stufad/8164311.html

Run Student Financial Processes Reports

What's changing

With this release, Workday delivers updated report descriptions, new report fields, and enhanced search functionality for the Run Student Financial Processes reports.

Additional Considerations

Report Descriptions and Search Options

For clarity and consistency, Workday provides updated descriptions for these reports to better distinguish the available actions.

In addition, you can now:

- Search for students and applicants on these reports by preferred name, academic person ID, and universal ID, giving you a better user experience for selecting students and applicants for processing.
- Use the new Student Cohorts prompt on the Run Student Financial Aid Processes by Period report to include student cohort types in your search.

https://doc.workday.com/release-notes/en-us/stufad/7954259.html

Run Student Financial Processes Reports, continued

What do I need to do

Workday delivers this new and updated functionality automatically.

https://doc.workday.com/release-notes/en-us/stufad/7954259.html

PLUS Loans: Relationship to Student Field

What's changing

Workday adds the Relationship to Student reportable field for PLUS loan applications. You can select one of these values from the Relationship to Student field:

- Biological Parent of the Dependent Undergraduate Student.
- Legal Adoptive Parent of the Dependent Undergraduate Student.
- Spouse of the Biological or Legal Adoptive Parent of the Dependent Undergraduate Student and am considered to be a parent in accordance with the instructions on the Free Application for Federal Student Aid (FAFSA) for reporting my income and assets on the FAFSA.
- Other.

Additional Considerations

Inbound Integration

Workday adds the <RelationshipToStudent> tag for the COD PLUS Loan Credit Status Inbound integration. This 1-character string can have 1 of these values:

- P (Parent).
- A (Adoptive Parent).
- S (Spouse).
- O (Other).

Web Service

Workday adds the <RelationshipToStudent> tag for PUT and GET operations of the Import Student Loan Applications web service.

https://doc.workday.com/release-notes/en-us/stufad/7774305.html

PLUS Loans: Relationship to Student Field, continued

What's changing

You can view the Relationship to Student field on these tasks:

- Create PLUS Loan Application.
- View PLUS Loan Application.
- Edit PLUS Loan Application.

https://doc.workday.com/release-notes/en-us/stufad/7774305.html

Automatically available

Student Financial Aid Secure Report Fields

What's changing

Workday delivers contextually secure report fields to replace the retiring report fields.

Additional considerations

Workday delivers a new Academic Level report field on the Student Aid business object (secured to the Set Up: Academic Structure domain) that you can use to view the academic level for the student of the active ISIR by award year. This report field replaces Academic Levels (Do Not Use) on the same business object secured to the same domain.

Workday also delivers these new report fields (secured to the Reports: Programs of Study domain) that replace report fields with the same name that are marked as Do Not Use:

https://doc.workday.com/release-notes/en-us/stufad/8456879.html

Student Financial Aid Secure Report Fields, continued

Additional considerations

Primary Program of Study on the Financial Aid Period Record business object. You can use this report field to view the academic level of the primary POS of the reporting record or the application for matriculated students and applicants, respectively, for the ending academic period of the financial aid period record.

Primary Program of Study on the ISIR Transaction business object. You can use this report field to view the primary POS for the financial aid record.

https://doc.workday.com/release-notes/en-us/stufad/8456879.html

Student Financial Aid Secure Report Fields, continued

What do I need to do

Workday recommends that you replace the old report fields on any custom reports and start using the new ones.

https://doc.workday.com/release-notes/en-us/stufad/8456879.html

Automatically available

Alternative Loan Processing and Matching Logic

What's changing

With this release, Workday updates alternative loan processing providing accuracy in financial aid packaging. Workday also updates matching logic on the Alternative Loan Application Send Response Inbound integration template preventing misalignment of alternative loan records with lenders and improving the efficiency of matching students with alternative loan applications.

Additional considerations

To help ensure accuracy in financial aid packaging, Workday removes the ability to add or make updates to private alternative loans on the student's Total Financial Assistance (TFA) report. For clarity, we deliver new error messages to route you to the correct tasks when you attempt to add an alternative loan or make updates in these fields on the report:

- Current Award Year Amount.
- Current Period Amount.
- Student Award Status.

You are still able to manually add and make updates to institutional loans.

https://doc.workday.com/release-notes/en-us/stufad/8164305.html

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Alternative Loan Processing and Matching Logic, continued

Additional considerations

Workday also updates our subsequent alternative loan matching logic enabling you to package alternative loans more quickly and efficiently. Now, when Workday receives an inbound certification request, we match the loan application to the student's record based on this order of validations:

- Social Security Number (SSN) + Date of Birth (DOB).
- Name + SSN.
- Name + DOB.

https://doc.workday.com/release-notes/en-us/stufad/8164305.html

Alternative Loan Processing and Matching Logic, continued

What do I need to do

Workday delivers this new and updated functionality automatically.

https://doc.workday.com/release-notes/en-us/stufad/8164305.html

Action Items: Added Flexibility with Assigning Holds for Business Processes

What’s changing

Workday now provides you with more flexibility in applying ISIR action item holds for these Student Aid Verification Event (SAVE) business processes (BPs):

- Ad-hoc Action Items Event.
- Federal Verification Event.
- ISIR Action Items Event.
- Professional Judgment Event.

Additional considerations

Business Processes

Workday now allows the aforementioned SAVE BPs to use the Apply Student Hold service and Remove Student Hold service.

User Interface

In a student's Action Items and Holds profile group, the Active Holds report now shows more descriptive information about holds, including the hold reason, hold history, and resolution instructions.

https://doc.workday.com/release-notes/en-us/stufad/8426423.html

Action Items: Added Flexibility with Assigning Holds for Business Processes, continued

What do I need to do

Ensure that you create unique holds for each BP to prevent potential conflicts between concurrently running BPs with the same hold type and hold reason.

What happens if I do nothing

Although Workday doesn't recommend it, you can still use the existing Setup Student Holds service until we fully retire it in September 2026.

https://doc.workday.com/release-notes/en-us/stufad/8426423.html

Period-Based Class Standing Calculation

What's changing

Workday enhances the period-based class standing calculation to improve the accuracy of class standing for students whose reporting academic record changes.

Additional considerations

To calculate period-based class standing for students, Workday takes into account all the completed academic periods that fall within the start date of the academic record and the standard start date of the current financial aid period record. This provides you with an accurate class standing when a student's reporting record changes when they progress from undergraduate to graduate program of study.

The new period-based class standing calculation also:

- Counts nonstandard academic periods, if you have configured the class standing policy to include nonstandard academic period types.
- Considers only the class standing override for the academic periods of the current academic record, and disregards overrides for the previous academic record.

https://doc.workday.com/release-notes/en-us/stufad/8465847.html

Period-Based Class Standing Calculation, continued

What do I need to do

The enhancement to the period-based class standing calculation is available automatically.

To identify students impacted by the enhancement, access the previously delivered View Students with Multiple Academic Records and Period-Based Class Standing task (secured to the Manage: Financial Aid Attendance Plan domain):

- In Production to view the students' current class standing.
- In Preview to view the students’ class standing based on the updated calculation.

Workday recommends that you access the task before Workday delivers the calculation enhancement to Production in 25R1. Once it is delivered in Production, the results of the task in Production and Preview will be the same.

What happens if I do nothing

Security groups who already have View or, View and Modify permissions for tasks on the Manage: Financial Aid Attendance Plan domain can access the View Students with Multiple Academic Records and Period-Based Class Standing task.

https://doc.workday.com/release-notes/en-us/stufad/8465847.html

Student Core

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Role-Based Security for Military Details

What's changing

In this release, Workday continues to improve and extend role-based security access for components across Workday Student.

Additional considerations

To support role-based security for students' military details, Workday updates the Student Data: Military Details domain.

https://doc.workday.com/release-notes/en-us/stucore/8368635.html

Automatically available

Hide Military Details on Student Profile

What's changing

With this update, Workday hides the Military Details profile group on students' profiles after setting their military relationships to No and verifying they have no historical military data in Workday.

Additional considerations

If a student has no historical military data and has their military relationship set to No, Workday no longer displays the Military Details profile group on the student's profile or display the Military Details report on these tasks:

- Change Student Residency.
- Update Student Residency.
- View Residency Status.
- View Student Residency Record.
- View Student Residency Snapshot.

Workday also updates the Put Veteran Benefits web service to prevent you from adding or updating students' military details when they don't have a military relationship.

https://doc.workday.com/release-notes/en-us/stucore/8368639.html

Automatically available

UDMF Reporting for Workday Student

What's changing

With this release, Workday continues to improve Unified Duplicate Management Framework (UDMF) capabilities.

Workday enables you to report on the Organization and Academic Unit associated with a student.

Additional considerations

Workday delivers these new report fields on the Person Duplicate Record and Merged Records for Person business objects (secured to the Manage: Duplicate Records for the Tenant domain):

- Source - Student Entry Method.
- Source - Student Academic Units.
- Source has Multiple Student Academic Units.
- Source - Institutions.
- Source has Multiple Institutions.
- Target - Student Academic Units.
- Target has Multiple Student Academic Units.
- Target - Student Entry Method.
- Target - Institutions.
- Target has Multiple Institutions.

https://doc.workday.com/release-notes/en-us/stucore/8595363.html

Duplicate Management for Student Onboarding Events

What’s changing

Workday updates the Unified Duplicate Management Framework to enable you to merge student and prospect records that have in-progress Student Onboarding events.

