Top features manual

Workday 2025R1

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This presentation includes statements that may constitute forward-looking statements made pursuant to the safe harbor provisions of the Private Securities Litigation Reform Act of 1995, the accuracy of which are necessarily subject to risks, uncertainties and assumptions as to future events that may not prove to be accurate. These statements include, but are not limited to, express or implied forward-looking statements relating to Workday. These statements are neither promises nor guarantees but are informational and remain subject to a variety of risks and uncertainties, many of which are beyond our control, which could cause actual results to differ materially from those contemplated in these forward-looking statements. Existing and prospective investors are cautioned not to place undue reliance on these forward-looking statements, which speak only as of the date hereof. Factors that could cause outcomes to differ materially from those expressed or implied include general economic conditions, the impact of technological development and competition, the competitive and rapidly changing nature of the markets we compete in, the competitive marketplace for talent and its impact on employee recruitment and retention, and the other factors discussed in our most recent Annual Report on Form 10-K and other filings with the Securities and Exchange Commission. Cognizant undertakes no obligation to update or revise any forward-looking statements, whether as a result of new information, future events, or otherwise, except as may be required under applicable securities law.

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	Top features manual	Impact analysis 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**	• 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**	• 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**

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

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.

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- Forecast Explanations for Predictive Forecaster

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

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

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

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

Automatically available

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

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

Forecast Explanations for Predictive Forecaster

What's changing

Workday adds a new feature, Forecast Explanation, to Machine Learning Predictive Forecaster. After your forecast runs with the feature enabled, Workday provides a chart and explanatory text enabling you to review and understand the factors that contributed to the forecasted data.

What do I need to do

To enable the feature for existing forecasts:

From the main menu, select Modeling.

- Select Predictive Forecaster.
- Hover over the forecasts in the list to access the More Actions menu.
- Click the 3 dots that display and select Edit.
- In the Forecast section, select Forecast Explanation.
- Select Run or Save to run it later.

To review the forecast explanations:

- After the forecast runs successfully, select Modeling from the main menu.

https://doc.workday.com/release-notes/en-us/plnmod/8725000.html

Forecast Explanations for Predictive Forecaster, continued

What do I need to do

Hover over the forecasts in the list to access the More Actions menu.

Click the 3 dots that display and select View History.

Select the Confidence Metrics tab.

https://doc.workday.com/release-notes/en-us/plnmod/8725000.html

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

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

Analytics and Reporting

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Analytics and Reporting top features

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- Google BigQuery Connections for Data Change Tasks
- Join Stage Join Types
- Worksheets Saved and Shared Private Filters

Setup required

- Analytic Dimensions for Prism Analytics

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

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

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

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

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

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

Setup required

Analytic Dimensions for Prism Analytics

What's changing

You can bring in external dimensional data and store it in Prism Analytics as user-defined instance data.

With this release, Workday provides several tasks, a new type of business object, and a new dataset stage type that when combined together, enable you to convert a Text field to an Instance field in a Prism dataset.

What do I need to do

To convert a Prism dataset Text field to an Instance field:

Use the Create Analytic Dimension Business Object task to create an analytic dimension business object and decide if it will allow hierarchies.

Use the Maintain Analytic Dimension Values task to define the values in the business object.

Use the Create Analytic Dimension Hierarchy task to define the hierarchies in the business object if it allows hierarchies. Make sure that you include every dimension value in a hierarchy.

Access the Edit Dataset Transformations task for a dataset that contains the Text field and add an Instance Mapping stage. Use the analytic dimension business object you created.

https://doc.workday.com/release-notes/en-us/prism/8759473.html

Analytic Dimensions for Prism Analytics, continued

Additional considerations

Analytic Dimension Business Objects

Workday introduces a new type of business object that you can create and edit called an analytic dimension business object. You can create analytic dimension business objects to store external dimension data in Workday as instance data.

you can bring in external dimensional data and store it in Prism Analytics as user-defined instance data.

With this release, Workday provides several tasks, a new type of business object, and a new dataset stage type that when combined together, enable you to convert a Text field to an Instance field in a Prism dataset.

What happens if I do nothing

Nothing happens. Data in Prism datasets and tables continue to function as they do currently.

https://doc.workday.com/release-notes/en-us/prism/8759473.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, continued

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

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

Financial Management - Accounting

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Financial Management Accounting top features

Automatically available

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Setup required

- Assign Match Status for Intercompany Journal Lines
- Company Ownership Details Report Data Source
- Display Custom Reports on the Close and Consolidation Hub
- Allocation Plans for Financial Accounting
- Worktag Change Lease Amendments

Assign Match Status for Intercompany Journal Lines

What's changing

To support manual intercompany matching and reconciliation reporting, Workday delivers new tasks to mark intercompany journal lines as available or unavailable for matching.

Additional considerations

Workday delivers these new tasks that you can use to update intercompany journal lines as available or unavailable for matching:

- **Mass Update Intercompany Journal Lines Match Status.**
- **Update Intercompany Journal Lines Match Status.**

Note: These features don't support:

- Alternate ledger currency intercompany journals.
- Translation adjustment journals.

What do I need to do

Configure security and ensure you have a role in all companies involved in the intercompany journals.

Set the status for intercompany journal lines you want as available or unavailable for matching by accessing these tasks:

- **Mass Update Intercompany Journal Lines Match Status** to update larger volumes of intercompany journal lines.
- **Update Intercompany Journal Lines Match Status** to update smaller volumes of intercompany journal lines or to manually select lines. Select the **Mark Related Two Sided Intercompany Journal Line** check box to apply the same match status to any related two sided intercompany journals.

https://doc.workday.com/release-notes/en-us/fincls/8485196.html

Assign Match Status for Intercompany Journal Lines, continued

What happens if I do nothing

You'll see no changes in Workday if you don't enable this feature.

https://doc.workday.com/release-notes/en-us/fincls/8485196.html

Setup required

Company Ownership Details Report Data Source

What's changing

Workday adds a new report data source (RDS) that enables you to view attachments you've previously uploaded for company ownership detail objects.

Additional considerations

Workday delivers a new Company Ownership Details report data source (secured to the Set Up: Consolidations domain) that you can use in custom reporting.

https://doc.workday.com/release-notes/en-us/fincls/8354670.html

Display Custom Reports on the Close and Consolidation Hub

What’s changing

Workday delivers a new Edit Card by Admin task (secured to the Set Up: Tenant Setup - General and Set Up: Tenant Setup - Cards domains) that you can use to display custom matrix reports in cards on the Overview tab of the Close and Consolidation hub. You can access this task by clicking the new Edit button that displays for each card on the Configure Hub by Admin task. You can access the Configure Hub by Admin task by first accessing the Maintain Hubs task, then selecting Action > Configure Overview for the Close and Consolidation hub. On the Edit Card by Admin task, you can configure:

- A custom matrix report to replace the default report on the card.
- Informational text to display on the card, such as a title or subtitle.
- An overview menu to link to other resources, such as websites or reports.

What do I need to do

Set up any matrix reports you want to display on cards in the Close and Consolidation hub. The following steps describe how to enable a report to be shown on the hub: mapping the report prompts to the prompts on the hub filters and selecting the required sharing option and output type. You also need to complete any other configuration needed for the report itself.

Access the Create Custom Report or Edit Custom Report task and create or select your matrix report.

To enable the filter prompts on the Close and Consolidation hub to adjust the data shown in the card, select a report data source or data source filter that has report fields as required or optional prompts that you can map to the hub filter prompts.

For the Consolidation Group hub filter prompt, you can map a Company or Company/Company Hierarchy report field.

https://doc.workday.com/release-notes/en-us/fincls/8606502.html

Display Custom Reports on the Close and Consolidation Hub, continued

Additional considerations

You can quickly view the information most relevant to your needs when you access the Close and Consolidation hub.

What do I need to do

For the Close Period hub filter prompt, you can map either a pair of start and end date report fields or a single accounting period report field.

For examples, see the attached document, Sample Report Configurations for Custom Cards on the Close and Consolidation Hub.

Navigate to the Prompts tab.

Map a company report prompt to the Consolidation Group hub filter prompt:

Add a row to the Prompt Defaults grid and select the Company or Company/Company Hierarchy field.

For the default type, select Determine default value at runtime.

For the default value, select Consolidation Group.

Select the Required check box.

https://doc.workday.com/release-notes/en-us/fincls/8606502.html

Display Custom Reports on the Close and Consolidation Hub, continued

What do I need to do

Select the Do Not Prompt at Runtime check box.

When the report data source or data source filter has start and end date prompts, map these to the Close Period hub filter prompt:

Add 2 rows to the Prompt Defaults grid and select the start and end date report fields.

For the default type, select Determine default value at runtime.

For the default values, select Fiscal Period Start Date and Fiscal Period End Date. On both rows, select the Required check box.

On both rows, select the Do Not Prompt at Runtime check box

https://doc.workday.com/release-notes/en-us/fincls/8606502.html

Display Custom Reports on the Close and Consolidation Hub, continued

What do I need to do

When the report data source or data source filter has an accounting period prompt, map it to the Close Period hub filter prompt:

Add a row to the Prompt Defaults grid and select the accounting period report field.

For the default type, select Determine default value at runtime.

For the default value, select Close Period.

Select the Required check box.

Select the Do Not Prompt at Runtime check box.

Add rows for all other prompts on the report data source or data source filter and select the Do Not Prompt at Runtime check box for each row.

Navigate to the Output tab and select the output type Chart.

https://doc.workday.com/release-notes/en-us/fincls/8606502.html

Display Custom Reports on the Close and Consolidation Hub, continued

What do I need to do

Navigate to the Share tab and select Share with all authorized users. Configure the Close and Consolidation hub to display your custom reports in cards on the Overview tab:

Access the Maintain Hubs task.

For the Close and Consolidation hub, select Action > Configure Overview.

On the Configure Hub by Admin task, click the Edit button for the card you want to display a custom report on.

On the Informational Text tab, select the Customize Title check box and enter a new title for the card.

On the Overflow Menu tab, add rows to the grid to set up an overflow menu for the card.

Select security groups or condition rules to control which users can see the overflow menu items.

https://doc.workday.com/release-notes/en-us/fincls/8606502.html

Allocation Plans for Financial Accounting

What's changing

With this release, Workday enhances the Allocation Pools feature and delivers new Allocation Plans. These plans support a financial process that allocates shared costs or revenue across various dimensions based on a top-down, customer-configured structure.

Workday offers a variety of changes with this release:

- Financial Accounting Enhancements.
- Security.
- Allocation Plan Tasks and Reports.
- Allocation Pool Tasks and Reports.
- Allocation Plan Business Processes.
- Managerial Reporting for Allocation Plans.
- Report Data Sources & Filters (RDSs/DSFs).

What do I need to do

Workday recommends creating allocation pools in order of lowest tier to highest tier; early planning of your configuration will aid in implementation of the feature.

Before you create an allocation plan, configure these steps:

- Map the new Allocation Pool journal source to the Allocation Pool operational transaction type by accessing the Maintain Journal Source Mapping to Operational Transactions task.
- Access the Maintain Period Close Activity Groups task to add the Allocation Pool Transaction operational transaction type to an existing period close activity group or create a new one.

https://doc.workday.com/release-notes/en-us/fincls/8684932.html

Allocation Plans for Financial Accounting, continued

Additional Considerations

You can use allocation plans to comply with legislative requirements, or a defined expense or revenue allocation. This allows for managing and reporting of shared costs across companies, cost centers, grants, and programs.

What do I need to do

Access the Edit Tenant Setup - Financials task to specify sequence generators for allocation pool transactions and allocation line groups.

Configure the new domain and business process security policies.

Access the Maintain Worktag Usage report to configure allowed worktag types on Allocation Pools.

For Payroll customers: Add Allocation Pool as an optional summary dimension on payroll summary journals by accessing the Maintain Payroll Journal Options task.

What happens if I do nothing

No impact. You'll see no changes in Workday if you don't configure this feature.

https://doc.workday.com/release-notes/en-us/fincls/8684932.html

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

Worktag Change Lease Amendments

What's changing

Workday provides a new Worktag Change lease amendment type that you can use to change worktags on the contract lines for operating lease contracts with straight-line or ROU asset operating expense accounting methods, enabling you to automatically update the lease accounting transactions.

Additional considerations

On the Maintain Supplier Contact Lease Amendment Types task, Workday displays a new Worktag Change check box that you can enable for a Worktag Change amendment type. You can only select 1 check box per amendment type.

What do I need to do

Access the Maintain Supplier Contact Lease Amendment Types task.

Add a row for a Worktag Change amendment type.

Select the Worktag Change check box.

What happens if I do nothing

You can only create amendments for:

- Lease Extension.
- Non-CPI Payment Change.

https://doc.workday.com/release-notes/en-us/fincore/8438119.html

Financial Management – Accounting Center

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Financial Management Accounting Center top features

Automatically available

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Setup required

- Analytic Dimensions in Accounting Center

Analytic Dimensions in Accounting Center

What do I need to do

By utilizing the new Instance Mapping Stage in Prism to convert a Text field to an analytic dimension Instance field, you will have the ability to group, filter, and prompt on these fields when reporting on a Prism data source using Workday reporting tools.