This streamlines processes by enabling you to merge regardless of action items that students have yet to complete.

Additional considerations

Workday now enables you to merge these in-progress business process events:

- Student Onboarding.
- Continuing Student Registration Onboarding.

You can perform this action for these role combinations:

- Student Prospect to Student Prospect.
- Student Prospect to Matriculated Student.
- Student Prospect to Worker.
- Matriculated Student to Worker.

https://doc.workday.com/release-notes/en-us/stucore/8265070.html

Student Finance

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Student Payment Precedence Charge Item Selection

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, we:

- Rename the Exclusion field to Charge Item Exclusion.
- Add a new Charge Item Inclusion field.
- No longer require an entry in the Charge Type field. You can now enter a Charge Type, a Charge Item Inclusion, or both.
- Now only enable you to select options in the Charge Item Exclusion field that match Charge Items of the selected Charge Type.
- Update the precedence line logic to now only apply excluded items to that specific Charge Type row.

https://doc.workday.com/release-notes/en-us/stufin/7733919.html

Student Payment Precedence Charge Item Selection, continued

Additional Considerations

Exclusion Rule Data Conversion

For current Workday Student Financials customers, we also add these new columns to the Payment Application Precedence Groups Configuration grid of the Maintain Student Payment Precedence Groups task:

- Charge Item Exclusions added by Conversion.
- Charge Item Exclusions removed by Conversion.

We convert your current payment precedence groups to comply with the requirements above by:

- Adding charge item exclusions to your precedence groups where charge item exclusions weren't specified.
- Removing charge item exclusions that don't match the charge type for that precedence group line.

https://doc.workday.com/release-notes/en-us/stufin/7733919.html

Student Payment Precedence Charge Item Selection, continued

Additional Considerations

NOTE: For new Student Financials customer implementations after 2025R1, this conversion doesn't apply.

Payment Precedence Web Services

On the Get Student Precedence Group Rule Set and Put Student Precedence Group Rule Set web services, we:

- Rename the Exclusion field to Charge Item Exclusion.
- Add a new Charge Item Inclusion field.

On the Put Student Precedence Group Rule Set web service, we also:

- No longer require an entry in the Charge Type field.
- You can now specify a Charge Type, a Charge Item Inclusion, or both.

https://doc.workday.com/release-notes/en-us/stufin/7733919.html

Student Payment Precedence Charge Item Selection, continued

Additional Considerations

Now only enable you to specify options in the Charge Item Exclusion field that match Charge Items of the selected Charge Type.

Now require 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.

https://doc.workday.com/release-notes/en-us/stufin/7733919.html

Student Payment Precedence Charge Item Selection, continued

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.

https://doc.workday.com/release-notes/en-us/stufin/7733919.html

Cancel Charges for Academic Period

What's changing

Workday now enables you to cancel charges for a student for an academic period.

Additional considerations

Workday delivers a new Cancel Charges Only check box on the Cancel and Reassess Student Charges task enabling you to cancel all charges created using the Assign Student Charges job for a student for an academic period. You can access this feature from the related actions menu of a student's Student Financials Period Record or from the global search.

https://doc.workday.com/release-notes/en-us/stufin/8382486.html

New Student Waiver Experience

What’s changing

Workday delivers enhanced configuration options for assigning waivers. Workday delivers new waiver item rules and assignments to replace the current student waiver items for eligibility and amount calculation functionality. This additional configuration enables you to effective-date and assign waivers based on your program of study and program focus configuration.

Additional considerations

With this new approach to waiver assignments:

Workday assigns waiver payments for eligible students when you configure a waiver item rule with a valid amount on a waiver item assignment with valid eligibility criteria.

Workday only assigns waiver payments to eligible students with a correct academic unit or program of study configuration specified on the assignment policy.

When you change the configuration of student waiver item assignments and waiver item rules, without maintaining a waiver item assignment with a new effective date in the future, or you change a charge that is relevant to waiver amount rules, Workday adjusts previously assigned waiver payment amounts.

https://doc.workday.com/release-notes/en-us/stufin/8410666.html

New Student Waiver Experience, continued

Additional considerations

Workday has created waiver item assignments with the effective date of 01-01-2000 based on existing waiver items, but going forward, Workday recommends that you create waiver item assignments as of the standard start date of an academic period for which you want to assign waiver payments.

https://doc.workday.com/release-notes/en-us/stufin/8410666.html

New Student Waiver Experience, continued

What do I need to do

Going forward, to edit an existing waiver item assignment dated 01-01-2000 and:

Adjust a waiver payment amount, edit the student waiver rule linked to the relevant waiver item.

Change the eligibility calculation, edit the calculation on the waiver item assignment and waiver item assignment line.

Going forward, to edit waiver item assignments in a current or future academic period, and create new assignment policies for a new effective date, create the assignment policy for the standard start date of the academic period in which you want to assign waiver payments based on the new configuration.

What happens if I do nothing

Workday has converted eligibility and amount calculations from waiver items to waiver item assignments and waiver item rules. Waiver payments assigned from existing waiver items will continue to behave as expected.

Existing waiver payments will remain the same. All assignments will remain effective-dated from 2000-01-01.

Accounting for waiver payments will continue to work as expected.

https://doc.workday.com/release-notes/en-us/stufin/8410666.html

Student Financials Policy Management

What's changing

Workday Student updates the Student Financials Policy Management functionality, enabling you to cancel and re-inherit your Academic Unit (AU) Policies from Superior AUs.

Additional considerations

Workday updates these tasks:

- Maintain Course Attempt Limit for Student Charges Policy.
- Maintain Student Financials Reaction Policy.
- Maintain Student Wash Period Policy.

By adding these new sections and their new and updated options to:

- The What would you like to do? section.
- Rename the Effective Date option to As of Effective Date and move it to this section.

NOTE: You can only reinherit a policy from a superior academic unit when the policies are equivalent, with the same options configured.

https://doc.workday.com/release-notes/en-us/stufin/7733975.html

Student Records

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Course Waitlist Policy Configurations

What’s changing

With this release, Workday adds additional configuration options when you create and edit course waitlist policies. You can now enable Workday to send waitlist promotion notifications to students with the registration restrictions that you select. You can also specify how Workday should manage students who don't respond to waitlist promotion notifications.

When you configure Workday to send waitlist promotion notifications to students with registration restrictions, you provide them with an opportunity to resolve their restrictions and register for the courses that they need. By enabling students to independently resolve their registration issues first, workday reduces manual effort for you.

Additional Considerations

Maintain Course Waitlist Policy Task

To provide you with more options when you configure course waitlist policies, Workday adds new Students with Registration Restrictions section to the Maintain Course Waitlist Policy task.

For improved clarity on the task, Workday also:

- Moves the Auto Promotion and Expiration options to the new Student Eligible for Course Registration section.
- Renames the Waitlist Method section to Waitlist Promotion Method.

For consistency, Workday now also displays those changes when you view course waitlist policies from the:

https://doc.workday.com/release-notes/en-us/stureg/8628615.html

Course Waitlist Policy Configurations, continued

What’s changing

Additionally, Workday also reduces manual effort for you when you configure how Workday should manage students who don't respond to waitlist promotion notifications.

Additional considerations

- Academic Unit Policy Viewer report.
- The related actions preview of any course waitlist policy snapshot.

Workday also delivers a conversion for existing course waitlist policies to populate the new configuration options. Policies configured with Auto Promotion now prevent students with registration restrictions from receiving waitlist promotion notifications by default.

Policies configured with Expiration now enable waitlist promotion notifications for students with these registration restrictions:

- Duplicate registration exists.
- Enrollment unit maximum.

https://doc.workday.com/release-notes/en-us/stureg/8628615.html

Course Waitlist Policy Configurations, continued

Additional considerations

- Incomplete cluster registration.
- Require corequisite.
- Repeat attempt limit exceeded.
- Time conflict.

Reporting Items for Course Waitlist Policies

Workday updates the Waitlist Promotion Method report field on the Course Section Definition business object to now include the new configuration options on course waitlist policies.

Workday also delivers a new Restrictions Not Preventing Waitlist Notifications report field on the Student Course Registration Record business object (secured to the Reports: Course Registrations domain) that you can use in custom reports.

https://doc.workday.com/release-notes/en-us/stureg/8628615.html

Course Waitlist Policy Configurations, continued

Additional considerations

For consistency, Workday also renames the Restrictions on Waitlisted Registrations report field on the Student Course Registration Record business object to Restrictions Preventing Waitlist Notifications.

These changes enable you to create custom reports on the new configuration options on course waitlist policies.

Web Services for Course Waitlist Policies

Workday updates these web services to support the new configuration options on course waitlist policies:

- Get Course Waitlist Policies.
- Put Course Waitlist Policy.

To use this functionality, you must update the web service to v44.0 or later.

https://doc.workday.com/release-notes/en-us/stureg/8628615.html

Course Waitlist Policy Configurations, continued

What happens If I do nothing

If you do nothing, Workday continues to manage waitlisted students based on your existing course waitlist policies. Policies configured with Auto Promotion will prevent students with registration restrictions from receiving waitlist promotion notifications by default.

Policies configured with Expiration will enable waitlist promotion notifications for students with these registration restrictions:

- Duplicate registration exists.
- Enrollment unit maximum.
- Incomplete cluster registration.
- Require corequisite.
- Repeat attempt limit exceeded.
- Time conflict.

https://doc.workday.com/release-notes/en-us/stureg/8628615.html

Course Registration Reports

What’s changing

With this release, Workday improves the user interface on course registration reports to make it easier for students to manage their course registrations.

Additional considerations

Registering for Courses

When students are waitlisted while attempting to register for a course, Workday now displays a Drop button that they can use to immediately remove themselves from that waitlist. This helps students manage their courses more efficiently.

Viewing Course Registrations

For clarity, Workday adds a new Waitlisted Date column on the My Waitlisted Courses grid on the View My Courses and View Student Enrollments reports. On the same grid, Workday also moves these columns:

- Registration Status to display after the Section column.
- Units and Grading Basis to display after the new.

https://doc.workday.com/release-notes/en-us/stureg/8327556.html

Course Registration Reports, continued

What's changing

With this release, Workday improves the user interface on course registration reports to make it easier for students to manage their course registrations.

Additional considerations

Waitlisted Date column.

On the My Enrolled Courses grid on the same reports, Workday also moves the:

- Drop and Withdraw buttons to a new Actions menu. For students viewing their own courses, Workday also displays a Swap option in that menu.
- Registration Status column to display after the Section column.

On both those grids on the same reports, Workday also moves the Action column to display after the Course Listing column.

https://doc.workday.com/release-notes/en-us/stureg/8327556.html

Course Registration Reports, continued

What's changing

With this release, Workday improves the user interface on course registration reports to make it easier for students to manage their course registrations.

Additional considerations

Drop Without Record End Date Date Control

Workday now enables students to access the Drop Student Course Registration task for courses that they're on waitlists for, even after the date configured for the Drop Without Record End Date date control. This enables students to remove themselves from waitlists any time before grades are submitted, reducing manual effort for you.

For consistency, Workday also updates the Put Student Course Dropped Registration web service to also support removing students from course section waitlists after the date configured for the Drop Without Record End Date date control.

Note: To use this functionality, you must update the web service to v43.0 or later.

https://doc.workday.com/release-notes/en-us/stureg/8327556.html

Registration Troubleshooting Console Report

What’s changing

With this release, Workday provides you with additional information when you troubleshoot registrations for students.

By displaying more information to you at once, Workday enables you to help students with their course registrations more efficiently.

Additional considerations

To provide you with more information on how specific course sections can affect a student’s enrollment unit limit, Workday now displays these new fields on the Registration Troubleshooting Console report:

- Maximum Units.
- Enrolled Units.
- Additional Units From This Course Section.

On the same task, Workday also delivers a new Can Repeat field on the Summary tab that you can use to determine whether a student can repeat the selected course and course sections.

These changes provide you with more clarity when you help students troubleshoot registrations.

https://doc.workday.com/release-notes/en-us/stureg/8703756.html

Automatically available

Course Versions for Student Registration Management

What's changing

With this release, Workday now displays course information based on the course effective date that falls within the academic period of the course registrations you create and view.

This provides you with the information that's most relevant to students, enabling you to register students for courses and help them manage existing course registrations more easily.

Additional considerations

When you access these tasks, Workday now displays course information based on the course effective date that falls within the academic you select for the course registration:

- Register Student for Course.
- Maintain Registration Restriction Overrides for Student.
- Register Student from Waitlist.
- Register Student from Section Waitlist.
- Waitlist Student in Course.

Workday also updates these tasks to display course information based on the course effective date that falls within the academic period of the selected course registration:

https://doc.workday.com/release-notes/en-us/stureg/8341918.html

Automatically available

Course Versions for Student Registration Management, Continued

Additional considerations

- Drop Student from Course.
- Drop from Course Section.
- Drop Courses for Student.
- Mass Drop Invalid Student Registrations.
- Override Repeated Courses for Student.
- Reassign Course Registrations.
- Registration Troubleshooting Console.
- Remove Student from Waitlist.
- Remove Student from Section Waitlist.

By no longer displaying course information based on the current academic in which you’re viewing the course, Workday provides you with course information that’s most relevant to students.

https://doc.workday.com/release-notes/en-us/stureg/8341918.html

Automatically available

Course Versions for Student Registration Management, Continued

Additional considerations

Note: Workday continues to display course information as of the current academic period on the prompts within the tasks above.

https://doc.workday.com/release-notes/en-us/stureg/8341918.html

Roll Over Academic Period Registration Appointments

What's Changing

You can now roll over existing registration appointment configurations from 1 academic period to another.

This enables you to configure registration appointments for upcoming academic periods more efficiently and with fewer clicks.

Additional considerations

Workday delivers a new Roll Over Registration Appointments From prompt on the Maintain Academic Period Registration Appointments task that displays when you select an academic period that doesn’t have any configured registration appointments. This enables you to prepopulate registration appointments for your selected academic period from another academic period with existing registration appointments.

Workday also delivers a new Source Academic Period report field on the Registration Appointment business object (secured to the Manage: Registration domain) that you can use in custom reports.

https://doc.workday.com/release-notes/en-us/stureg/8365560.html

Talent Management

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Hide Inactive Learning Content from Global Search

What's Changing

Workday now excludes all inactive learning content from the global search results for users with the Learning Admin access.

What do I need to do

This feature is automatically available.

Additional Considerations

If you mark a learning content as inactive, the content won't display for you in the global search results.

Inactive content will still be visible in the **Manage Learning Content** standard report or other custom reports for learning content.

What happens if I do nothing

Your global search results still won't show inactive learning content.

https://doc.workday.com/release-notes/en-us/lrn/8763064.html

Automatically available

AI Summarization of Content Feedback

What's Changing

With this release, you can use Generative AI (GenAI) to summarize user feedback comments on learning content.

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.

Additional Considerations

Workday adds a new AI Summarized Feedback tab on the administrator view of the learning content. The new tab is secured to these domains:

- Manage: Learning Content.
- Self-Service: Learning Instructor.
- Self-Service: On the Job Training.
- Set Up: Learning Catalog.

From the AI Summarized Feedback tab, administrators, assessors, and instructors with access to the learning content can use the Generate Summary button to generate a summary of the feedback comments in English.

With this release, Workday also updates the Edit Tenant Setup - HCM task to add a Disable AI Summarized Feedback option. You can select this option to hide the AI Summarized Feedback tab.

https://doc.workday.com/release-notes/en-us/lrn/7818732.html

AI Summarization of Content Feedback, continued

Additional Considerations

Reporting:

Workday delivers these report fields on the Learning Content business object:

- AI Generated Feedback Summary.
- Feedback Summary.
- Feedback Summary Generated By.
- Feedback Summary Generated Date.
- Source Feedback Comments.

All the report fields are secured to these domains**:**

- Manage: Learning Content.
- Self-Service: Learning Instructor.
- Self-Service: On the Job Training.
- Set Up: Learning Catalog.

https://doc.workday.com/release-notes/en-us/lrn/7818732.html

AI Summarization of Content Feedback, continued

What do I need to do

Summary of content feedback is automatically available, but to ensure you have access to it, the tenant must be opted in to Machine Learning and Activity Stream for internal content needs to be enabled

https://doc.workday.com/release-notes/en-us/lrn/7818732.html

Automatically available

Surveys Migration

What's Changing

Workday's Surveys feature no longer uses Presentation Services (also known as VPS). Workday now migrates the existing surveys to a new platform.

Additional Considerations

Self-Service: Take Surveys Domain

Workday delivers a conversion that automatically enables the Modify permission on the Self-Service: Take Surveys domain to prevent any errors that might interrupt successful survey completion.

Survey User Interface

When accessing all surveys, including existing surveys, your users will now find a modified user interface and survey completion message.

You'll also find an additional preview completion page when previewing surveys.

https://doc.workday.com/release-notes/en-us/lrn/8632008.html

Surveys Migration, continued

What’s Changing

The surveys in the new platform are automatically available to your users.

Additional Considerations

Your users can still complete surveys without any interruptions.

https://doc.workday.com/release-notes/en-us/lrn/8632008.html

Email Validation for External Learning Users

What's Changing

This release introduces email validation for external learning users to enhance data accuracy and prevent errors associated with known invalid email domains.

Additional Considerations

Workday updates these tasks to add a validation that prevents users from entering known invalid email domains:

- Create ~External Learning User~.
- Edit My Personal Information.
- Edit ~External Learning User~.
- Review ~External Learning User~.
- Revise ~External Learning User~.
- Request ~Extended Enterprise Learner~.
- Request Edit ~Extended Enterprise Learner~.
- Revise Request ~Extended Enterprise Learner~.

https://doc.workday.com/release-notes/en-us/lrnext/8578045.html

Email Validation for External Learning Users, continued

Additional Considerations

Web Services:

Workday also updates the Manage External Learning User web service (v44) to include this validation.

Note: The email validation applies to all external learning users, even for customers who do not use Extended Enterprise but are creating external learning users to set up external trainers.

https://doc.workday.com/release-notes/en-us/lrnext/8578045.html

Email Validation for External Learning Users, continued

What Do I Need to Do?

Nothing, this feature is automatically available.

https://doc.workday.com/release-notes/en-us/lrnext/8578045.html

Candidate Home Usability

What's changing

Workday updates Candidate Home to improve the user experience for candidates completing disability status and government ID tasks.

What do I need to do

No steps need to be taken. This feature is automatically available for candidates.

Additional considerations

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

What happens if I do nothing

Candidates accessing any of the tasks on Candidate Home will see the changes.

https://doc.workday.com/release-notes/en-us/cxs/8758833.html

Automatically available

Advance Steps in the Assess Skills Business Process

What's changing

Workday improves business process management for skill assessments.