You can add Analytic Dimensions to your Accounting Center data in the enrichment stage of an Accounting Source and leverage them as additional attributes on your Detailed Journal Lines or introduce Analytic Dimensions in the Prism pipeline after Accounting Center processing is complete.

https://doc.workday.com/release-notes/en-us/finac/8780185.html

Analytic Dimensions in Accounting Center, continued

Additional Considerations

In upcoming release cycles, Workday plans to enable you to select analytic dimension values on these tasks:

- Configure Detailed Journal Additional Attributes.
- Create Accounting Center Detailed Journal.

In upcoming release cycles, Workday also plans to enable you to select analytic dimension values from the Configure Ingestion Fields for Editing prompt on the Edit Accounting Source task to make analytic dimension fields available on the Edit Ingested Data task.

https://doc.workday.com/release-notes/en-us/finac/8780185.html

Financial Management – Budgets

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Financial Management Budgets top features

Automatically available

- Modeled Sheet Data Validations
- Reset to Default View on Sheets

Setup required

Automatically available

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

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

Financial Management – Projects

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Financial Management Projects top features

Automatically available

- Report Field - Worker Is Assigned or Associated
- Project Budgets - Time and Expense for Phase and Task
- Enhance Schedule Project Budget Mass Update
- Project Phases and Tasks for Fixed Fee Customer Contract Lines, for Cost-Based % Complete
- Midweek Project Changes with Enter Time by Type

Setup required

- Task Level Forecasts on Resource Forecaster
- Transfer Project Time Blocks within Closed Time Entry Periods
- Add Bill-From and Ship-From Addresses and Commodity Code to Contract Billing

Task Level Forecasts on Resource Forecaster

What's changing

Workday makes these enhancements to the Resource Forecaster:

- When you add or edit a row, Workday includes a new prompt for Project Plan Tasks.
- Workday displays Project Plan Tasks in a new column labelled Task.
- Workday enables you to sort and filter the Task column, and drill down on the tasks displayed.
- Workday adds a new column labelled Action that enables you to edit or delete the selected row.

What do I need to do

If you've configured the Profile Group: Resources for Project Composite View Profile, use the Resource Forecaster to create and edit detailed resource forecast reports at the project task level. No additional configuration is needed.

What happens if I do nothing

If you choose not to use the Resource Forecaster to create resource forecast reports, you'll notice no changes.

https://doc.workday.com/release-notes/en-us/finprj/8755815.html

Task Level Forecasts on Resource Forecaster, continued

Additional considerations

This update gives you the option of using the Resource Forecaster's streamlined and convenient interface for creating task level resource forecasts. You can now take advantage of the Resource Forecaster's visibility and ease of navigation to create detailed resource forecasts with less time and effort.

https://doc.workday.com/release-notes/en-us/finprj/8755815.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

Automatically Available

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.

What do I need to do

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

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 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

Transfer Project Time Blocks within Closed Time Entry Periods

What's changing

Workday now enables you to transfer time blocks within closed time entry periods without triggering time calculations or retroactive payroll calculations to run.

This feature enables you to:

- Move time blocks to a different project in a closed period, supporting updates in billing without impacting payroll.
- Maintain work in progress for long periods and then transfer associated time blocks to other projects.
- Recoup billable hours.

Additional Considerations

Allow Project Transfer in Closed Periods Option

Workday adds a new, tenant-wide Allow Transfers Within Closed Time Entry Periods check box on the Project Transfer

What do I need to do

Access the Set Up Project Billing Configuration task.

On the Project Transfer Options tab, select the Allow Transfers Within Closed Time Entry Periods check box.

Identify time blocks that need to be moved to another project in a closed period.

Transfer the identified time blocks to another project through these supported tasks: Transfer Project Transactions or Manage Project Billing Transactions.

Additional Considerations

If time entry validations are triggered by the project transfer in a closed period, the validations prevent the project transfer from being completed.

If you reopen the period and make changes to the transferred time block or other time blocks in the period, all time blocks, including the transferred time block, are picked up in the next retroactive time calculation for the period.

https://doc.workday.com/release-notes/en-us/finrev/8380733.html

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Transfer Project Time Blocks within Closed Time Entry Periods, continued

Additional Considerations

Options tab on the Set Up Project Billing Configuration task.

When you select the option and have access to the Transfer Project Transactions task (secured to the Manage: Project Transaction Transfer subdomain under the parent Manage: Project domain), you can transfer time block transactions with dates that are in a closed time period to another project task.

Time Blocks

Workday adds a new Project Transferred in Closed Period field on the time block, enabling you to easily identify if the project time block is transferred during a closed time entry period. When it is, the field displays with a Yes value. Otherwise, the field isn't displayed.

Also, on the History tab of the time block, the Time Type column displays the project plan tasks that the time block was transferred from and to.

What do I need to do

There is no change to the existing behavior of project transfers in open periods.

If there are retroactive payroll triggering events prior to the project transfer time block event, the project transfer occurs and recalculates payroll.

Time blocks in locked periods behave the same as today, requiring user access to the Time Tracking: Exempt from Lockout domain

What happens if I do nothing

Access the Set Up Project Billing Configuration task.

On the Project Transfer Options tab, select the Allow Transfers Within Closed Time Entry Periods check box.

Identify time blocks that need to be moved to another project in a closed period.

https://doc.workday.com/release-notes/en-us/finrev/8380733.html

Transfer Project Time Blocks within Closed Time Entry Periods, Continued

Additional Considerations

Reporting

Workday delivers a new Project Transferred in Closed Period report field on these business objects (secured to the Reports: Time Tracking domain), which enables you to identify the time blocks that were transferred in a closed time entry period:

- Time Block.
- Time Review Event.

Workday also add a new entry to the Time Block Changes column on the standard Time Block Audit report, enabling you to identify that the project or project plan task was updated, either as a result of a project transfer or because it was edited by a user. In these cases, the column displays with Updated: Time Type.

https://doc.workday.com/release-notes/en-us/finrev/8380733.html

Transfer Project Time Blocks within Closed Time Entry Periods, Continued

Additional Considerations

Retroactive Payroll

Time blocks transferred in closed periods don't trigger retroactive payroll calculations. If there are retroactive payroll triggering events prior to the project transfer time block event, the project transfer occurs and recalculates payroll.

https://doc.workday.com/release-notes/en-us/finrev/8380733.html

Add Bill-From and Ship-From Addresses and Commodity Code to Contract Billing

What's changing

Enable the Ship From Address, Bill From Address, and Commodity Code fields at the customer contract level so that their values become the default values for those fields in customer invoices.

Additional Considerations

Workday adds the Bill-From Address and Ship-From Address fields on the Create Customer Contract task, dependent on the status of the Enable Bill-From Address and Ship-From Address on Customer Invoice option on the Edit Customer Account Options task.

Workday adds the Commodity Code column to the contract lines grid on the Create Customer Contract task.

What do I need to do

Select the Enable Bill-From Address and Ship-From Address on Customer Invoice option on the Edit Customer Account Options task.

What happens if I do nothing

Your customer contract lines will include the Commodity Code field.

If the Enable Bill-From Address and Ship-From Address on Customer Invoice option on the Edit Customer Account Options task isn't selected, your customer contracts won't include the Bill-From Address and Ship-From Address fields.

https://doc.workday.com/release-notes/en-us/finrev/8380721.html

Add Bill-From and Ship-From Addresses and Commodity Code to Contract Billing, continued

Additional Considerations

Web Services

Workday adds new fields Bill-From Address and Ship-From Address at the header level to the Submit Customer Contract web service.

Workday adds new fields Ship-From Address and Commodity Code at the line level to the Submit Customer Contract web service.

Reporting

Workday delivers these new report fields on the Customer Invoice Document business object (secured to the Public Reporting Items domain) that you can use in custom reports:

- Company Bill-From Address (The Bill-From Address on the customer contract header).
- Company Ship-From Address (The Ship-From Address on the customer contract header).

https://doc.workday.com/release-notes/en-us/finrev/8380721.html

Add Bill-From and Ship-From Addresses and Commodity Code to Contract Billing, continued

Additional Considerations

Workday delivers these new report fields on the Customer Contract Line business object (secured to the Public Reporting Items domain) that you can use in custom reports:

- Commodity Codes (The commodity codes for the customer contract line).
- Company Ship-From Address (The ship-from location on the customer contract line).

https://doc.workday.com/release-notes/en-us/finrev/8380721.html

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

Automatically available

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

Financial Management – Customer Accounts

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Financial Management Customer Accounts top features

Automatically available

- Prevent Update Conflicts for Customer Payment Auto-Application Task and Web Services
- Customer/Sponsor for Transaction Report Field
- Local Commodity Codes on Invoice Lines
- View Intercompany Receipt Fields
- Workday Docs for Layouts for Customer Statements

Setup required

- Customer Refund Reporting
- Separate Payments for Customer Refunds in Settlement Runs
- Service Catalog in Services CPQ

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

Customer Refund Reporting

What's changing

With this update, Workday delivers new customer refund report fields that you can use in your custom reports.

***Note**: To use these report fields, you must opt in to the Customer Refunds Optimization feature on the Maintain Feature Opt-Ins report.*

Additional considerations

Workday delivers a new Approved Customer Refund Payment report field on the Customer Refund business object, which you can use in custom reports to view the most recently approved customer refund payment associated with the refund.

Workday also delivers these new report fields on the Customer Refund Detail business object (secured to the Public Reporting Items domain) that you can use to view the refund payment details:

What do I need to do

On the Maintain Feature Opt-Ins report, opt in to the Customer Refunds Optimization feature.

Create and settle refunds for your on-account payments and credit adjustments.

Create a copy of your standard report and include the new report fields in the report.

View the customer refund details on your custom report.

What happens if I do nothing

If you choose not to opt in to the customer refunds optimization feature, you can't create custom reports with the new report fields.

https://doc.workday.com/release-notes/en-us/fincust/8586099.html

Customer Refund Reporting, continued

Additional considerations

- Refund Document Date.
- Transaction Number.
- Transaction Type.

https://doc.workday.com/release-notes/en-us/fincust/8586099.html

Separate Payments for Customer Refunds in Settlement Runs

What's changing

With this release, Workday enables you to process separate payments for customer refunds in a settlement run. Workday also renames and groups the payment separation options on the customer and sponsor profile for clarity.

***Note**: To use this enhancement, you must opt in to the Customer Refunds Optimization feature on the Maintain Feature Opt-Ins report.*

Additional considerations

There is a new Separate Payments section on the Payment Details page of the Customer and Sponsor profile pages that contains two new fields:

- Customer Invoices: this field replaces the Always Separate Payments field and is used for the same purpose.

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What do I need to do

On the Maintain Feature Opt-Ins report, opt in to the Customer Refunds Optimization feature.

Enable settings to separate payments for customer refunds on a customer or sponsor profile.

Create a copy of the Find Customers standard report to find customers with Always Separate Refund Payments enabled.

Create a copy of the Find Sponsors standard report to find sponsors with Always Separate Refund Payments enabled.

Create customer refunds with the same settlement company, payee, payee remit-to address, payment type, currency, and bank account.

Settle the customer refunds.

https://doc.workday.com/release-notes/en-us/fincust/8501451.html

Separate Payments for Customer Refunds in Settlement Runs, continued

Additional considerations

- Customer Refunds: this is a new field to separate customer refund payments during a settlement run.
- This new Separate Payments section is only visible when Customer Refunds 2.0 has been enabled.
- If you enter text in the Memo field on the Create Customer Invoice task, the memo text will continue to appear in the remittance of a single refund payment

What happens if I do nothing

If you choose not to opt in to the customer refunds optimization feature, you can't uptake this enhancement.

If you don’t select to separate the customer refunds, Workday continues to group refund documents with the same settlement company, payee, payee remit-to address, payment type, currency, and bank account into 1 refund payment.

https://doc.workday.com/release-notes/en-us/fincust/8501451.html

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

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

Setup required

Service Catalog in Services CPQ

What's changing

With this release, Workday delivers a Services Catalog as part of the Services CPQ functionality that enables you to add a service to the quote from a pre-configured list. This capability allows you to pre-define the duration, roles, items, expenses, and third-party costs for a service type and then default all the data into the quote.

What do I need to do

Create a catalog of services for various roles and hours to define the baseline effort needed for the service.

Access the Maintain Services Catalog task.

Click Create Service and specify the values for the duration of the service, roles, items, expenses, and third-party costs. You can also specify the project hierarchy.

If you do not want to isolate the service to just 1 project hierarchy, you can leave it blank. The sales specialist can select it when they add the service to a quote.

You can’t add amounts for expenses and third party costs. The sales specialist will need to enter it when they add the service to a quote.

https://doc.workday.com/release-notes/en-us/fincpq/8681926.html

Service Catalog in Services CPQ, continued

Additional Considerations

Workday delivers a new Maintain Services Catalog task (secured to the Set Up: Quotes and Process: Quotes domain) task that enables you to:

- Create a baseline service.
- Edit, copy, activate, or inactivate services defined in the
- catalog. Sales specialists can only add services from a \
- catalog to quotes after the service is activated.
- Edit the facets that sales specialists use to search the
- catalog.
- Add or edit snippets to a service.

Note*: The services defined in the catalog are created as a High Level service on the quote. Phases and Tasks capability will be added in future releases.*

What do I need to do

The roles and items will be priced based on the Project Billing Rate Sheet and Sales Item Price List selected by the sales specialist when they add the service to a quote.

After creating the service, navigate to the last column for the new service in the same task. Click Action and select Activate. You can also select Edit, Copy, or Inactivate to take further action on the service.

Note*: You must activate the pre-configured service as it enables the sales specialists to select it from the catalog when creating a quote.*

Create snippets to pre-configure commonly used service-related document content and embed them into quote documents

https://doc.workday.com/release-notes/en-us/fincpq/8681926.html

Service Catalog in Services CPQ, continued

Additional Considerations

Workday delivers a new Create Services task (secured to the Set Up: Quotes domain) that you can access from the Maintain Services Catalog task, enabling you to configure roles, non-recurring items, expenses, third-party costs, default duration in weeks, search tags, and project hierarchy for the service. For example, you can create a pre-configured Software service, or Accounting service.

Workday delivers a new Create Snippets task (secured to the Set Up: Quotes domain) that you can access from the Action button of a specific service in the Maintain Services Catalog task.

What do I need to do

Access the Maintain Quote Document Snippet Categories task and click + to add a snippet category.

Access the Maintain Services Catalog task.

Click Action for a desired service and select Add Snippet.

On the Create Snippet page, select a Document Snippet Category and draft the content for this snippet. When done, click Add.

Access the Maintain Quote Configurations task, edit the relevant Document Template, search for the Document Snippet Category under Dynamic Data in right pane, and insert in the desired location of the template.

https://doc.workday.com/release-notes/en-us/fincpq/8681926.html

Service Catalog in Services CPQ, continued

Additional Considerations

Snippets enable your CPQ administrator to add pre-configured service-related document content, providing convenience and standardization. For example, you can define snippets for services you provide that have standard business language such as Terms & Conditions, Scope, Legal Disclaimers. When you generate a quote document, the snippet content is added automatically based on the services selected in the quote.

Workday recommends adding the name of the Service to the start of each Snippet so as to easily identify them when they are retrieved in the quote document.

What happens if I do nothing

You won’t be able to add a predefined service from the services catalog to the quote.

https://doc.workday.com/release-notes/en-us/fincpq/8681926.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 – Supply Chain

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Financial Management Supply Chain top features

Automatically available

- Ability to Restrict Access to Ad Hoc Inventory Put Aways
- Supplier Accounts Hub Enhancements
- Display All Names for Requisitions Awaiting Action by Multiple Users in the Requisitions Worklet

Setup required

- Ensure OCR Supplier Invoices Have Required Fields
- Wave Picking
- Manufacturer & Manufacturer Part Number as Primary Attributes for Purchase Items
- Mass Cancel Framework for Inventory Documents
- Lot and Serial for Consignment Requisitions and Purchase Orders
- Hide or Show Optional Fields on Supplier Invoices

Ensure OCR Supplier Invoices Have Required Fields

What's changing

Workday adds to the list of fields that you can make required and which Workday validates for touchless supplier invoices. The additional supplier invoice fields are:

- Approver.
- Control Total Amount.
- Document Link.
- Document Memo.
- External PO Number.
- Reference Type.
- Statutory Invoice Type.
- Supplier's Invoice Number.
- Supplier Document Received.

What do I need to do

To set up this feature:

- Navigate to Configure Optional Fields > Supplier Accounts > Supplier Invoice Event.
- Select the fields that you want to be required. See the release notes for Hide or Show Optional Fields on Supplier Invoices in the related links section to see what fields are supported.
- If a scanned or emailed invoice that is eligible for auto-submission has a missing required field, Workday creates it as a draft invoice and doesn't automatically submit it to the business process.

***Note**: Requiring supplier invoice fields is currently not supported for web services.*

If an invoice is auto-submitted via the web service and is missing a field required by Configure Optional Fields, the web service can still submit the invoice to the Supplier Invoice Event.

https://doc.workday.com/release-notes/en-us/finsa/8747592.html

Ensure OCR Supplier Invoices Have Required Fields, continued

Additional considerations

You'll see no changes in Workday if you haven't set up this feature.

What happens if I do nothing

If you don't set up this feature, you can't use it.

https://doc.workday.com/release-notes/en-us/finsa/8747592.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

Wave Picking

What's changing

Workday delivers these new tasks that you can use to create and view inventory waves for picking:

Create Inventory Waves (secured to the Process: Inventory Pick List - Create/Edit domain)

View Inventory Wave (secured to the Process: Inventory Pick List - View and Self-Service: Inventory domains)

The new Create Inventory Waves task groups pick lists together by deliver-to location.

Workday delivers a new Enable Wave Picking option on the Picking tab of these tasks and web services that you can use to activate wave picking for the inventory site:

- Maintain Inventory Site.
- Get Inventory Location Attributes.
- Put Inventory Location Attributes.

What do I need to do

On the Maintain Inventory Site task, select the Use Directed Picking option to display all of the options, and select Enable Wave Picking.

To configure the sequence generator, either use the Edit Tenant Setup - Financials task and configure the ID Generator for Inventory Waves prompt or the Edit Company ID Definitions task and configure the Default ID Generator for Inventory Waves field.

Create a custom report using the new Inventory Wave data source and Inventory Wave filter to easily find waves and their status.

(Optional) Review your pick list print layout and update to add wave picking.

https://doc.workday.com/release-notes/en-us/sminv/7657587.html

Wave Picking, continued

What's changing

When making changes using the web services, you can only deactivate the new option once all waves are closed.

Workday adds a new ID Generator for Inventory Waves prompt to these tasks and web services that you can use to select an ID sequence generator to automatically number inventory waves across all companies:

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

Workday also adds a new Default ID Generator for Inventory Waves field to these tasks and web services that you can use specify an ID generator to take precedent for a company in your deployment:

- Edit Company ID Definitions.
- Get Company ID Definitions.
- Put Company ID Definitions.

What happens if I do nothing

There is no impact.

https://doc.workday.com/release-notes/en-us/sminv/7657587.html

Wave Picking, continued

What’s changing

Workday adds a new Inventory Wave prompt to the Pick Inventory task that you can use to select a wave for an inventory pick. Workday also adds these fields to the Details Tab of the Pick Inventory task to display information about inventory waves you select for your picks:

- Wave Name.
- Wave Number.

Workday delivers a new Inventory Wave prompt to the Mass Assign and Print Pick Lists task that you can use to assign an inventory wave to a picking lists.

Reporting

Workday delivers a new Inventory Wave business object that you can use in custom reports and condition rules for inventory waves. Workday delivers these new report fields (secured to the Public Reporting Items domain) on the new business object:

https://doc.workday.com/release-notes/en-us/sminv/7657587.html

Wave Picking, continued

What's changing

- Created on.
- Inventory Site.
- Inventory Wave.
- Picking List.
- Wave Created By.
- Wave Name.
- Wave Number.
- Wave Status.

Workday delivers a new Inventory Wave report data source on the Inventory Wave business object (secured to the Reports: Inventory Pick List domain) that you can use to return information about current and completed inventory waves and their associated pick lists.

https://doc.workday.com/release-notes/en-us/sminv/7657587.html

Wave Picking, continued

What's changing

Workday delivers a new Inventory Wave data source filter on the new Inventory Wave report data source (secured to the Reports: Inventory Pick List domain) that you can use to filter inventory waves by inventory site in your reports. You must input an inventory site on the filter to properly use it in your reports.

Workday delivers these new report fields on the Picking List business object (secured to the Public Reporting Items domain) that you can use in custom reports on inventory waves and their associated pick lists:

- Inventory Wave.
- Inventory Wave Number and Name.

Workday delivers a new Inventory Wave data source filter on the Inventory Wave data source(secured to the Reports: Inventory Pick List domain) that you can use to filter waves by inventory site. You must enter an inventory site on the filter to activate it.

https://doc.workday.com/release-notes/en-us/sminv/7657587.html

Wave Picking, continued

What’s changing

Workday adds a new Inventory Wave column to the Find Inventory Picking List report to display inventory waves associated with picking lists.

Additional considerations

Workday adds a new Inventory Wave column to the Find Inventory Picking List report to display inventory waves associated with picking lists. This will not display for users until production delivery.

https://doc.workday.com/release-notes/en-us/sminv/7657587.html

Manufacturer & Manufacturer Part Number as Primary Attributes for Purchase Items

What's changing

Workday delivers a new Item Management identifier type on the Maintain Item Identifier Type Display Options task that you can use to display these values on purchase item headers:

- Manufacturer.
- Manufacturer Part #.

Workday also updates these web services with the new Item Management identifier type:

- Get Item Identifier Type Display Options
- Put Item Identifier Type Display Option

When you configure these new identifiers, Workday now displays these fields on purchase items at the header level:

- Manufacturer Part Number.
- Manufacturer.

What do I need to do

Use the Maintain Item Identifier Display Options task to configure the Item Management Display Options to include Manufacturer and Manufacturer Part Number.

What happens if I do nothing

There is no impact

https://doc.workday.com/release-notes/en-us/sminv/8401982.html

Manufacturer & Manufacturer Part Number as Primary Attributes for Purchase Items, continued

What’s changing

Workday updates these tasks and web services for the change in fields:

- Create Purchase Item.
- Edit Purchase Item.
- Get Purchase Items.
- Put Purchase Item.

Workday only displays these fields on items when manufacturer options are enabled on the item's spend category.

https://doc.workday.com/release-notes/en-us/sminv/8401982.html

Manufacturer & Manufacturer Part Number as Primary Attributes for Purchase Items, continued

Additional considerations

Review reports as the manufacturer part number and manufacturer will display on the Find Purchase Items report in the Alternate Item Identifiers column. Consider building custom reports to pull these fields to their own column.

You can only configure one manufacturer and manufacturer part number per item.

If there are multiple part numbers on an item, Workday displays and alert validation when you are on the Edit Purchase Item task.

https://doc.workday.com/release-notes/en-us/sminv/8401982.html

Mass Cancel Framework for Inventory Documents

What's changing

Workday delivers a new Cancel Inventory Documents type to the Mass Operations Management task that you can use to locate and take cancellation action on these inventory transaction documents:

- Goods Delivery.
- Inventory Count.
- Par Count.
- Quick Issue.

You can filter documents by any parameter of the transaction such as:

- Company.
- Created By.
- Inventory Site.

What do I need to do

Create a segment security group with access to the new Mass Cancel Inventory Document security segment.

Add the new security group of users to the Mass Operation Management domain.

Access and run the Activate Pending Security Policy Changes task.

Create a custom report with filters for the respective document types.

Run the Mass Operation Management task using the Cancel Inventory Documents type and the report you create in step 4.

Once you complete the task Workday cancels documents that are in Draft status based on the selection of empty or nonempty line.

Workday recommends you don't use a report in the Input Report prompt that filters documents for the current day.

https://doc.workday.com/release-notes/en-us/sminv/8402564.html

Mass Cancel Framework for Inventory Documents, continued

What's changing

Reporting

Workday delivers these new data sources filters that you can use to access draft documents of inventory transactions:

- Goods Delivery Filter for Mass Cancel on the Goods Delivery report data source (secured to the Reports: Goods Delivery domain).
- Inventory Count Filter for Mass Cancel on the Inventory Count Sheet report data source (secured to the Reports: Inventory Count domain).
- Par Count Filter for Mass Cancel on the Par Count report data source (secured to the Reports: Par Inventory domain).
- Quick Issue Filter for Mass Cancel on the Quick Issue report data source (secured to the Reports: Inventory domain).

What happens if I do nothing

There are no impacts if you do nothing

https://doc.workday.com/release-notes/en-us/sminv/8402564.html

Mass Cancel Framework for Inventory Documents, continued

What’s changing

Workday delivers these new report fields (secured to the Public Report Items domain) that you can use in custom reports and condition rules on mass cancellation of inventory transaction documents:

- Assigned to ~Employee~ on the Business Document business object.
- Company for Goods Delivery Filter for Mass Cancel on the Goods Delivery business objects.
- Company for Inventory Count Sheet for Mass Cancel on the Inventory Count Sheet business object.
- Company for Par Count Filter for Mass Cancel on the Inventory Par Count business object.
- Company for Quick Issue Filter for Mass Cancel on the Quick Issue business object.

https://doc.workday.com/release-notes/en-us/sminv/8402564.html

Mass Cancel Framework for Inventory Documents, continued

What's changing

- Document Created By ~Worker~ on the Business Document business object.
- From Date for Cancel on the Business Document business object.
- Goods Delivery Location for Goods Delivery Filter for Mass Cancel on the Goods Delivery business object.
- Inventory Count Sheet Location for Inventory Count Sheet Filter for Mass Cancel on the Inventory Count Sheet business object.
- Inventory Par Location for Par Count Filter for Mass Cancel on the Inventory Par Count business object.
- Inventory Site for Quick Issue Filter for Mass Cancel on the Quick Issue business object.
- To Date for Cancel on the Business Document business object.

https://doc.workday.com/release-notes/en-us/sminv/8402564.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

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

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

Lot and Serial for Consignment Requisitions and Purchase Orders

What's changing

Workday enables you to specify and update lot and serial information directly on consignment requisitions and purchase orders.