Additional considerations

Workday now enables you to advance steps of the Assess Skills business process before the steps are complete.

You can advance steps:

- Manually by accessing individual in-progress skill assessments.
- Using the Mass Advance Business Process task.
- Using the Mass Operation Management task.

What do I need to do

- Set up Skills Cloud.
- To initiate the Mass Advance Business Process task, you must be in a security group with access to the Manual Advance action in the Who Can Do Actions on Entire Business Process section of the business process security policy.

What happens if I do nothing

Without the required permissions, you can't advance steps in the assess skills business process

https://doc.workday.com/release-notes/en-us/skills/8729573.html

Validation Message for Send Message Task

What's changing

With this release, Workday adds a validation message on the Send Message task on the Candidate Grid to limit the number of candidates you can email through the task.

What do I need to do

You don't need to do anything. This enhancement is automatically available, and the validation message will only display if the number of candidates you wish to email using the Send Message task exceeds 1,000.

Additional considerations

Workday adds this validation message to the Send Message task on the Candidate Grid on job requisitions and evergreen requisitions: You can't send an email to more than 1000 candidates at once. For larger groups, consider using Candidate Pools.

What happens if I do nothing

You will continue to use the Send Message task as normal. The validation message will only display if you exceed 1,000 candidates.

https://doc.workday.com/release-notes/en-us/hrrec/8619053.html

Career Hub and Opportunity Marketplace: Job Match Analysis

What's changing

Workday updates the job opportunity side panel in Career Hub and Opportunity Marketplace to display the worker's match analysis for suggested jobs.

What do I need to do

No steps need to be taken. This feature is automatically available.

Additional considerations

Workday displays the worker's job match analysis on the suggested jobs side panel.

What happens if I do nothing

No steps need to be taken. This feature is automatically available.

https://doc.workday.com/release-notes/en-us/taladv/8652427.html

Career Hub and Opportunity Marketplace: Onboarding Progress and User Journey

What's changing

Workday updates onboarding and career planning for Career Hub and Opportunity Marketplace. Workday now displays a progress indicator for user profile setup and a bookmark icon to help reframe discovering new opportunities.

Additional considerations

Progress Indicator

Workday displays an onboarding progress indicator for Career Hub and Opportunity Marketplace.

Bookmark Icon

Workday replaces the Save to Plan link with a bookmark icon in Career Hub in these sections:

- Mentorship.
- Connection.
- Learning.
- Flex Teams.
- Job Openings.

https://doc.workday.com/release-notes/en-us/taladv/8635503.html

Career Hub and Opportunity Marketplace: Onboarding Progress and User Journey, continued

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.

https://doc.workday.com/release-notes/en-us/taladv/8635503.html

Automatically available

Printing Employee Reviews for Additional Personas

What’s changing

Workday enables UI layout print access for Guided Experience employee reviews to the following personas from their My Tasks review event:

- Former managers.
- Manager for majority of event.
- Additional managers.
- Additional reviewers.

Additional considerations

With this update, the additional personas with access to an employee event in My Tasks can print or save the UI layout of a review when they click the Print icon.

Note: Workday continues to deliver the Workday-defined print layout for employee reviews to users with access to the Performance tab on the worker profile. Workday generates the employee review printout PDF they click the Print icon or the Create New PDF button.

https://doc.workday.com/release-notes/en-us/hrperf/8634747.html

Printing Employee Reviews for Additional Personas, continued

What do I need to do

No steps need to be taken. This feature is automatically available and displays the Print icon in employee reviews you have access to.

What happens if I do nothing

No steps need to be taken. This feature is automatically available.

https://doc.workday.com/release-notes/en-us/hrperf/8634747.html

Workday Peakon Employee Voice

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Automatically available

US Hosting for New Peakon Tenants

What's changing

- Workday introduces a US data center to our hosting infrastructure, starting from 15th March. New Peakon customers can choose their hosting region (US or EU) during onboarding.
- Note that data and tenant transfer between regions is not supported. US-hosted environments are only available to new customers that don't already have a Peakon tenant.

Additional considerations

- Peakon's US hosting environment utilizes Amazon Web Services (AWS) infrastructure in the US region. The user interface remains the same for all customers, no matter the hosting region.

What do I need to do

- Nothing. Customer Care selects the hosting region upon account creation.

https://doc.workday.com/release-notes/en-us/doc/8741509.html

Japanese Translation Enhancements

What's changing

- Workday is improving Japanese translations in Workday Peakon to enhance survey clarity and user experience.
- These enhancements include, amongst others, changes to translations of:
  - Driver names.
  - Survey questions.

Additional considerations

- These updates will be implemented between March 24th and 28th.

What do I need to do

- Share this information with relevant users in your organization to ensure they are aware of the updates and can address any potential questions, as this change will affect any open survey rounds.
- View the file attached to the Release Note for an overview of key changes.

https://doc.workday.com/release-notes/en-us/doc/8747247.html

Workday VNDLY

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Automatically available

Close a Statement of Work Role with a Change Order

What's changing

With this release to Preview/Test tenants, Workday allows users to close a Statement of Work (SOW) role by creating a change order.

Additional considerations

Previously, users could only cancel roles on Active SOWs if the SOWs didn't have any related work orders. Now, users in Preview/Test tenants can close SOW roles, including roles with related work orders, by creating a change order.

If you create a change order to close an SOW role, any active work orders related to the SOW will remain in the Active status. Any pending work orders related to the SOW (such as work orders in the Applied or Ready to Onboard status) will be closed with a status of Ended by Job Close.

https://doc.workday.com/release-notes/en-us/vndly/8820709.html

Close a Statement of Work Role with a Change Order, continued

What do I need to do

To close an SOW role with a change order:

- From the header, select Statement of Work > Statement of Work.
- Find the SOW. It must have a Payment Type of Time and Materials, or it must have non-billable contractors.
- Click Create Change Order.
- On the SOW, navigate to the Team tab.
- Next to the role name, click Actions and select Close Role.

https://doc.workday.com/release-notes/en-us/vndly/8820709.html

Workforce Management - Absence

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Automatically available

Absence Report Fields for Leave and Time Off

What's changing

With Workday 2025R1, Workday continues to improve how you configure leave and time off absences.

Additional considerations

Workday delivers these new report fields on the Leave Request Event business object that you can use in custom reports and condition rules:

- Days Between Leave Start Date and Today.
- Total Units Requested for Current Leave Including All Leave Types and Time Offs Associated with the Current Leave Type.

The new report fields are secured to these domains:

- Self-Service: Leave of Absence.
- Worker Data Leave of Absence.

https://doc.workday.com/release-notes/en-us/abs/8758676.html

Absence Report Fields for Leave and Time Off, continued

Additional considerations

Workday also delivers new Constant Value Calculations that you can use to configure time off plans, accruals, and time offs:

- 999.
- 10000.
- 224.

The new calculations are Workday Owned.

https://doc.workday.com/release-notes/en-us/abs/8758676.html

Accrual Expiration Override Web Services

What's changing

With this release, Workday delivers two new transactional web services to the Accrual Expiration feature.

What do I need to do

Configure access to the new web services on the Worker Data: Time Off (Adjustments and Override) domain.

Additional considerations

Workday delivers the following web services to the Worker Data: Time Off (Adjustments and Overrides) domain:

- Get Accrual Expiration Override.
- Put Accrual Expiration Override.

What happens if I do nothing

You can continue overriding Accrual Expiration using the Maintain Accrual Expiration Overrides task.

https://doc.workday.com/release-notes/en-us/abs/8352042.html

Workforce Management – Time Tracking

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Midweek Project Changes with Enter Time by Type

What's changing

With this release, workers can enter project time in Enter Time by Type after midweek project or project plan task eligibility changes, or midweek project inactivation.

Additional considerations

Workers no longer receive a validation message for approved and unmodified time entries after a midweek:

- Project inactivation.
- Project eligibility change.
- Project plan task eligibility change.

Note: To avoid critical validation errors, managers and administrators must approve time entries before they:

- *Inactivate the project they're related to.*
- *Change worker eligibility for the project or project plan task.*

https://doc.workday.com/release-notes/en-us/time/8765126.html

Midweek Project Changes with Enter Time by Type, continued

What do I need to do

You don’t need to take action.

What happens if I do nothing

There’s no impact if you do nothing.

https://doc.workday.com/release-notes/en-us/time/8765126.html

Automatically available

Enter Time by Type Comments

What's changing

Workday continues to improve the Enter Time by Type user experience with enhancements to the Comments pop-up.

What do I need to do

The changes to Comments are available automatically. Workday recommends that you update your training materials so that users are aware of the changes to the time entry methods.

Additional considerations

When your users enter time by type, they can now enter comments for each day in a vertically expandable field. We remove the table format for better accessibility.

What happens if I do nothing

Your users will still see a vertically expandable field to enter comments for each day instead of a table.

https://doc.workday.com/release-notes/en-us/time/8735765.html

Time Entry Template Reporting, continued

What's changing

With this release, Workday includes an additional time entry template settings on the All-Time Entry Template Effective Dates report.