Additional considerations

Tasks

Workday adds a new Lot and Serial option to the Maintain Requisition Types and Maintain Purchase Order Types tasks that you can select when creating requisition or purchase order types. By default, Workday also auto-selects the Lot and Serial option when you select the Bill Only option for a requisition or purchase order type. You can deselect the Lot and Serial option to create a bill-only requisition or purchase order type without lot and serial.

Workday updates these requisition tasks, enabling you to specify or edit lot and serial information on consignment requisitions:

What do I need to do

Create new requisition and purchase order types in the Maintain Requisition Types task and Maintain Purchase Order Types task to include the new lot and serial type for relevant consignment requisitions and purchase orders. This will allow you to use both new ad hoc lot and serial numbers on requisitions and purchase orders. You'll also continue to be able to use instance-based lot and serial added during put away. The new lot and serial functionality for consignment requisitions and purchase orders isn't available in Preview for web services version 43.1. To test this functionality in Preview, use web services version 44.0 or later instead.

What happens if I do nothing

If you do nothing, you can continue to use instance-based lot and serial numbers added during put away. Your bill-only requisitions and purchase orders will continue to have ad hoc lot and serial number fields.

https://doc.workday.com/release-notes/en-us/smorder/7610409.html

Lot and Serial for Consignment Requisitions and Purchase Orders, continued

Additional considerations

- Create Requisition.
- Edit Requisition.
- Review Requisition.
- Revise Requisition.

Workday updates these purchase order tasks, enabling you to specify and edit lot and serial information on consignment purchase orders:

- Create Purchase Order.
- Edit Purchase Order.
- Review Purchase Order.
- Revise Purchase Order.

Workday also updates the Approve Purchase Order and Cancel Purchase Order tasks to enable you to view lot and serial information on your purchase orders.

Workday updates these change order tasks, enabling you to specify or edit lot and serial information on consignment change orders:

- Create Change Order.
- Edit Change Order.
- Review Change Order.
- Revise Change Order.

https://doc.workday.com/release-notes/en-us/smorder/7610409.html

Lot and Serial for Consignment Requisitions and Purchase Orders, continued

Additional considerations

Workday also update the Approve Change Order and Cancel Change Order tasks to enable you to view lot and serial information on your change orders.

Reports:

Workday updates the View Requisitions report to enable you to view ad hoc lot and serial information on consignment requisitions.

Workday also updates these reports to display lot and serial information on your purchase orders and change orders:

- View Purchase Order.
- View Purchase Order Changes.
- View Purchase Order History.
- View Change Order.

Report Fields:

Workday delivers a new Lot and Serial report field (secured to the Public Reporting Items domain) on the Abstract Spend Type business object that you can use in custom reports.

https://doc.workday.com/release-notes/en-us/smorder/7610409.html

Lot and Serial for Consignment Requisitions and Purchase Orders, continued

Additional considerations

Workday also updates these report fields to include information on any consignment purchase order or requisition line instead of just bill-only transactions:

- Lot Number on the Purchase Order Line business object.
- Lot Number on the Requisition Line business object.
- Lot Number on the Lot Serial Information business object.
- Serial Number on the Purchase Order Line business object.
- Serial Number on the Lot Serial Information business object.
- Serial Number on the Requisition Line business object.

Web Services:
Workday updates the Get Requisition Types and Put Requisition Type web services, enabling you to maintain which requisition types you can specify ad hoc lot and serial information on.

https://doc.workday.com/release-notes/en-us/smorder/7610409.html

Lot and Serial for Consignment Requisitions and Purchase Orders, continued

Additional considerations

Workday updates the Get Purchase Order Types and Put Purchase Order Type web services, enabling you to maintain which purchase order types you can specify ad hoc lot and serial information on.

Workday also updates the Get Purchase Orders and Submit Purchase Order web services, enabling you to view or edit lot and serial information on your purchase orders.

Workday updates these change order web services, enabling you to view or edit lot and serial information on your change orders for lot and serial purchase orders:

- Bulk Import Submit Purchase Change Order.
- Get Purchase Order Change Orders.
- Submit Purchase Order Change Order.

Integration

Workday now populates lot and serial numbers that are manually added to purchase orders in the purchase order lines of your outbound EDI 850 integration XML files.

https://doc.workday.com/release-notes/en-us/smorder/7610409.html

Hide or Show Optional Fields on Supplier Invoices

What's changing

Workday now enables you to hide or make optional fields required on supplier invoices and supplier invoice adjustments.

Additional considerations

You can now use the Configure Optional Fields task to hide or require fields on the following business documents and their related tasks:

- Supplier Invoice Adjustments.
- Supplier Invoices.
    - Tasks: Create/Copy/Edit/Review/Revise.
    - Flip from: PO/Receipt/Supplier Invoice Request/Contract.

***Note**: When you make a field required, you can't submit the invoice unless the field is populated.*

What do I need to do

If you want to hide or make a field required for supplier invoices, you can uptake this feature using the Configure Optional Fields task.

Configuration Steps:

- Navigate to Configure Optional Fields > Supplier Accounts > Supplier Invoice Event.
- Select the fields that you want to be hidden or required.

If you choose Security Group in the Criteria field, you can specify which security groups the field is hidden for or required for.

What happens if I do nothing

If you don't perform the required setup, you can't show or hide fields on supplier invoices.

https://doc.workday.com/release-notes/en-us/finsa/8482471.html

Financial Management – Reporting

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Financial Management Reporting top features

Automatically available

- Workday Docs for Layouts for Customer Statements
- Historical Data in the Reporting Model

Setup required

- Support for Accounting Center Data in OfficeConnect for Financial Management
- Commitment and Obligation Ledgers as Versions

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

Support for Accounting Center Data in OfficeConnect for Financial Management

What's changing

For OfficeConnect for Financial Management, Workday now enables you to report on these data stored in Prism data sources:

- Accounting Center data.
- Other ledger-like data.

Additional considerations

For Financial Management customers, Workday now provides these new tasks secured to the Set Up Reporting Model domain:

- Create Field Mapping for Reporting Model.
- Edit Field Mapping for Reporting Model.
- View Field Mapping for Reporting Model.
- Create Custom Fields.
- Create Custom Version.

What do I need to do

To enable reporting on Accounting Center and Prism data, you must:

- Map fields from your Prism data source to the reporting model data source using the Field Mapping for Reporting Model task.
- (Optional) Create any tenanted fields that currently aren't available to the reporting model using the Create Custom Fields task. Also, you must then map these fields to the reporting model data source.
- During mapping, specify the version associated with the Prism data source:

To specify a single version for all records in the data source, use the Create Custom Version task.

https://doc.workday.com/release-notes/en-us/anafin/8625558.html

Support for Accounting Center Data in OfficeConnect for Financial Management, continued

Additional considerations

Workday updates the Set Up Reporting Model task for configuring versions:

- In the Versions section, you can configure the Accounting Center Journals version and other custom versions to include Prism data

Workday currently supports up to:

- 10 custom versions and 10 data sources per version.
- 15 Billion rows per version.

In the Show Details section, you can configure fields for each custom version, such as Accounting Center Journals, for the Show Details option in OfficeConnect.

In the Dimensions section, you can add dimensions that are applicable to the Prism data sources you configure.

What do I need to do

To assign different versions to different records in the Prism data source, select a source field from the Prism data source.
Configure the reporting model to include the mapped prism data as versions using the Set Up Reporting Model task.
End users can then see the Accounting Center and prism data as versions in OfficeConnect for Financial Management.

What happens if I do nothing

You'll see no changes in Workday if you haven't set up this feature. The field mappings and related versions won't be available to your reporting model.

End users won’t see Accounting Center or other custom versions for Prism data in OfficeConnect for Financial Management.

https://doc.workday.com/release-notes/en-us/anafin/8625558.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

Commitment and Obligation Ledgers as Versions

What's changing

For OfficeConnect for Financial Management, administrators can now configure additional versions and corresponding Show Details fields for these versions.

In the Set Up Reporting Model task, administrators can now configure:

Additional versions for:

- Commitment Ledger.
- Obligation Ledger.
- Show Details fields specifically for these Versions.

What do I need to do

To use the Commitment and Obligation Ledgers:

- Run the Set Up Reporting Model task.
- From the Versions section, add the ledgers as versions.
- Optional: Configure Show details for each version.

End users can then see these versions as elements in OfficeConnect.

What happens if I do nothing

Commitment and Obligation Ledgers will not be available for reporting in OfficeConnect for Financial Management.

https://doc.workday.com/release-notes/en-us/doc/7739460.html

Financial Management – Banking

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Financial Management Reporting top features

Automatically available

- Bank Accounts Associated to Company Hierarchy for Workday Bank Connectivity

Setup required

-

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

Financial Management – Grants

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Financial Management Grants top features

Automatically available

- Financial Reporting for Award Spending
- Removed Reliance on Single Legal Entity Profile for Award Line Company Selection

Setup required

-

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

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 – Endowment

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Financial Management Grants top features

Automatically available

- Attachments Report Fields for Endowments
- Role Assignments on Inactive Gifts and Gift Hierarchies

Setup required

-

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, 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 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 – Expenses

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Financial Management Expenses top features

Automatically available

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Setup required

- Enhanced Security for Credit Card Accounts, Files, and Transactions

Enhanced Security for Credit Card Accounts, Files, and Transactions

What's changing

Workday delivers a new Process: Credit Card Files domain that:

- Secures tasks, reports, data sources, and web services related to credit card transaction files.
- Only supports unconstrained security groups.

Workday automatically copies over all security groups from the Process: Credit Card domain to the new Process: Credit Card Files domain. Members of these security groups retain unconstrained access until you remove them from the security policy. You can only make changes to your domain policy after you remove any invalid security groups from the policy. Workday also updates these existing domains to provide security group restrictions by supporting Roles - Company and unconstrained security groups:

- Set Up: Credit Card.
- Process: Credit Card.

What do I need to do

To opt in to this feature:

- Access the Maintain Feature Opt-Ins report.
- Find the Enhance Expense Credit Card-Related Security feature.
- Click Opt In To Feature.

Use the Security Exception Audit report to find and fix security issues and identify security groups that are no longer permitted on the impacted domains. Workday recommends that you evaluate your security groups on the impacted domains and ensure user groups are provided the appropriate security access.

https://doc.workday.com/release-notes/en-us/finexp/8243465.html

Enhanced Security for Credit Card Accounts, Files, and Transactions, continued

What's changing

The domains secure tasks, reports, data sources, and web services related to corporate credit card billing account, credit cards and credit card transactions.

Once you opt in, you can access a credit card billing account or credit cards through either:

- Unconstrained security.
- A role in a company associated with the credit card billing account.

You can access credit card transactions through either:

- Unconstrained security.
- A role in a company associated with the credit card billing account.
- A role in a company associated with the expense report containing the transaction.
- A role in a company associated with the expense payee who owns the transaction.

What do I need to do

To remove invalid security groups:

- Access the Security Exception Audit report.
- Select the Domain Security Policy that has invalid security groups.
- Click Edit Permissions.
- Remove invalid security groups.
- Click OK and Done.
- Access the Activate Pending Security Policy Changes task.
- Describe your changes in the Comment field.
- Select the Confirm check box to activate your changes.

https://doc.workday.com/release-notes/en-us/finexp/8243465.html

Enhanced Security for Credit Card Accounts, Files, and Transactions, continued

What's changing

- A role in an organization associated with central travel card transactions.

Billing Accounts Access to billing accounts and related credit cards is based on the company associated with the account. If a billing account is empty, only unconstrained users can access the account

As part of this enhancement, Workday enables you to add a company to a billing account, even if the account already has transactions, provided the account didn't previously have an associated company. This enables you to revisit billing accounts and provide more granular control to administrators based on the roles in your company. Workday only allows you to make this change once.

What happens if I do nothing

If you don't opt in to the feature, you can continue using your existing security but these changes might impact you: Workday automatically copies over all security groups from the Process: Credit Card domain to the new Process: Credit Card Files domain. Existing web services related to credit card and credit card transactions might exhibit inconsistent behavior until you opt in to the feature. Constrained security roles won't be able to update credit card transactions using web services.   Regardless of whether you opt in or not, integration system users with constrained access can no longer run the Import Credit Card and Import Credit Card Transactions web services for billing accounts without a company. Workday recommends that you opt in to the feature to take advantage of the enhanced security for your organization.

https://doc.workday.com/release-notes/en-us/finexp/8243465.html

Enhanced Security for Credit Card Accounts, Files, and Transactions, continued

What’s changing

Regardless of whether you opt in or not, integration system users with constrained access can no longer run the Import Credit Card and Import Credit Card Transactions web services for billing accounts without a company. In preparation for future retirement, Workday appends (DO NOT USE) to these report fields and replace them with report fields of the same name:

- Company.
- Company of Expensing ~Worker~.
- Credit Card for Credit Card Transaction.
- Corporate Credit Card Account.
- Corporate Credit Card Accounts.
- Organization.

https://doc.workday.com/release-notes/en-us/finexp/8243465.html

Enhanced Security for Credit Card Accounts, Files, and Transactions, continued

What's changing

In preparation for future retirement, workday appends (DO NOT USE) to these data source filters and replace them with data source filters of the same name:

- Credit Card Transactions for Company.
- Expense Credit Card Transaction.

The old report fields and data source filters will remain available for the next 18 months. Workday will update all standard reports containing the impacted report fields and data source filters. Workday recommends that you update any custom reports that currently use the old report fields and data source filters.

Considerations Tasks and Reports Organization-based roles can no longer see cards or transactions related to the Process: Credit Card or Setup: Credit Card domains.

https://doc.workday.com/release-notes/en-us/finexp/8243465.html

Human Capital Management

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Human Capital Management top features

Automatically available

- Edit To Do Task
- Automatic Advance of Business Processes when Integrations Fail
- Manager Insights Hub
- Change Job New User Experience for Corrections
- Supervisory Organization Editable on the Change Job Business Process
- Enhanced Offboarding Resignation User Experience
- Change Job Templates New User Experience on Mobile
- Security History for Users Audit Report
- Increased Flexibility for Compa-Ratio and Position in Range Fields

Setup required

- Configure Optional Fields for Change Job
- Job Description Generation on Job Profile
- Configure Additional Address Components
- Rescind Manage Job Profile Business Process
- Effective Dating for Service Dates
- View Additional Organizations on Org Chart Side Panel
- Total Rewards Template Conversion
- Minimum Wage in Compensation
- Configurable Visibility of Pools and Budget Wheels in Compensation Reviews

Human Capital Management top features

Automatically available

- Infinite Scrolling on Compensation Review Grid
- SOAP Import Web Services for Benefits

Setup required

- Individual Target Improved User Interface for Funded Plans
- Propose Compensation Hire as Substep of Hire with Enhanced User Interface
- Purge Dependents and Beneficiaries for Active Workers
- Benefit Credit Offsets for Workday Payroll

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

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

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.

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 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.

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

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

Configure Optional Fields for Change Job

What’s changing

With this release, Workday enables you to configure additional Change Job fields on the **Configure Optional Fields** task.

Additional considerations

Workday now enables you to configure these fields on the Change Job business process using the Configure Optional Fields task:

- Academic - Annual Work Period.
- Academic - Work Period Percent of Year.
- Academic - Disbursement Plan Period.
- Employee Type.
- Time Type.
- Working Time.
- Contingent Worker Type.
- Select a Job Requisition for this change.
- This person is a manager. Will their team be moving with them?
- Currency.
- Frequency.

https://doc.workday.com/release-notes/en-us/hrcore/8693351.html

Setup required

Configure Optional Fields for Change Job, continued

Additional considerations

- Job Profile.
- Which team will this person be moving to?
- Who will be this person's manager after the move?
- Work Hours Profile.
- Location.

https://doc.workday.com/release-notes/en-us/hrcore/8693351.html

Configure Optional Fields for Change Job, continued

What do I need to do?

From the **Configure Optional Fields** task, select the Change Job functional area.

Configure the fields for your company.

Test your configuration and update your training materials.

What happens if I do nothing?

There's no change to your current Change Job business process.

https://doc.workday.com/release-notes/en-us/hrcore/8693351.html

Job Description Generation on Job Profile

What's changing

With this release, Workday delivers Job Description Generation on Job Profile, enabling you to quickly create job descriptions using generative artificial intelligence.

Workday uses these data points to generate job descriptions:

- Job Profile Name: The name you entered on the job profile.
- Company Name: The name associated with your tenant.
- Preferred Display Language: The user's language.

What do I need to do

Set up security on the new Job Profile: Generate Job Descriptions domain. Access the Innovation Services And Data Selection Opt-In task. On the Innovation Services Opt In tab, select HCM on the Available Services tab and select HCM Machine Learning GA Features.

On the Maintain Innovation Services Data Selection Opt In tab, select HCM:HCM Machine Learning GA Features.

Select the Opt In check box to enable these categories on the HCM:HCM Machine Learning GA Features tab:

- Job Requisition Data.
- Job Posting Data.

Note*: If you're already opted in to either of these categories, you must select the Opt in to Additional Data check box, if available. You may need to wait 24 hours after you opt in for the Generate with AI button to appear.*

https://doc.workday.com/release-notes/en-us/hrcore/8389374.html

Job Description Generation on Job Profile, continued

What happens if I do nothing

You will not be able to create job description on job profiles using generative artificial intelligence.

https://doc.workday.com/release-notes/en-us/hrcore/8389374.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

Configure Additional Address Components

What's changing

You can add new address components by country for all addresses in Workday so that you collect the address data that's relevant to your business. This provides a better user experience and saves time

https://doc.workday.com/release-notes/en-us/hrperson/7677742.html

Configure Additional Address Components, continued

What do I need to do

Before adding address components, consider if delivered integration systems that use these addresses can accommodate additional components. It's important to test relevant integrations to confirm support for the additional address components.

Example: The procurement cXML *Outbound Purchase Order* integration currently supports Address Line 1, Address Line 2, Address Line 3, Address Line 4, City, State, Postal Code, and Country components. Any additional components that you require through this integration will necessitate customization.

What happens if I do nothing

If you do nothing, your current address configuration won't change, but now you can customize how you configure addresses, including Recruiting addresses and addresses for all other functional areas in Workday.

https://doc.workday.com/release-notes/en-us/hrperson/7677742.html

Rescind Manage Job Profile Business Process

What's changing

With this release, Workday enables you to rescind a Manage Job Profile business process event.

What do I need to do

Use the Edit Business Process Security Policy task to configure which unconstrained security groups can use the *Rescind and Rescind (Web Service)* actions for the Manage Job Profile business process.

What happens if I do nothing

Users with access to the Rescind and Rescind (Web Service) action on the Manage Job Profile business process security policy can rescind events.

https://doc.workday.com/release-notes/en-us/hrcore/8380177.html

Setup required

Effective Dating for Service Dates

What's changing

You can now add effective dates to service date changes.

Additional considerations

Workday updates the Production date for this feature to 2025-03-15. This means that the feature remains on the Maintain Feature Opt-Ins report until 2025R1, when Workday will make it automatically available in Production.

This change is in order to provide you with more time to test the feature in Preview. Workday recommends that you review the feature in your Preview tenants. See the related links for more information on how to identify Absence calculation impacts, and make necessary updates.

What do I need to do

To prepare for this feature delivering to Production in 2025R1, Workday requests that customers take the following actions without delay:

- Review the feature in Preview tenants.
- Understand the Absence calculation impacts. Use the Tenant Analyzer report to identify Absence calculation impacts.
- Make necessary configuration changes, and test Absence calculations.

What happens if I do nothing

Once the feature is automatically available in your Production tenant in 2025R1 on 2025-03-15, there might be impacts to your time off accruals calculations. Workday recommends that you test this feature, evaluate any potential impacts, and make corresponding changes prior to 2025-03-15.

https://doc.workday.com/release-notes/en-us/hrcore/6693151.html

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

View Additional Organizations on Org Chart Side Panel

What's changing

With this update you can view matrix and supervisory organizations that workers belong to or manage from a side panel of the org chart.

Additional considerations

Workday updates the Edit Tenant Setup - HCM task with a new Additional Organization View check box in the Always Hide field of the Org Chart section. You can enable this feature by clearing the Additional Organization View check box.

When the check box is cleared, Workday now displays an icon on the worker in the organization chart if the worker is in 1 or more of the following scenarios:

- Manager or member of an active-matrix org.
- Manages more than 1 active supervisory org.
- Has multiple positions.

What do I need to do

Workday recommends that you update your training materials, so workers are aware of these changes.

Access the Edit Tenant Setup - HCM task and clear the Additional Organization View option in the Always Hide field in the Org Chart section. Be sure to check the security set up to prevent workers from seeing Error screens:

All workers have access to at least one position information (security specified above).

There are no restricted organization views as defined by organization visibility.

https://doc.workday.com/release-notes/en-us/org/8368085.html

View Additional Organizations on Org Chart Side Panel, continued

Additional considerations

***Note**: The manager role here is based on the role assignment definition. On the Maintain Assignable Roles task, you can specify the role to be is Leader to grant them the manager role.*

When workers click the icon, Workday displays a side panel with the following information as of the current date:

- A position filter if the worker has multiple positions and the viewing worker has access to the multiple positions.
- Supervisory or Matrix Organizations they manage.
- Supervisory or Matrix Organizations they are a member of.
- The worker's manager in the Member Of section. For organizations with more than 2 managers, Workday abbreviates the number of managers. Example: 3 Managers.
- An icon next to the organization name to guide the viewing worker to the org chart.

What happens if I do nothing

You won't notice any changes in Workday if you don't take action.

https://doc.workday.com/release-notes/en-us/org/8368085.html

View Additional Organizations on Org Chart Side Panel, continued

Additional considerations

***Note**: The term "manager" can be modified or customized using the Maintain Custom Labels task.*

The organizations are listed in this order:

- Matrix Organization.
- Supervisory Organization (Direct assignment).
- Supervisory Organization (Inherited).

To view organization information for a worker's primary position, the viewing worker must have access to these domains:

- Worker Data: Public Worker Reports.
- Self-Service: Current Staffing Information.

https://doc.workday.com/release-notes/en-us/org/8368085.html

View Additional Organizations on Org Chart Side Panel, continued

Additional considerations

To view organization information for a worker's additional position (i.e. not the worker's primary position) the viewing worker must have access to these domains:

- Worker Data: All Positions.
- Worker Position: View.
- Self-Service: Current Staffing Information.

If a viewing worker doesn't have access to additional position domains, they can still see a side panel with the organization information for a worker's primary position, but Workday won't display any additional position information. This mirrors the way workers view information on a worker's worker profile.

If you opt-in to the feature, you will be able to see the supervisory and matrix organizations. No additional organization domain security policy is applied.

https://doc.workday.com/release-notes/en-us/org/8368085.html

View Additional Organizations on Org Chart Side Panel, continued

Additional considerations

Organization visibility configured for individual organizations will still be respected. Example: If organizations are configured to only be seen by certain roles, only the assignees for those roles will be able to see the organizations.

You can give workers the ability to click on the name of an organization to view more details about that organization, and to see an organization icon, by adding workers to these security domains:

- Manage: Supervisory Organization for supervisory organizations.
- Reports: Organizations for matrix organizations.

https://doc.workday.com/release-notes/en-us/org/8368085.html

View Additional Organizations on Org Chart Side Panel, continued

Additional considerations

Limitations

- This feature isn’t available on mobile.
- This feature is only available for organization and position data as of now, Workday do not support the ability to view data as of a past date.

https://doc.workday.com/release-notes/en-us/org/8368085.html

Total Rewards Template Conversion

What's changing

Workday 2025R1 enables you to convert older Total Rewards templates to the new template format, first delivered with Workday 2024R1. Workday also delivers additional features for template configuration.

Additional considerations

Workday delivers the new Convert Total Rewards Template to New Template task (secured to the Set Up: Total Rewards domain). You can now convert total rewards templates created before Workday 2024R1 to the new template format (2024R1 and later).

What do I need to do

You must use the new Convert Total Rewards Template to New Template task to convert pre-2024R1 templates to new templates. You can also use the existing Configure Tenant Branding task to customize the Total Rewards Statement with a logo. All other new functionality is automatically available. After you convert an older template to the new format, you must access the existing Edit Total Rewards Template task to configure the template, including using the new functionality, such as non-currency section groups and icons.

***Note**: Workday plans to retire the pre-2024R1 Total Rewards tasks in a future update:*

- Create Total Rewards Section (Do Not Use).
- Create Total Rewards Template (Do Not Use).
- Edit Total Rewards Section (Do Not Use).
- Edit Total Rewards Template (Do Not Use).

https://doc.workday.com/release-notes/en-us/hrcomp/7976418.html

Total Rewards Template Conversion, continued

Additional considerations

Workday also updates the Create Total Rewards Template task. You can now:

- Configure non-currency section groups that display values without specifying a currency.
- Delete templates and sections.
- Add your company's logo to the Total Rewards Statement using the Configure Tenant Branding task.

Workday also removes the header image. If you configure tenant branding, the image you select displays on the statement. If not, Workday doesn't display an image for the header.

- Include icons on section groups of your Total Rewards Statement.