Additional considerations

Workday adds these new columns to the All-Time Entry Template Effective Dates report so that you can review all time entry template settings in a single report:

- Copy Worktags for Breaks.
- Enable Optional Out Times.
- Main Totals.
- Total.
- Unit.
- Label.
- Primary.
- Prevent Submission of Incomplete Time Blocks.
- Time Shift Options.

https://doc.workday.com/release-notes/en-us/time/8758781.html

Automatically available

Time Entry Template Reporting, continued

Additional Considerations

- Maximum Duration for Out (Hours).
- Maximum Duration for Out (Minutes).
- Maximum Duration for Meal (Hours).
- Maximum Duration for Meal (Minutes).
- Maximum Duration for Break (Hours).
- Maximum Duration for Break (Minutes).
- Group Time Blocks for Shift Based On.
- Use Second Precision.

https://doc.workday.com/release-notes/en-us/time/8758781.html

Automatically available

Time Entry Template Reporting, continued

What do I need to do

You don’t need to take action.

What happens if I do nothing

The report will be accessible from global search.

https://doc.workday.com/release-notes/en-us/time/8758781.html

Automatically available

Maintain Invalid Time Clock Events for Workers

What's changing

With this release, managers can correct invalid time clock events that workers record on the Workday Time Kiosk during downtime or on third-party clocks.

Additional considerations

Workday delivers a new Maintain Time Clock Events for Worker security domain (in the Time Tracking functional area) that you can use to secure manager access to the time clock events of their workers.

Workday also delivers the new Maintain Invalid Time Clock Events for Workers task (secured to the Maintain Time Clock Events for Worker domain in the Time Tracking functional area). This task enables managers to correct or ignore invalid time clock events for their direct reports.

https://doc.workday.com/release-notes/en-us/time/8656435.html

Maintain Invalid Time Clock Events for Workers, continued

What do I need to do

You must grant users access to these security domains to use the new Maintain Invalid Time Clock Events for Workers task:

- Maintain Time Clock Events for Worker.
- Worker Data: View/Edit Time Clock Events.

To display employee IDs on the Maintain Invalid Time Clock Events for Workers task, select the Show Reference ID and Employee ID check box when you access the task.

What happens if I do nothing

There is no impact if you do nothing.

https://doc.workday.com/release-notes/en-us/time/8656435.html

Automatically Submit Time Enhancements

What's changing

Workday enhances the Auto Submit Time feature to help you easily select a population to automatically submit time and to choose which periods to exclude.

Additional considerations

Workday adds these fields to the Selection Criteria tab to support flexible selection of workers to automatically submit time:

- Organizations.
- Include Subordinate Organizations .
- Job Profiles.
- Worker Type.
- Locations.
- Collective Agreement.
- Work Shifts.
- On Leave Include.
- Exclude.
- On Leave Workers Only.

https://doc.workday.com/release-notes/en-us/time/8435136.html

Automatically Submit Time Enhancements, continued

Additional considerations

Workers Selection section - You can only select workers you have access to from this prompt.

- Exclude Current and Future Periods check box- To exclude a worker's current and future periods from being submitted automatically.

Reported Time Blocks for a Date Range Report

Workday adds the Worker Status column to the Reported Time Blocks for a Date Range report to help you automatically submit time for workers based on their employment status.

https://doc.workday.com/release-notes/en-us/time/8435136.html

Automatically Submit Time Enhancements, continued

Additional considerations

Auto Submit Time Fields

Workday renames these fields on the Auto Submit Time task for clarity:

- Auto Submit to Auto Submit Periods With.
- All Time to Any Unsubmitted Time.
- Imported Time to Any Imported Time.
- Imported Auto Submit Time to Imported Time With Auto Submit Value True.

Workday also updates the description of Dynamic Range to correctly explain the Run Now frequency.

https://doc.workday.com/release-notes/en-us/time/8435136.html

Automatically Submit Time Enhancements, continued

What do I need to do

Review your existing Auto Submit Time schedules to identify and update any schedules.

What happens if I do nothing

Workday still displays the new fields and check boxes that are added to help you easily select a population to automatically submit time.

https://doc.workday.com/release-notes/en-us/time/8435136.html

Automatically available

Edit and Approve Time Filters

What's changing

With this release, Workday adds new filters that enable you to better control which workers to display on the Edit and Approve Time report.

Additional considerations

When you set up filters on the Edit Time Approval Template task, they now apply to the Edit and Approve Time report. This enables you to:

- Add these prompts that reviewers can use to refine the groups of workers to display on the report: Employee Type -
  - Job Exempt Status.
  - Pay Rate Type.
  - Worker Type.
- Configure implicit filters that reviewers can't modify.

https://doc.workday.com/release-notes/en-us/time/8485287.html

Automatically available

Edit and Approve Time Filters, continued

What do I need to do

If you don't yet have filters configured, use the Edit Time Approval Template task to configure them on the time approval templates you're using with these reports:

- Edit and Approve Time.
- Review Time.

What happens if I do nothing

If you already have worker filters configured in the Review Time report, these will now also automatically apply to the Edit and Approve Time report.

https://doc.workday.com/release-notes/en-us/time/8485287.html

Effective-Dated Time Entry Templates

What's changing

With this release, you can apply effective dates to time entry templates to support changes in legislation, union agreements, or company policy, ensuring accurate time entries for workers.

You can also view current, past, and future effective-dated configurations to easily track changes over time.

This feature enables Time Tracking administrators to create effective-dated time entry template configurations for key Time Tracking elements that impact time calculations, totals, and time entry recording.

Additional considerations

Time Entry Template Changes

To support saving time entry template data with effective dates, we update these tasks and reports:

- Create Time Entry Template.
- Edit Time Entry Template.
- View Time Entry Template.

Workday consolidates the time entry template tabs into these 2 new tabs:

- Effective-Dated: Contains fields and configuration options that are effective-dated and apply to all time entry methods.

https://doc.workday.com/release-notes/en-us/time/7068921.html

Effective-Dated Time Entry Templates, continued

Additional considerations

- Noneffective-Dated: Contains fields and configuration options that are not effective-dated and apply to transactions in the past, present, and future.

Fields in the header of the time entry template are not effective-dated.

The Effective-Dated tab contains:

- A new Effective Date field.
- A panel on the left where you can:
  - Choose effective dates that have data already configured.
  - Add new effective dates.
  - The Default Time Entry Code option.

https://doc.workday.com/release-notes/en-us/time/7068921.html

Effective-Dated Time Entry Templates, continued

Additional considerations

- These sections and their configuration options:
  - Time Clock Event Matching.
  - Time Off Calculations.
  - Shift-Based Check-In.
  - System Meals and Breaks.
  - Time Entry Restrictions.
  - Worktags.
  - Business Process.
  - Time Shift.
  - Totals.
  - Eligibility.

https://doc.workday.com/release-notes/en-us/time/7068921.html

Effective-Dated Time Entry Templates, continued

Additional considerations

Workday also adds a new Copy Effective-Dated Data button on the View Time Entry Template report that lets you copy effective-dated time entry template configurations.

Time Entry Template Eligibility

With this change, eligibility comes from the end of the week or from the specific day depending on the time entry method or task. See the Attachments for details.

https://doc.workday.com/release-notes/en-us/time/7068921.html

Effective-Dated Time Entry Templates, continued

Additional considerations

Time Tracking Tasks

Workday delivers a new Delete Time Entry Template Effective-Dated Data task (secured to the Set Up: Time Tracking domain in the Time Tracking and Time Tracking Hub functional areas) that you can use to delete data for multiple effective dates for a time entry template.

Workday also adds a new Copy Time Entry Template task that you can access through the related actions menu of a time entry template. This enables you to create a new time entry template with a similar effective-dating and noneffective-dating configuration.

https://doc.workday.com/release-notes/en-us/time/7068921.html

Effective-Dated Time Entry Templates, continued

Additional considerations

Financial Management Tasks

Workday updates these Financial Management tasks to respect and support effective-dated data from Time Tracking:

- Review Billable Project Transactions.
- Set Up Project Labor Cost Summary Configuration.
- Review Billable Usage-Based Transactions Reports.

Workday delivers a new All Time Entry Template Effective Dates report (secured to the Set Up: Time Tracking domain in the Time Tracking and Time Tracking Hub functional areas) so that you can view all effective-dated configurations for all time entry templates in a single report.

https://doc.workday.com/release-notes/en-us/time/7068921.html

Effective-Dated Time Entry Templates, continued

Additional considerations

Workday updates the All-Time Entry Templates report with a new:

- Effective Date prompt. When you don’t select a date, Workday uses the current date.
- Effective as of Date field that we display only when you select an effective date.

Workday updates the View Time Tracking Eligibility Rule report so that Workday appends the effective date to the eligibility rule name.

Workday also updates the Used By field on the All-Translation Condition Rules report to return the effective-dated time entry template that the condition rule is used in.

https://doc.workday.com/release-notes/en-us/time/7068921.html

Effective-Dated Time Entry Templates, continued

Additional considerations

New and Updated Report Fields

Workday updates the Used By report field to support effective dating and return the appropriate value based on the effective date on the Condition Rule business object. Used By now returns time entry templates with the effective date appended to the existing report field name.

Workday adds many new report fields and update many existing report fields that you can use in custom reports. See Attachments for a full list.

Web Services

Workday also updates many existing web services. See Attachments for a full list.

https://doc.workday.com/release-notes/en-us/time/7068921.html

Automatically available

Effective-Dated Time Entry Templates, continued

Additional considerations

Other Updates

Workday also updates many existing Time Tracking business processes, jobs, tasks, reports, report data sources, and worklets to respect and support effective dating. See Attachments for a full list.

https://doc.workday.com/release-notes/en-us/time/7068921.html

Effective-Dated Time Entry Templates, continued

What do I need to do

You don't need to take action to enable this feature.

What happens if I do nothing

Workday automatically delivers a conversion of your tenant's time entry templates. We add 1 effective-dated configuration to all time entry templates with an effective start date of 1930-01-01. You'll be able to change this date and any of the available configurations on the templates.

All Time Tracking business objects, report fields, and reports that are impacted by this change will automatically be available. You can view the impacted objects in their corresponding tasks and usage areas.

Going forward, Workday will include effective dates on all configuration changes to time entry templates.

https://doc.workday.com/release-notes/en-us/time/7068921.html

Effective-Dated Time Entry Templates, continued

What happens if I do nothing

For iLoad templates version 44 and later, you'll see new columns to support effective dating. For iLoad and web services, you can continue to use older versions.

When performing a Put transaction with an older version for an existing time entry template, the Put will update all noneffective-dated fields, the current effective-dated fields, and all future effective-dated fields.

When performing a Put with an older version for a time entry template that doesn’t already exist, the Put creates the time entry template with an effective date of 1930-01-01.

https://doc.workday.com/release-notes/en-us/time/7068921.html

Effective-Dated Time Entry Templates, continued

What happens if I do nothing

Migration

You can’t migrate effective-dated time entry templates from:

- Preview tenants to Production tenants.
- Version 44 tenants to version 43 tenants.

If you try to migrate during the Preview window, the OX2.0 web service reverts to version 43 and doesn't support effective dating.

https://doc.workday.com/release-notes/en-us/time/7068921.html

Retiring features

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Live Reports as Announcements

Retiring 2025-03-15

What's changing

Workday plans to retire enabling you to include live reports as announcements. The functionality is no longer needed.

- You can continue to create static HTML and text files as announcements. Alternately, you can use:
  - Web report links on dashboards.
  - Process tracker and process guide.

Additional considerations

You can continue to create static HTML and text files as announcements. Alternately, you can use:

- Web report links on dashboards.
- Process tracker and process guide.

What do I need to do

Workday recommends that you use web links on dashboards.

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

Sage Intacct Connector for Adaptive Planning

Retiring 2025-03-14

What's changing

Workday previously planned to retire the Sage Intacct Connector in Workday Adaptive Planning due to a change in Intacct's Marketplace Partner Program.

However, Workday now plans to support this functionality if you onboarded to Workday Adaptive Planning before 2025-03-14.

What do I need to do

If you onboarded to Workday Adaptive Planning before 2025-03-14, Workday plans to support the integration as long as Sage continues to support the Workday Adaptive Planning sender ID.

The integration won't be available if you onboarded to Workday Adaptive Planning on or after 2025-03-14.

What happens if I do nothing

If you currently use the connector and choose to do nothing, there is no impact to your integration with Intacct.

Note: Workday's current and future support of the Sage Intacct connector is subject to the public availability and maintenance of the existing pre-built Sage Intacct APIs. Use of this connector is optional and not a part of the Workday Service.

https://doc.workday.com/release-notes/en-us/plnint/7564986.html

Retiring

Planning REST API Version 15 and Earlier

Retiring 2025-03-15

What's changing

Workday is now retiring the Planning Rest APIs, version 15 and earlier.

Additional considerations

Workday replaces the retiring item with Adaptive Planning REST APIs.

What do I need to do

Workday recommends that you use the new APIs

https://doc.workday.com/release-notes/en-us/plnmod/6289617.html

APIs

Retiring 2025-03-15

What's changing

Workday now plans to retire these APIs:

- Accounts.
- Dimensions.
- Levels.

Additional considerations

Workday replaces the retiring items with Adaptive Planning REST APIs.

What do I need to do

Workday is replacing the retiring items with Adaptive Planning REST APIs.

https://doc.workday.com/release-notes/en-us/plnmod/6034003.html

Safety Incident Event (Do Not Use)

Retiring 2025-03-15

What’s changing

Workday plans to retire the Safety Incident Event (Do Not Use) report field on the Safety Incident Event business object.

Additional considerations

Workday plans to replace it with the Safety Incident Event report field on the Action Event business object.

What do I need to do

May impact your training materials. Workday recommends that you begin using the new report field on custom reports.

https://doc.workday.com/release-notes/en-us/hrcomply/1826175.html

Currency Conversion Rates (Index Disabled) (Do Not Use)

Retiring 2025-03-15

What's changing

Workday plans to retire the Currency Conversion Rates (Index Disabled) (Do Not Use) report data source (RDS).

Additional considerations

Workday replaces the retiring item with the:

- Indexed Data Source - Currency Conversion Rates report data source.
- Valid Currency Conversion Rates data source filter.

What do I need to do

Workday recommends that you stop using the non-indexed RDS and start using the indexed RDS.

https://doc.workday.com/release-notes/en-us/fincore/8539302.html

Create Customer Task

Retiring 2025-09-06

What's Changing

Workday now plans to retire the Create Customer task.

Additional considerations

Workday replaces the retiring item with the Create Customer task.

What do I need to do?

Workday recommends updating any impacted training materials.

https://doc.workday.com/release-notes/en-us/fincust/1069813.html

My Team's work

Retiring 2025-03-15

What's Changing

Workday plans to retire the My Team's Work worklet.

What do I need to do?

Workday recommends that you start using the Project Manager Hub.

Additional considerations

Workday replaces the retiring worklet with the Project Manager Hub.

https://doc.workday.com/release-notes/en-us/finprj/8273328.html

My Projects and Project Tasks Report

Retiring 2025-03-22

What's Changing

Workday plans to retire these reports:

- My Projects.
- Project Tasks.

Additional Considerations

Workday replaces this functionality with the Project Manager Hub.

What do I need to do?

This may impact your training materials.

Workday recommends using the Project Manager Hub.

https://doc.workday.com/release-notes/en-us/finprj/7502207.html

Questionnaire Answers (Do Not Use)

Retiring 2025-03-15

What's changing

Workday retires the Questionnaire Answers (Do Not Use) report field on the Job Applications, Prospects and Referrals business object.

Additional considerations

Workday replaces the retiring item with the Questionnaire Answers from Initial Application report field on the Job Applications, Prospects and Referrals business object.

What do I need to do?

May impact your training materials.

Workday recommends that you replace the old report field on any custom reports and start using the new report field.

https://doc.workday.com/release-notes/en-us/hrrec/1728673.html

Get Ready for the Enhanced Change Job Experience with 2025R2

Retiring 2025-09-13

What's changing

As of the 2024R2 release, the enhanced Change Job experience not only matches the capabilities of the legacy Change Job experience, but significantly extends job change capabilities.

Workday's Change Job solution delivers a seamless and user-friendly experience, streamlining the entire process from start to finish. By simplifying tasks, improving discoverability, and ensuring data accuracy, Workday empowers both users and administrators to navigate job changes confidently and efficiently. This enhanced user interface has proven to both reduce time to transact and increase completion rates.

Additional considerations

In preparation for the future retirement, Workday appends (Do Not Use) to the Change Job business process type when you configure help text for the business process type on the View Business Process Document View Template report.

Workday recommend that you configure Quick Tips and Help Text on the steps of the Change Job business process.

https://doc.workday.com/release-notes/en-us/hrcore/7872620.html

Get Ready for the Enhanced Change Job Experience with 2025R2, continued

Retiring 2025-09-13

What do I need to do?

Depending on where you are in your Change Job journey, you will need to:

Create or update templates that you opt into the new user experience.

Review current security configurations and ensure functionality meets your needs through the:

- Configure Optional Fields task.
- Maintain Localization Settings task.
- Change Job business process security policy.

Review and implement additional optimization capabilities that are available with the new experience.

Create a change management, communication, and training plan.

.

What happens if I do nothing

For customers who have not adopted Change Job Templates, Workday will:

- Automatically migrate your current Change Job business process into a single Change Job template that is configured with the new user experience.
- Automatically convert certain domain security configurations.
- Require additional review by your Administrator to ensure capabilities meet current security requirements.

Note: For more information on the impacts to security changes, see this Next Level session: Preparing for the New Change Job User Interface

https://doc.workday.com/release-notes/en-us/hrcore/7872620.html

Retiring

Current Form I-9 (Do Not Use)

Retiring 2025-03-15

What's changing

Workday plans to retire the Current Form I-9 (Do Not Use) report field on the Worker business object.

Additional Considerations

Workday plans to replace it with the most recent Form I-9 report field on the Worker business object

What do I need to do

This may impact your training materials. Workday recommends that you update your custom reports to use the new report field.

https://doc.workday.com/release-notes/en-us/hrcomply/1880037.html

Complete Form I-9 Document Reverification

Retiring 2025-03-15

What's changing

Workday plans to retire the Complete Form I-9 Document Reverification task on the Complete Form I-9 business process.

Additional Considerations

Workday plans to replace the retiring item with the Manage Form I-9 Assignment for Worker task.

What do I need to do

May impact your training materials. Workday recommends that you configure and start using the new task.

https://doc.workday.com/release-notes/en-us/hrcomply/286133.html

Primary and Additional Nationality Fields on Various Business Objects

Retiring 2025-03-15

What's changing

Workday now plans to retire Primary and additional nationality report fields on these business objects:

- Dependent.
- Dependent Event.
- Job Applications, Prospects and Referrals.
- Personal Information Change Event.
- Personal Information Change Event.
- Pre-Hire.
- Worker.
- Worker Business Process.