What happens if I do nothing

Your pre-2024R1 templates remain incompatible with the 2024R1 and later template format.

https://doc.workday.com/release-notes/en-us/hrcomp/7976418.html

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

Minimum Wage in Compensation

What's changing

Workday makes it easier to meet minimum wage requirements for hourly workers. Extending capabilities to use the minimum wage tables delivered by Workday Payroll, you can now configure hourly plans, or mass update existing hourly assignments, using a flat rate (Custom Minimum Wage), minimum wage rates maintained by Workday Payroll (Payroll Authority Minimum Wage), or a calculation (Calculated Minimum Wage).

What do I need to do

To uptake the new functionality:

- Add Compensation Administrators to the new Set Up: Payroll Authority Minimum Wages View domain in the Core Compensation functional area.
- Select a minimum wage type on your hourly plan using the Create or Edit Hourly Plans tasks or the Put Compensation Plan EIB, and decide whether to Enforce Minimum Wage.
- Schedule mass updates to existing hourly plan assignments with the Hourly Plan Assignment Updates for Worker by Position mass operation type on the Mass Operation Management task or update assignments manually using the Request Compensation Change web service.

What happens if I do nothing

Workday works as in previous updates.

https://doc.workday.com/release-notes/en-us/hrcomp/8406795.html

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

Configurable Visibility of Pools and Budget Wheels in Compensation Reviews

What's changing

Workday 2025R1 improves the manager experience by enabling you to hide compensation review pool and budget wheel graphics from target populations of compensation review users.

Additional Considerations

Workday adds this new security domain to enable you to control visibility of pool and budget wheels: View Compensation Review Pool Data in the Advanced Compensation functional area.

Workday also hides pool and budget data from the:

- Compensation Review Budget Pools report.
- Compensation Review Status Report.
- Compensation Review Status Report by Hierarchy.

What do I need to do

Remove security groups from the new security domain in order to hide pool and budget data from those groups.

What happens if I do nothing

Workday assigns security groups with access to view pool data and budget wheels to the new domain to maintain your current access.

https://doc.workday.com/release-notes/en-us/hrcomprev/7931019.html

Individual Target Improved User Interface for Funded Plans

What's changing

Workday 2025R1 makes it more intuitive when assigning compensation plan targets during a compensation change using the enhanced user interface first delivered with Workday 2024R1. You can now select either the plan target or specify a target override for bonus, merit, and stock plans.

Additional considerations

Workday 2025R1 adds the new Plan Target and Specify Target Override options to the Compensation Plan tasklets on these business processes using the enhanced compensation change interface:

- Change Job.
- Hire.
- Request Compensation Change.

Workday automatically defaults the selection to Plan Target, unless there is an Individual Target specified.

What do I need to do

Use the enhanced user interface for these business processes:

- Change Job.
- Hire.
- Request Compensation Change.

What happens if I do nothing

If you don't use the enhanced user interface, you won't see the new feature.

https://doc.workday.com/release-notes/en-us/hrcomp/8727590.html

Individual Target Improved User Interface for Funded Plans, continued

Additional considerations

When you select Plan Target, the Individual Target value remains visible but non-editable. When you select Specify Target Override, you must enter an Individual Target value greater than 0.

If the plan doesn't allow overrides, Workday displays only the Plan Target option.

These new options comply with the Hide Funded Plan Target and Configure Optional Fields features.

https://doc.workday.com/release-notes/en-us/hrcomp/8727590.html

Propose Compensation Hire as Substep of Hire with Enhanced User Interface

What's changing

Workday makes it easier to propose compensation for new hires. Workday now enables you to consolidate the Propose Compensation Hire business process with the Hire business process.

What do I need to do

Access the View Business Process Type for Hire.

Select Business Process > Configure Consolidated Template.

Add Propose Compensation Hire as a Business Process Type.

Add Propose Compensation Hire as a step in the Hire business process

Additional considerations

Workday enables the Propose Compensation Hire business process for use as a step within the Hire business process. With the enhanced user interface for Hire delivered in 2024R2, you can now propose compensation when hiring a new employee.

What happens if I do nothing

You can't include Propose Compensation Hire within the enhanced Hire interface.

https://doc.workday.com/release-notes/en-us/hrcomp/8266101.html

Purge Dependents and Beneficiaries for Active Workers

What's changing

Workday enables you to purge dependent and beneficiary data for active employees.

Additional considerations

With this update, Workday enables you to purge all dependents and beneficiaries for a selected set of active workers with the Purge Person Data task. When you purge this data, Workday removes any references to the person from the tenant. Purging dependents and beneficiaries for active workers cannot be undone. Examples: Workday removes dependent events, Change Beneficiary events, wellness data, and personal information.

Workday adds 1 purgeable data type: Workers Dependents and Beneficiaries.

https://doc.workday.com/release-notes/en-us/hrbendep/8680824.html

Purge Dependents and Beneficiaries for Active Workers, continued

Additional considerations

This feature is available only by request, as purging this data is irreversible and can cause issues if done incorrectly. Contact Workday Support to request that they enable the Workers Dependent and Beneficiary purgeable data type to your tenant.

https://doc.workday.com/release-notes/en-us/hrbendep/8680824.html

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

Benefit Credit Offsets for Workday Payroll

What's changing

Workday enables you to set up benefit credit offsets for Workday payroll.

Additional considerations

Workday delivers these new instance value calculations (IVC) on the View Instance Value Calculation (Workday Owned) report. Use these IVCs in earning and deductions when you want to calculate benefit credits:

Benefits: Total Benefit Credits - Identifies the total number of benefit credits awarded for any combination of benefit group, benefit plan, and benefit coverage type credits associated with an earning or deduction.

Benefits: Benefit Credit Election Offset - Identifies the total number of benefit credits used to offset the cost of an election associated with an earning or deduction.

What do I need to do

Benefits Configuration

Access the Edit Benefit Group task and select a benefit group. On the Benefit Credits tab, select the Enable Remaining Benefit Credits check box.

Set up benefit credits. You can set up benefit credits by:

Accessing the Edit Benefit Plan task and configuring benefit credits to apply to the plan elections.

Accessing the Edit Benefit Group task. On the Benefit Credits tab, configure benefit credits applicable to the group. In the Offset Deductions with Benefit Credits grid, add the coverage types that you want the benefit group and remaining plan credits to offset.

What happens if I do nothing

If you do nothing, Workday will not calculate or display benefit credit offsets for payroll.

https://doc.workday.com/release-notes/en-us/hrbenenroll/8686331.html

Setup required

Benefit Credit Offsets for Workday Payroll, continued

What do I need to do

Payroll Configuration

There are multiple ways you can configure earnings or deductions using the new IVCs depending on your use case.

Example: To pay employees with an earning for their total credits:

Create or edit an earning.

On the Effective Dated tab, add the Benefits: Total Benefit Credits IVC in a calculation. On the Non-Effective Dated tab, configure the associated benefit plans

and group credits that contribute to the credit total.

https://doc.workday.com/release-notes/en-us/hrbenenroll/8686331.html

Benefit Credit Offsets for Workday Payroll, continued

What do I need to do

Example: To reduce employee deductions by the amount of individual credit offsets:

Create or edit a deduction.

On the Effective Dated tab, use the Benefits: Benefit Credit Election Offset IVC to reduce the employee cost. On the Non-Effective Dated tab, associate the benefit plans to which the credit offset applies.

***Note**: Employer deductions could also use the IVC to add to the employer cost.*

Access the Run Pay Calculation task to include the earnings or deductions in a payroll run.

https://doc.workday.com/release-notes/en-us/hrbenenroll/8686331.html

Payroll

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Payroll top features

Automatically available

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- Benefits and Pay Hub Enhancements
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- Pay Anomalies Enhancements

Setup required

- Payroll Input Business Process
- Object Transporter for Payroll
- Payslip Timing
- UK RTI EPS and FPS Reporting
- UK Freeport and Investment Zone Postcode Reporting

Payroll Input Business Process

What's changing

Workday delivers a new Request Payroll Input Event business process, which you can use to submit payroll input requests for review and approval.

Additional considerations

Workday delivers the new Request Payroll Input Event business process, which enables payroll practitioners to request payroll inputs for workers.

You can use the new Request Payroll Inputs task to initiate the business process and to submit multiple payroll input requests at once.

You can configure the new Review Payroll Input Request for Worker task as an allowed action on the business process to route each request event to the reviewer as a My Tasks notification.

What do I need to do

Configure the relevant security groups, such as payroll administrator and payroll partner, on the Request Payroll Input Event business process security policy. Workday recommends adding the:

- Payroll administrator and payroll partner security groups on the Who Can Start the Business Process section for the Request Payroll Inputs initiating action.
- Payroll administrator security group on the Who Can Do Action Steps in the Business Process section for the Review Payroll Input Request for Worker action step.
- Payroll administrator security group on the Who Can Do Actions on Entire Business Process section for the Approve and Deny actions. Payroll administrator and payroll partner security groups on the Who Can Do Actions on Entire Business Process section for the View All actions.

https://doc.workday.com/release-notes/en-us/payexp/8356215.html

Payroll Input Business Process, continued

Additional considerations

Reviewers can also bulk approve some or all pending requests. When you don’t configure the Review Payroll Input Request for Worker task as an allowed action, Workday automatically approves the request.

When you approve a request, Workday adds the payroll input to the worker's payroll calculation. You can view the payroll input event in the worker history. Reviewers can:

- Deny payroll input requests.
- Edit individual requests but not send them back.

What do I need to do

You can configure the business process security policy to allow users to attach files to payroll input requests. See Steps: Enable Attachments on an Individual Business Process.

Edit the business process definition. Ensure you add the Review Payroll Input Request for Worker task as an allowed action.

As a requester, access the Request Payroll Inputs task to submit 1 or more payroll input requests for review.

As a reviewer, access My Tasks to view payroll input requests pending review and approval. You can approve these by accessing each event individually or by using the Bulk Approve task in My Tasks. To approve items in bulk, you must have Modify permission on the Inbox: Business Process Bulk Approval domain security policy in the System functional area. You can review business process activity on the worker history or by accessing the Find Events report.

https://doc.workday.com/release-notes/en-us/payexp/8356215.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

Automatically available

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

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

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

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

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

Object Transporter for Payroll

What's changing

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

Additional considerations

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

- Net Pay Validation and Arrears.
- Pay Component Groups.
- Pay Component Security Segment.
- Pay Groups.
- Run Categories.
- Tax Authority Exceptions Pay Component Groups Tax authority pay component group exceptions won't create new earnings, deductions, or pay component groups that aren't already in the target tenant.

What do I need to do

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

https://doc.workday.com/release-notes/en-us/paywdcore/8245800.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

Payslip Timing

What's changing

Workday can now control the time of day payslips and direct deposit notifications are visible. This is useful when making payments to terminated workers.

Additional considerations

Workday creates the Payslip Visibility Time Override field on the Create Payroll Action Reason and Edit Payroll Action Reason tasks when you select On-Demand Payroll as the Off-Cycle Type. This enables you to configure what time payslips from on-demand payments are visible to workers.

What do I need to do

To configure payslip timing, fill in the Payslip Visibility Time Override field in these tasks:

- Create Payroll Action Reason.
- Edit Payroll Action Reason.

https://doc.workday.com/release-notes/en-us/paywdpymt/8610496.html

UK RTI EPS and FPS Reporting

What's changing

Workday continues to enhance Real Time Information (RTI) reporting.

Additional considerations

From the tax year beginning 2025-04-06, to align with HMRC requirements, Workday made the following updates.

RTI Employer Payment Summary (EPS).

Workday updates the View UK RTI EPS Data report to add data items:

- 215 - Value of SNCP recovered YTD.
- 216 - Value of NIC compensation on SNCP YTD.

In addition, Workday adds data items 215 and 216 to your EPS integration submissions:

- RTI Full Payment Submission (FPS).

What do I need to do

You must have a value in one of these data items:

- 173. Flexible drawdown taxable payment.
- 174. Flexible drawdown non-taxable payment.

If there is no entry in either data item 173 or 174, Workday warns you if you attempt to report on any of these data items:

- 168. Flexibly accessing pension rights.
- 171. Pension Death Benefit.
- 172. Serious ill health lump sum indicator.
- 219. Pension commencement excess lump sum indicator.
- 220. Stand alone lump sum indicator.

Workday warns you in these reports:

- View Advanced UK RTI FPS Exceptions.
- View UK RTI FPS Exceptions.

https://doc.workday.com/release-notes/en-us/paywdgbr/8410707.html

UK RTI EPS and FPS Reporting, continued

Additional considerations

For use in custom reports, Workday delivers new report fields, on the RTI FPS business object, secured to the Process: RTI (Reports) – UK domain. The report fields are:

- 217. Value of Statutory Neonatal Care pay (SNCP) year to date.
- 219. Pension commencement excess lump sum indicator.
- 220. Stand alone lump sum indicator.

In addition, Workday updates these reports to add data items 217, 219, and 220:

- View Advanced UK RTI FPS Data.
- View RTI Data Item Configuration.
- View UK RTI FPS Data.

Workday also adds data items 217, 219, and 220 to your RTI FPS integration submissions.

https://doc.workday.com/release-notes/en-us/paywdgbr/8410707.html

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

UK Freeport and Investment Zone Postcode Reporting

What's changing

From the tax year beginning 2025-04-06, Workday enables you to report the post code of workers who work in Freeport investment zones.