Additional considerations

Workday now replaces the retiring item with the new report fields for primary and additional nationalities on these business objects:

- Dependent.
- Dependent Event.
- Job Applications, Prospects and Referrals.
- Personal Information Change Event.
- Personal Information Change Event.
- Pre-Hire.
- Worker.
- Worker Business Process.

https://doc.workday.com/release-notes/en-us/hrpersoninf/6676278.html

Primary and Additional Nationality Fields on Various Business Objects, continued

Retiring 2025-03-15

What do I need to do?

May impact your training materials. Workday recommends you replace the report fields with the new report fields in your reporting and calculated fields.

https://doc.workday.com/release-notes/en-us/hrpersoninf/6676278.html

Mass Print Form I-9 for Active Workers (Do Not Use)

Retiring 2025-03-15

What's changing

Workday plans to retire the Mass Print Form I-9 for Active Workers (Do Not Use) report.

Additional considerations

Workday plans to replace it with the Mass Print Form I-9 for Workers report.

What do I need to do?

May impact your training materials. Workday recommends that you begin using the new report and update any custom reports based on the old report.

https://doc.workday.com/release-notes/en-us/hrcomply/1826176.html

Period Activity Assignments - Current Academic Period (Do Not Use)

Retiring 2025-03-15

What's changing

Workday plans to retire the Period Activity Assignments - Current Academic Period (Do Not Use) report field with the new Period Activity Assignments - Current Academic Periods report field on the Position business object.

The new report field returns all assignments for a position when you configure Academic Periods that overlap.

Additional considerations

Workday replaces the retiring item with the new Period Activity Assignments - Current Academic Periods report field on the Position business object.

What do I need to do?

Workday recommends that you replace the old report field with the new report field.

https://doc.workday.com/release-notes/en-us/hrcomp/5677487.html

Management Level (Compensation) Report Field

Retiring 2025-03-15

What's changing

Workday now plans to retire the Management Level (Compensation) report field on the Compensation Rule Targetable business object.

Additional considerations

Workday replaces the retiring item with these report fields on the Compensation Rule Targetable business object:

- Job Profile - Primary (Compensation)
- Management Level (Compensation)

What do I need to do?

May impact your training materials.

You need to replace the old report fields with the new ones on eligibility rules and custom reports.

https://doc.workday.com/release-notes/en-us/hrcomp/2625821.html

Create Statutory Compensation Statements Task/Process

Retiring 2025-03-15

What's changing

Workday plans to retire Create Statutory Compensation Statements task and business process.

Additional considerations

Workday now replaces the retiring item with Wage Theft Prevention Notice Ad Hoc business process.

What do I need to do?

May impact your training materials and require additional testing.

Workday will enhance the Wage Theft Prevention Notice business process so it can be initiated in an ad hoc capacity, not only used as a subprocess.

https://doc.workday.com/release-notes/en-us/hrcomp/1814498.html

Hourly Overtime Rate Report Field

Retiring 2025-03-15

What's changing

Workday plans to retire the Hourly Overtime Rate report field on the Wage Theft Notice Event Interface business object.

Additional considerations

Workday replaces the retiring item with the Hourly Overtime Rate - Proposed report field on the Wage Theft Notice Event Interface business object.

What do I need to do?

This may impact your training materials.

Workday recommends that you replace the retiring field with the new field on custom reports and condition rules.

https://doc.workday.com/release-notes/en-us/hrcomp/5010688.html

One-Time Payment Plans Field on Payment Plan Object

Retiring 2025-03-15

What’s changing

Workday plans to retire One-Time Payment Plans report field on the Payment Plan business object.

Additional considerations

Workday replaces the retiring item with One-Time Payment Plans report field on the One-Time Payment Event business object.

What do I need to do?

This may impact your training materials.

Workday recommends that you replace the old report field and begin using the new report field on custom reports.

https://doc.workday.com/release-notes/en-us/hrcomp/1805043.html

Amount for One-Time Payment Plan Report Fields

Retiring 2025-03-15

What's changing

Workday plans to retire these report fields on the One-Time Payment Event business object:

- Maximum Amount for One-Time Payment Plan (Do Not Use).
- Minimum Amount for One-Time Payment Plan (Do Not Use).

Additional considerations

Workday replaces the retiring items with these report fields on the One-Time Payment Event business object:

- Maximum Amount for One-Time Payment Plan.
- Minimum Amount for One-Time Payment Plan.

What do I need to do?

May impact your training materials.

Workday recommends that you replace the retiring fields with the new fields on custom reports.

https://doc.workday.com/release-notes/en-us/hrcomp/5000077.html

Action Event Business Object Report Fields

Retiring 2025-03-15

What’s changing

Workday plans to retire these report fields on the Action Event business object:

- Employee Compensation Business Process (Do Not Use).
- Stock Grant Business Process (Do Not Use).

Additional considerations

Workday replaces the retiring item with these report fields on the Action Event business object:

- Employee Compensation Business Process
- Employee Compensation Event for Current Event
- Stock Grant Business Process

https://doc.workday.com/release-notes/en-us/hrcomp/2979968.html

One-Time Payment Business Process (Do Not Use) - Action Event Report

Retiring 2025-03-15

What's changing

Workday now plans to retire One-Time Payment Business Process (Do Not Use) report field on the Action Event business object.

Additional considerations

Workday now replaces the retiring item with One-Time Payment Business Process report field on the Action Event business object.

What do I need to do?

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

https://doc.workday.com/release-notes/en-us/hrcomp/2977189.html

XSLT for Payslips

Retiring 2025-03-15

What's Changing

Workday plans to retire the Extensible Stylesheet Language Transformation (XSLT) for Payslips.

Additional Considerations

Workday plans to:

- Replace it with BIRT Report Designer, and
- Remove the Print Payslips Using Report Designer

Layout check box from the Edit Tenant Setup - Payroll task.

What do I need to do?

To enable BIRT for Payslips:

- Select the Print Payslips Using Report Designer Layout check box on the Payslips section of the Edit Tenant Setup - Payroll task.
- Select a default business form layout that you want to use.
- To test, print a worker's payslip in PDF format.

https://doc.workday.com/release-notes/en-us/paywdpymt/8646754.html

Challenge Questions

Retiring 2025-03-15

What's Changing

Workday plans to retire challenge questions as a primary authentication factor.

Workday also plans to retire these tasks and report:

- Maintain Tenant Challenge Questions (Do Not Use) task
- Manage Password Challenge Questions (Do Not Use) task
- System User Remove Challenge Questions (Do Not Use) task
- Tenant Challenge Questions (Do Not Use) report

Additional considerations

Workday plans to replace the retiring items with other supported authentication factors, such as:

- Multi-factor Authentication
- Passwordless Authentication

https://doc.workday.com/release-notes/en-us/authn/5754241.html

Challenge Questions, continued

Retiring 2025-03-15

What's Changing

Workday also plans to retire these fields:

- Reset Challenge Questions (Do Not Use) on the Edit Workday Account and Manage Workday Account Credentials tasks.
- User - Name Password + Challenge Questions (Do Not Use) on authentication policies.

https://doc.workday.com/release-notes/en-us/authn/5754241.html

Challenge Questions, continued

Retiring 2025-03-15

What do I need to do

Workday recommends you start using multi-factor or passwordless authentication.

https://doc.workday.com/release-notes/en-us/authn/5754241.html

Favorites Worklet

Retiring 2025-03-15

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.

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

Delegated Authentication Functionality

Retiring 2025-03-15

What's Changing

Workday plans to retire the Delegated Authentication functionality and the:

- Default Delegated Authentication System (Do Not Use) and Delegated Authentication Timeout (Do Not Use) fields in the Single Sign-on section on the Edit Tenant Setup – Security task.
- Exempt from Delegated Authentication (Do Not Use) check box and Override Delegated Authentication Integration System (Do Not Use) field in the Delegated Authentication Options section on the Edit Workday Account task.
- Delegated Authentication Options (Do Not Use) section on the Edit Workday Account task.

Additional Considerations

Workday replaces the retiring item with the Security Assertion Markup Language (SAML) authentication.

https://doc.workday.com/release-notes/en-us/authn/5602943.html

People Experience Search

Retiring 2025-03-15

What's changing

Workday now plans to retire Search results page prior to the People Experience Search feature being on by default.

Additional considerations

Workday replaces the retiring item with People Experience Search.

What do I need to do

No action required, the People Experience Search default will be Automatically Available with 2022R1.

For more information, see: People Experience Home Page.

https://doc.workday.com/release-notes/en-us/pex/4921169.html

Migrate Solutions Task

Retiring 2025-03-15

What's Changing

Workday plans to retire the Migrate Solutions task.

Additional Considerations

Workday replaces the task with Object Transporter and Customer Central instead.

Workday renames the Migrate Solutions task to Migrate Solution (Soon to be deprecated) to indicate that we plan to retire it in a future service update.

Workday also now displays this warning when you run the task: Workday recommends that you DO NOT USE the Migrate solution feature as it will soon be deprecated. For more information: https://doc.workday.com/admin-guide/en-us/manage-workday/tenant-configuration/solutions/dan1370796663851.html

https://doc.workday.com/release-notes/en-us/icp/8284846.html

Migrate Solutions Task, continued

Retiring 2025-03-15

What happens if I do nothing

Workday recommends you use Object Transporter and Customer Central instead of the task to perform migrations.

https://doc.workday.com/release-notes/en-us/icp/8284846.html

Business Object and Tenant Instance Report

Retiring 2025-03-15

What's changing

Workday now plans to retire this task and report:

- Business Object Translations (DO NOT USE) report.
- Translate Tenant Instance (DO NOT USE) task that you access from the Translations related action.

Additional considerations

Workday replaces the retiring item with these reports:

- Translate Business Object report.
- Translate Tenant Instance report that you can access from the Translations related action.

What do I need to do

May impact your training materials and require additional testing. Use the new reports and tag them as favorites.

Workday appends (DO NOT USE) to the retiring report and task, simplifying how you identify which to use.

https://doc.workday.com/release-notes/en-us/gblfram/5207726.html

Purchase Order Line Date Report Field

Retiring 2025-03-15

What’s changing

Workday now plans to retire the Purchase Order Line Date report field on the Purchase Order Line business object.

What do I need to do

May impact your training materials. Workday recommends that you use the new report field instead and update any custom reports referencing the old report field before the retirement date.

Additional considerations

Workday replaces the retiring item with the Document Date report field on the Common Financial Line Dimensions business object.

What happens if I do nothing

You can no longer select the retiring report field when you create new reports. For your custom reports that use the retiring report field, we return Purchase Order Line Date (Do Not Use) as the report field name. After the retirement date, Workday no longer returns any data for the report field.

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

View Student Payment Elections

Retiring 2025-03-15

What's changing

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

Additional considerations

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

What do I need to do

May impact your training materials.

Workday recommends that you update materials that reference the View Student Payment Elections task and Student Payment Election report with the existing Maintain Payment Elections task and Payment Elections report.

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

Student Engagement REST API

Retiring 2025-08-156

What's changing

Workday plans to retire the Students Hold APIs in the Student Engagement v1 REST API.

Additional considerations

Workday replaces the retiring item with the Holds API in the Student Core v1 REST API.

Workday marks the Student Holds APIs in the Student Engagement v1 REST service as DEPRECATED.

What do I need to do

Replace calls to the Students Holds resource endpoints with the Holds endpoints in the Student Core v1 REST service.

https://doc.workday.com/release-notes/en-us/stucore/7615369.html

The Year Indicator Report Field

Retiring 2025-05-02

What's changing

Workday now plans to retire The Year Indicator (Do Not Use) report field on the ISIR Transaction business object.

What do I need to do

May impact your training materials.

Workday recommends that you replace the old report field on custom reports and start using the new report field.

Additional considerations

Workday replaces the retiring item with The Financial Aid Award Year report field on the ISIR Transaction business object.

https://doc.workday.com/release-notes/en-us/stufad/7258181.html

Student Application Evaluation Event Business Process

Retiring 2025-03-15

What's changing

Workday now plans to retire the Student Application Evaluation Event business process.

Additional considerations

Workday replaces the retiring item with these Admissions Evaluation Event business process views:

- Create Evaluation
- Edit Evaluation

What do I need to do

Workday recommends that you start using the new tasks and business processes.

https://doc.workday.com/release-notes/en-us/stups/7024058.html

Current Academic Load

Retiring 2025-03-15

What's changing

Workday now plans to retire the Current Academic Load (Do Not Use) report field in the Financial Aid Package business object.

Additional considerations

Workday replaces the retiring item with the Student Load Status Used in Financial Aid Processing report field in the Data Used by Financial Aid Processes business object.

https://doc.workday.com/release-notes/en-us/stufad/5470749.html

Dropped All Title IV Eligible Enrollments or Received Withdrawn or Administrative Failure Grades (Do Not Use)

Retiring 2025-03-15

What’s changing

Workday plans to retire the Dropped All Title IV Eligible Enrollments or Received Withdrawn or Administrative Failure Grades (Do Not Use) report field on the Financial Aid Period Record business object.

Additional considerations

Workday plans to replace it with the Dropped, Failed, or Withdrawn from All Title IV Eligible Enrollments report field on the Return of Title IV Worksheet business object.

What do I need to do

May impact your training materials and require additional testing.

Workday recommends you update your custom reports to use the new report field instead of the retiring report field.

https://doc.workday.com/release-notes/en-us/stufad/8251293.html

EFC Replacement Report Field

Retiring 2025-03-15

What's changing

Workday now plans to retire the EFC Replacement (Do Not Use) report field on the Need Packaging Strategy Line business object.

Additional considerations

Workday replaces the retiring item with the Need Method report field on the Award Item business object.

https://doc.workday.com/release-notes/en-us/stufad/5316299.html

Academic Period Record Report Field

Retiring 2025-03-15

What's changing

Workday now plans to retire these report fields on the Academic Period Record business object:

- Posted Additional Period Honors/Standing (Do Not Use).
- Overridden Additional Period Honors/Standing (Do Not Use).
- Additional Period Honors/Standing (Do Not Use).
- Posted Academic Standing (Do Not Use).

Additional considerations

We replace the retiring items with these report fields on the Academic Period Record business object:

- Posted Additional Period Honors/Standing.
- Overridden Additional Period Honors/Standing.
- Additional Period Honors/Standing.
- Posted Academic Standing.

What do I need to do

May impact your training materials.

Workday recommends that you replace the old report fields on any custom reports and start using the new report fields.

https://doc.workday.com/release-notes/en-us/sturec/6950474.html

Academic and Financial Aid Period Record Report Fields

Retiring 2025-03-15

What’s changing

Workday plans to retire these report fields on the:

- Academic Period Record business object:
  - Academic Standing (Do Not Use).
  - Calculated Academic Standing (Do Not Use).
- Financial Aid Period Record business object:
  - Overridden Calculated Academic Standing (Do Not Use).
  - Student Academic Standing (Do Not Use).

Additional considerations

Workday replaces the retiring items with the:

- Calculated Academic Standing report field on the Academic Period Record business object.
- Overridden Academic Standing report field on the Academic Period Record business object.
- Student Academic Standing on the Financial Aid Period Record business object.

https://doc.workday.com/release-notes/en-us/sturec/6306638.html

Academic and Financial Aid Period Record Report Fields, continued

Retiring 2025-03-15

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.

https://doc.workday.com/release-notes/en-us/sturec/6306638.html

The Grade Date Report Field

Retiring 2025-03-15

What’s changing

Workday now plans to retire The Grade Date (Do Not Use) report field on the Student Registration business object.

Additional considerations

Workday replaces the retiring item with The Grade Date report field on the Student business object.

What do I need to do

May impact your training materials.

Workday recommends that you replace the old report field on any custom reports and start using the new report field.

https://doc.workday.com/release-notes/en-us/sturec/6950479.html

Import Student Sponsor Contracts

Retiring 2025-03-15

What's Changing

Workday plans to retire the Import Student Sponsor Contracts (Deprecated) web service.

Additional Considerations

Workday plans to replace it with the Import Student Sponsor Contracts web service.

What do I need to do

Start using the new web service and the new Get Student Sponsor Invoices web service to get invoice reference ID's for the import web service.

https://doc.workday.com/release-notes/en-us/stufin/5468687.html

Assign Charges Job

Retiring 2025-03-15

What’s changing

Workday now plans to retire these jobs:

- Assign Charges Job (Deprecated).
- Defer New Assign Charges Job.

Additional considerations

Workday replaces the retiring items with Assign Charges Job.

https://doc.workday.com/release-notes/en-us/stufin/4792172.html

My Application and My Job Applications Reports

Retiring 2025-03-15

What's changing

Workday now plans to retire the 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.

https://doc.workday.com/release-notes/en-us/hrrec/5710991.html

Learning Engagement Record Report Fields

Retiring 2025-05-08

What's changing

Workday plans to retire many report fields on the Learning Engagement Record business object.

Additional considerations

Workday replaces the retiring items with report fields on the Learning Assignments business object.

What do I need to do

May impact your training materials.

https://doc.workday.com/release-notes/en-us/lrn/5494863.html

Service Operations in Anytime Feedback REST API

Retiring 2025-03-15

What's Changing

Workday now plans to retire these service operations in the Give Feedback REST API versions 1, 2, and 3:

- performanceEnablement/workers/anytimeFeedbackEntries/create.
- performanceEnablement/workers/anytimeFeedbackEvents/view.

Additional Considerations

Workday replaces the retiring item with these service operations in the Give Feedback REST API version 4

- PerformanceEnablement/workers/anytimeFeedbackEvents/create.
- performanceEnablement/workers/anytimeFeedbackEvents/view.

What do I need to do

Workday recommends that you use the new endpoint in preparation for the retirement of its previous versions.

Workday also delivers a new subresource to support the new version of the Give Feedback REST API.

https://doc.workday.com/release-notes/en-us/talpip/5313355.html

Additional release support services

Take advantage of one of our **Release Plus** packages

Option 1	Option 2	Option 3	Add On
Pre-release consulting support	Pre-/Post release audits, feature review, consulting support	Full Support	Regression Testing
Recommended for Clients that are self-sufficient in Workday and have the time to complete release management audits and resolve messages themselves, with guidance from Cognizant	Recommended for clients that need assistance resolving issues and may not have time or resources to conduct all audits	Recommended for clients that need assistance running audits and resolving issues and/or may not have time or resources to conduct audits and resolve messages	Recommended for clients that need assistance with testing entire modules and/or may not have the time or resources do this themselves

Contact your Service Delivery Lead (EM, SDM, PA) for more details on each package, or submit a Salesforce Service Cloud case (indicating the specific Release Plus Package option in the title and description) no later than February 3rd.

Thank you

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