Additional considerations

Workday delivers a new Maintain HR Mapping for UK Payroll task and View HR Mapping for UK Payroll report, enabling you to manage the recording of relevant addresses. The task and report are secured to these domains:

- Set Up: Payroll (RTI) – UK.
- Set Up: Payroll UK.

In addition, Workday updates these reports to add data item 218 - Employee workplace post code:

- View Advanced UK RTI FPS Data.
- View RTI Data Item Configuration.
- View UK RTI FPS Data.

https://doc.workday.com/release-notes/en-us/paywdgbr/8387967.html

UK Freeport and Investment Zone Postcode Reporting, continued

Additional considerations

Workday also adds data item 218 to your RTI FPS integration submissions.

For use in custom reports, Workday delivers a new report field: 218. Employee workplace post code, on the RTI business object, secured to the Process: RTI (Reports) – UK domain.

https://doc.workday.com/release-notes/en-us/paywdgbr/8387967.html

Platform and Product Extensions

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Platform and Product Extensions top features

Automatically available

- Illustration Replacements in Workday Journeys
- Additional Payroll Data on Benefits and Pay Hub
- AWS GovCloud Support for Integration Files
- Supplier E-invoice Generic Connector Updates

Setup required

- Journeys Security to Preview a Journey
- Tasks and Reports in Search
- Onboarding Experience on Workday Home
- Bank Routing Rule Web Services
- Payroll Effective Change Interface Integration
- Worker Effective Change Interface Integration
- WPN - ISO 20022 V9 Credit Transfer Integration Template

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

Journeys Security to Preview a Journey

What's changing

With Workday 2025R1, Workday continues to enhance Journeys Security by delivering 2 new security sub-domains that allow you to restrict access to potentially sensitive information for specific roles.

Additional considerations

Workday introduces 2 new security sub-domains under the Manage: Journey Builders domain:

- Manage: Journey Condition Rules.
- Manage: Journeys Preview.

With this update, users who have access to security domains:

- Manage: Journey Condition Rules can view and edit condition rules.
- Manage: Journeys Preview can preview a journey.

What do I need to do?

Navigate to the Journeys functional area to enable security access. Workday also recommends that you update your training material to note the changes. You can follow these steps:

- Navigate to the Domain Security Policies for Functional Area report and **select Journeys functional** area.
- Navigate to 1 of the new domains, Manage: Journey Condition Rules.
- Open the domain security policy.
- Override parent permissions (it automatically inherits the security groups from Manage: Journey Builders).
- Update the security groups accordingly.
- Remove the inherited security groups and create a new security group.
- Save and activate pending security policy changes.
- Repeat the same steps for Manage: Journeys Preview domain.

https://doc.workday.com/release-notes/en-us/journey/8734997.html

Journeys Security to Preview a Journey, continued

What do I need to do?

Ensure that users added to the security groups for the new domains have access to Manage: Journey Builders domain.

What happens if I do nothing?

You will see no changes in Workday if you don't enable this feature.

https://doc.workday.com/release-notes/en-us/journey/8734997.html

Tasks and Reports in Search

What's changing

Workday improves the search user experience by enabling Workday Assistant to recognize more search queries that return tasks and reports in the search results.

Additional considerations

In the Top Results and the Tasks and Reports category, Workday now uses Workday Assistant to:

- Recognize more search queries that return relevant tasks and reports.
- Rank and display up to 5 of the top tasks and reports specific to a user's search query. The highest ranked search result displays in the Workday Assistant card.

What do I need to do

You must enable the Assistant Innovation Service and opt in to the Task and Report Data data contribution:

- Access the Innovation Services Opt In task.
- Select People Experience: Workday Assistant and click OK.
- Opt in to the Task and Report Data data selection opt in and click OK.
- Click Done.

What happens if I do nothing

If you choose to do nothing, users will not see these enhancements in the search experience.

https://doc.workday.com/release-notes/en-us/pex/8384174.html

Onboarding Experience on Workday Home

What's changing

With the 2025R1 release, Workday continues to enhance the functionality and usability of the Workday Home page by delivering an onboarding experience. Now, your users have access to a new experience on the home page that enables them to see their onboarding plan progress and have quick access to link into the plan.

You also can enable or disable the feature, if needed, on the Home Page Settings tab.

Additional considerations

Workday delivers an onboarding experience on Workday Home page that enables the user to see their current progress in onboarding and displays:

- Onboarding Timeline.
- Onboarding Plan Stage Title.
- Onboarding Plan Stage Names.
- Link to the View Onboarding Plan.

What do I need to do

Configure the onboarding plan and enable the new experience through the Home Page Settings in the Home Page Workspace report.

Workday automatically enables the onboarding experience for you. You can disable Enable Onboarding on the Home Page Settings page.

Workday recommends that you update your training material to note the changes.

What happens if I do nothing

You won't notice any changes in Workday if you don't take action.

https://doc.workday.com/release-notes/en-us/pex/8568957.html

Bank Routing Rule Web Services

What's changing

Workday delivers these new bank routing rule web services (secured to the Set Up: Settlement domain) that you can use to maintain bank routing rules in mass:

- Get Bank Routing Rule.
- Put Bank Routing Rule.

What do I need to do

Grant security access for the new web services.

https://doc.workday.com/release-notes/en-us/finset/8408971.html

Payroll Effective Change Interface Integration

What's changing

Workday continues to improve the Payroll Effective Change Interface (PECI) integration functionality.

Additional considerations

Include Compensation Data Section Integration Attribute

Workday adds a Compensation Change Reason Only (Secondary) option to the Include Compensation Data Section integration attribute that you can select so PECI includes the compensation change reason even when that's the only change.

What do I need to do

To enable integration attributes, open the related actions menu on your integration, select Integration System > Configure Integration Attributes.

https://doc.workday.com/release-notes/en-us/payexternal/8451083.html

Worker Effective Change Interface Integration

What’s changing

Workday continues to improve the Worker Effective Change Interface (WECI) integration functionality.

Additional considerations

Includes Compensation Data Section Integration Attribute.

Workday adds a Compensation Change Reason Only (Secondary) option to the Include Compensation Data Section integration attribute that you can select so WECI includes the compensation change reason even when that's the only change.

Includes Position Data Section Integration Attribute.

Workday adds a new Job Change Reason Only (Secondary) option on the Include Position Data Section integration attribute that you can select so WECI includes the job change reason even when that's the only change.

What do I need to do

To enable integration attributes, open the related actions menu on your integration, select Integration System > Configure Integration Attributes.

https://doc.workday.com/release-notes/en-us/payexternal/8758072.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

WPN - ISO 20022 V9 Credit Transfer Integration Template

What's changing

Workday delivers a new WPN - ISO 20022 V9 Credit Transfer integration template to support version 9 (pain.001.001.09) global payment processing.

Additional considerations

Workday delivers a new WPN - ISO 20022 V9 Credit Transfer integration template that you can use to send outbound payments in version 9 format to global banks.

The template is secured to these domains:

- Integration Event.
- Process: Settlement.

This template provides support for the new Legal Entity Identifier field used to identify the company initiating the payment.

Workday adds a new Dbtr Legal Entity Identifier (LEI) map on the integration template to support the new field.

What do I need to do

Create an integration system with the new template using the Create Integration System task. See Create Integration System.

https://doc.workday.com/release-notes/en-us/finint/8423480.html

WPN - ISO 20022 V9 Credit Transfer Integration Template, continued

Additional considerations

Workday updates these existing maps on the template to now support multiple map values:

- CountryToClrChanl.
- Override CountryToClrChanl by Payment Type.

Workday also updates these tags in the payment file to support the version 9 format requirements:

- BIC to BICFI.
- ISODate to ISODateTime.

https://doc.workday.com/release-notes/en-us/finint/8423480.html

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

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

Student - Advising

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Student top features

Automatically available

- Role-Based Security for Student Cohorts
- Academic Progress Evaluation for Future Effective-dated Programs of Study

Setup required

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

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

Student - Records

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Student top features

Automatically available

- Inheritance for Academic Policies
- Registration Troubleshooting Console Report
- Course Versions for Student Registration Management
- Roll Over Academic Period Registration Appointments
- Course Waitlist Policy Configurations

Setup required

- Tentative Grade Reporting
- Custom Help Text on Registration Waitlist Availability Business Process

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

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

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

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

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

Tentative Grade Reporting

What's changing

With this release, you can report on saved grades that haven't been submitted.

Additional considerations

Workday delivers new Has Unsubmitted Grades report fields on the Course Section Definition and Student Course Registration business objects (secured to the Public Reporting Items domain), enabling you to report on registrations with tentative grades.
Also, workday renames buttons in the Assign Student Grades for Student Course Section task to reduce confusion, from:

- Submit to Continue.
- OK to Submit, on the confirmation page.

What do I need to do

Configure your custom reports to use the new report fields.

https://doc.workday.com/release-notes/en-us/sturec/8271877.html

Setup required

Custom Help Text on Registration Waitlist Availability Business Process

What's changing

Workday now displays custom help text instead of Workday-delivered help text when you configure them on the Confirm Waitlist Advancement step on the Registration Waitlist Availability Event business process. Students can now view your custom help text when:

- They confirm their waitlist advancement.
- The business processes expires.
- They have a hold preventing them from registering for courses.

What do I need to do

To display custom help text to students on the Registration Waitlist Availability Event business process:

Add Configure Waitlist Advancement as a step on the business process.

From the related actions menu of that step, select Business Process > Maintain Step Help-Text.

What happens if I do nothing

Workday continues to display the Workday-delivered help text to students when they view the Registration Waitlist Availability Event business process.

https://doc.workday.com/release-notes/en-us/stureg/8742384.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

Student – Financial Aid

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Student Financial Aid top features

Automatically available

- Freeze Load Status for Financial Aid
- Filter Active Students on the Run Student Financial Services Processes by Student Report
- Institutional Student Information Records (ISIRs)
- Master Promissory Notes (MPNs)
- PLUS Loans: Relationship to Student Field
- Alternative Loan Processing and Matching Logic
- Action Items: Added Flexibility with Assigning Holds for Business Processes

Setup required

- Pell Cost of Attendance (COA) Logic
- Return Order for Title IV Awards
- Custom Dates and Breaks for Return of Title IV

Automatically Available

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. Workday also updates 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

Pell Cost of Attendance (COA) Logic

What's changing

Workday now enables you to include cost items in a student's Pell COA that aren't eligible for Title IV COA based on the student's enrollment intensity and load status.

Additional considerations

With this release, Workday provides the ability to include cost items in a student's Pell COA calculation that aren't included in the first academic period of the award year due to the student being enrolled less than half-time.

Create Student Cost Item Task

On the Create Student Cost Item task, Workday:

- Delivers a new Pell Cost Eligibility Override prompt, enabling you to create eligibility conditions for a cost item to be included in the Pell COA when the cost item isn't eligible to be included based on cost item assignment conditions. Workday also adds hover text providing you with more information about creating eligibility conditions.

https://doc.workday.com/release-notes/en-us/stufad/8163890.html

Pell Cost of Attendance (COA) Logic, continued

Additional considerations

Workday updates these web services to support the new Pell COA logic:

- Get Student Cost Item
- Put Student Cost Item
- Student Self-Service Tasks

Workday no longer includes ineligible student cost items on these Student Self-Service tasks:

- Review Financial Aid
- View Estimated Costs
- View Financial Aid
- View Financial Aid as Third Party
- Add hover text to the Less-Than-Half-Time Pell Cost check box to describe the functionality.

https://doc.workday.com/release-notes/en-us/stufad/8163890.html

Pell Cost of Attendance (COA) Logic, continued

Additional considerations

Report Columns

For award years 2024-2025 and later, Workday delivers these new columns:

- Cost Eligibility on these reports: Edit Cost of Attendance.
- View Cost of Attendance (History and Summary).

Pell Cost Eligibility Override on these reports:

- Edit Pell Cost of Attendance.
- View Pell Cost of Attendance.

Workday also adds hover text to these new columns, providing information about the displayed values.

https://doc.workday.com/release-notes/en-us/stufad/8163890.html

Pell Cost of Attendance (COA) Logic, continued

What do I need to do

Review student cost items to determine if any should be excluded from the student's COA, but should remain in the student's Pell COA. Example: The student cost item is excluded from the COA because the student is enrolled less than half-time, but the cost item is still needed to calculate Pell COA.

To add the Pell Eligibility Override to the student cost item:

- Access the Edit Student Cost Item task.
- From the Pell Cost Eligibility Override prompt, select an eligibility calculation.
- Access the Maintain Student Cost Item Assignment task and review the If conditions.

The student will be evaluated for the Pell Cost Eligibility Override eligibility calculation only if they fail the If condition associated with the student cost item on the Maintain Student Cost Item Assignment task.

What happens if I do nothing

Cost items that aren't included on the student's Title IV COA won't be included on the student's Pell COA.

https://doc.workday.com/release-notes/en-us/stufad/8163890.html

PLUS Loans: Relationship to Student Field, continued

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

Setup required

Return Order for Title IV Awards

What’s changing

With this release, Workday enables you to define the order in which Workday processes awards for Return of Title IV (R2T4) in a given award year.

Additional considerations

Maintain Return of Title IV Configuration

Workday delivers a new Maintain Return of Title IV Configuration task (secured to the Manage: Return of Title IV Processing - USA domain) that you can use to specify the order in which to return federal loans and grants for an award year.

Workday also delivers a new View Return of Title IV Configuration report (secured to the Manage: Return of Title IV Processing - USA domain) that you can use to view the return order for a given academic unit and award year.

https://doc.workday.com/release-notes/en-us/stufad/8292180.html

Return Order for Title IV Awards, continued

Additional considerations

Return of Title IV Configuration Web Services

Workday delivers these new web services (secured to the Manage: Return of Title IV Processing - USA domain) that you can use to create, update, or retrieve R2T4 configurations:

- Get Return of Title IV Configurations
- Put Return of Title IV Configuration

https://doc.workday.com/release-notes/en-us/stufad/8292180.html

Return Order for Title IV Awards, continued

What do I need to do

Complete the Maintain Return of Title IV Configuration task for each award year to ensure your return order meets ED requirements for that year.

What happens if I do nothing

For 2024-2025 award year R2T4 worksheets, Workday returns federal loans and grants in the order specified by ED.

https://doc.workday.com/release-notes/en-us/stufad/8292180.html

Custom Dates and Breaks for Return of Title IV

What's changing

With this release, Workday enables you to use custom start and end dates for academic periods and break day date ranges when calculating Return of Title IV for a student.

Additional considerations

Maintain Return of Title IV Worksheet

For clarity, Workday renames the Create Return of Title IV Worksheet task to Maintain Return of Title IV Worksheet. On the Percentage Earned tab, Workday renames these options:

- Calculate Using Withdrawal Date to Use Program of Study Dates and Breaks.
- Calculate Manually to Manually Enter Percentage Earned.

To give you greater insight into the elements used in the R2T4 calculation, Workday now displays the Start Date and End Date of the of the academic period for the calculation.

https://doc.workday.com/release-notes/en-us/stufad/8275392.html

Custom Dates and Breaks for Return of Title IV, continued

Additional considerations

Workday also adds a new Override Program of Study Dates and Breaks option. When you select the new option, Workday enables you to:

- Edit the Start Date and End Date of the academic period for the calculation.
- Add custom breaks on the Break Day Date Ranges Used in Calculation grid.

Report Fields

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

- Program of Study Start Date Override.
- Program of Study End Date Override.
- Program of Study Dates and Breaks Override Exists
- Manually Entered Percentage Earned Exists.

https://doc.workday.com/release-notes/en-us/stufad/8275392.html

Custom Dates and Breaks for Return of Title IV, continued

What do I need to do

Add the new report fields to your custom reports.

What happens if I do nothing

The new options will display on the Maintain Return of Title IV Worksheet task.

https://doc.workday.com/release-notes/en-us/stufad/8275392.html

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, Workday delivers 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

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, Workday matchs 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 Workday fully retires it in September 2026.

https://doc.workday.com/release-notes/en-us/stufad/8426423.html

Student – Core

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Student Core top features

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- Course Section Capacity
- Find Courses and Course Sections
- Dates and Times on Sent Engagement Items
- Hide Military Details on Student Profile
- UDMF Reporting for Workday Student
- Duplicate Management for Student Onboarding Events

Setup required

- Campus Engagement Hub Enhancements
- Object Transporter for Campus Engagement
- Military Service Information for Workday Student
- Object Transporter for Student Core

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

Campus Engagement Hub Enhancements

What's changing

Workday provides enhancements to the Email Analytics report and individual cards on the Campus Engagement Hub.

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

Additional considerations

Workday updates the first column of the Email Analytics report on the Campus Engagement Hub to include engagement plans. Workday also updates the second column to display the engagement items in the plan of the first column.

Workday also updates the Email Analytics report on the Campus Engagement Hub to enable users to drill into engagement items to view:

- Each recipient.
- The academic units and programs of study of the recipients.
- The content of the engagement item.

https://doc.workday.com/release-notes/en-us/stueng/8271533.html

Campus Engagement Hub Enhancements, continued

Additional considerations

Drilling into engagement items also enables you to see which recipients:

- Received the engagement item.
- Opened the engagement item.
- Clicked on content within the engagement item.
- Unsubscribed from further communications.

Workday also rename the Most Recent Engagement Plan Runs card to Most Recent Engagement Runs. In addition to the engagement runs scheduled using the Schedule Campus Engagement Run task, Workday now also includes runs scheduled from the plan directly on both this card and the Upcoming Scheduled Engagement Runs card.

https://doc.workday.com/release-notes/en-us/stueng/8271533.html

Campus Engagement Hub Enhancements, continued

What do I need to do

You might need to take additional steps to enable features related to Email Analytics based on your organization's subscription service agreement. To determine your subscription service agreement:

- Select your profile avatar on Community.
- Select Profile.
- On your profile page, select your organization's name, which is beneath your name and next to your job title.
- View your Subscription Service Agreement value.

If the value is:

- MSA, you must enable this feature through Innovation Services.
- UMSA, this feature is automatically available.

https://doc.workday.com/release-notes/en-us/stueng/8271533.html

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

Object Transporter for Campus Engagement

What's changing

With this release, Workday enables you to migrate Campus Engagement objects using Object Transporter.

Additional considerations

With this update, Workday enables you to migrate these Campus Engagement objects between tenants using Object Transporter:

- Engagement Category Security Segments.
- Student Audiences.
- Student Cohorts.
- Student Cohort Collections.
- Student Cohort Types.
- Student Engagement Plans.
- Student Messages.
- Student Note Categories and Topics.

What do I need to do

To migrate objects and configuration packages, you need access to:

- Customer Central.
- Object Transporter.

https://doc.workday.com/release-notes/en-us/stueng/8541541.html

Object Transporter for Campus Engagement, continued

Additional considerations

Student Note Security Segments.

Student Printed Items.

Student Printed Item Print Layouts.

https://doc.workday.com/release-notes/en-us/stueng/8541541.html

Military Service Information for Workday Student

What's changing

With this release, Workday adds military service grids to the Military Details profile group of the student profile.

Additional considerations

Workday delivers a Military Service grid on the Military Details profile group of the student profile.

Workday also adds a new Military Service Documents grid on the Military Details profile group of the student profile, enabling you to view students' military documents at a glance.

What do I need to do

To upload documents related to students' military service, you need to configure document types under the Military Service (Student) category using the Maintain Student Document Types task.

What happens if I do nothing

If you don't configure document types for the Military Service (Student) category, you won't be able to upload, or associate documents related to a student's military service

https://doc.workday.com/release-notes/en-us/stucore/8368643.html

Military Service Information for Workday Student, continued

Additional considerations

To view the Military Service Documents grid, users need access to these domains:

- Person Data: Military Status.
- Student Data: Military Details.
- Student Data: Student Profile.

Users also need access to either of these domains:

- Manage: Add Student Documents.
- Manage: Edit Student Documents.

Workday also delivers the new Military Service (Student) student document category.
These web services now prevent you from adding documents in the Military Service (Student) category to students without a military relationship:

- Add Student Document.
- Edit Student Document.

https://doc.workday.com/release-notes/en-us/stucore/8368643.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

Object Transporter for Student Core

What's changing

With this release, Workday enables you to migrate Student Core objects using Object Transporter.

Additional considerations

With this update, Workday enables you to migrate these Student Core objects between tenants using Object Transporter:

- Athletic Roles.
- Athletic Statuses.
- Athletic Teams.
- Evaluate Student Residency Service Configurations.

What do I need to do

To migrate objects and configuration packages, you need access to:

- Customer Central.
- Object Transporter.

https://doc.workday.com/release-notes/en-us/stucore/8689432.html

Object Transporter for Student Core, continued

Additional considerations

- Remove Student Hold Reason Service Configurations.
- Residency Reasons.
- Residency Calculation Mappings.
- Remove Student Hold Reason Service Configurations.
- Residency Reasons.
- Residency Calculation Mappings.
- Student Document Types.
- Student Hold Reasons.
- Student Hold Reason Security Segments.
- Student Housing Assignment Statuses.
- Student Immigration Sponsorship Statuses.
- Student Immigration Statuses.
- Student Immigration Statuses.

https://doc.workday.com/release-notes/en-us/stucore/8689432.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 – Recruiting & Admissions

Back to table of contents

Student Recruiting & Admissions top features

Automatically available

- Transfer Credit Evaluation
- Educational Institution Course Web Services

Setup required

- Delay Student External Account Creation
- Transfer Credit Rules

Delay Student External Account Creation

What's changing

With this update, Workday enables you to delay external student site account creation for applicants to Fast Path programs of study. Workday also provides more configuration options for step delays and condition rules for creating external student site accounts on the Create Student External Account and Publish Application Grouping business processes.

Additional considerations

Workday now delays creating external student site accounts for applicants to Fast Path programs of study that have been flagged for application review when you use the Maintain Delay Student External Account Creation Policy task to configure delays for those programs of study or the academic unit and level that contain those programs of study.

What do I need to do

On the Maintain Delay Student External Account Creation Policy task, configure policies for Fast Path programs of study or academic units and academic levels that contain Fast Path programs of study.

On the Student Application Fast Path Event business process, add a Flag for Fast Path Application Review service step after the Reconcile Student Applicant step.

Create condition rules for the Create Student External Account business process that use report fields on the Student Application business object.

Create step delays for the Publish Application Grouping business process that use report fields on the Application Grouping business object.

https://doc.workday.com/release-notes/en-us/stups/8396665.html

Delay Student External Account Creation, continued

Additional considerations

You can now use report fields on the Student Application business object in condition rules on the Create Student External Account business process. This enables you to create accounts only for populations that will use the external student site before matriculation.

You can now create step delays for the Publish Application Grouping business process that postpone the Create External Account for Student Applications service, or any other step, based on report fields on the Application Grouping business object. Example: You're currently preparing to admit students for Fall 2025 while continuing to admit students for Summer 2025. You want to delay creating accounts for students who are starting in Fall 2025 until their financial aid awards are available and create accounts immediately for students who are starting in Summer 2025.

What happens if I do nothing

If any existing delay student external account creation policies include Fast Path programs of study, and the Student Application Fast Path Event business process is configured to flag Fast Path applications for review, Workday now delays account creation for applicants to those programs of study. If you intend to delay account creation, Workday recommends that you review your configurations and verify that your setup is working as expected.

The Create Student External Account and Publish Application Grouping business processes will run as they do today.

https://doc.workday.com/release-notes/en-us/stups/8396665.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

Transfer Credit Rules

What's changing

Workday now enables you to specify the unit type for minimum units on each version of transfer credit rules for educational institutions.

Additional considerations

Workday updates these tasks and report for when you specify the minimum units on educational institution transfer credit rules:

- Create Transfer Credit Rule.
- Edit Transfer Credit Rule .

For rules with a minimum units value that's more than 0, Workday now:

- Removes the Preferred Unit Type field.
- Displays a new Unit Type field in the Minimum Units column of the grid.

For your existing transfer credit rules that specify minimum units, Workday delivers a conversion to populate the Unit Type on all rule versions with the value from the Preferred Unit Type field.

What do I need to do

Update these web services to v44.0 or later:

- Get Student Transfer Credit Rules.
- Put Student Transfer Credit Rule.

Update your custom reports to use the new Unit Type for Minimum Units report field.

https://doc.workday.com/release-notes/en-us/stuops/8111341.html

Transfer Credit Rules, continued

Additional considerations

Workday updates these web services and reports to support the unit type for minimum units on each version of the educational institution transfer credit rule:

- Get Student Transfer Credit Rules.
- Put Student Transfer Credit Rule.

Note: To use this functionality, you must update the web services to v44.0 or later.

Workday also update tasks and reports for:

- Managing and viewing transfer credit rules.
- Initiating transfer credit evaluations.
- Troubleshooting consoles for transfer credit.

Workday delivers a new Unit Type for Minimum Units report field on the Transfer Credit Rule Version business object (secured to the Reports: Transfer Credit domain) that you can use in custom reports. This report field replaces the Preferred Unit Type report field on the Transfer Credit Rule business object. Workday plans to retire this report field in a future release.

https://doc.workday.com/release-notes/en-us/stuops/8111341.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 – Financial

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Student Recruiting & Admissions top features

Automatically available

- New Student Waiver Experience
- Student Payment Precedence Charge Item Selection
- Cancel Charges for Academic Period
- Student Financials Policy Management

Setup required

- Student Financials Refresh Account
- Override Display ID for Student Worktag

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 Refresh Account

What’s changing

Workday continues to enable:

- Students, proxies, and administrators to Refresh the student's account with current charges and waivers.
- Administrators to see financial account statuses on specific reports and views.

Workday limits some processing functions during peak processing periods for better tenant performance.

Additional considerations

- Maintain Institutional Student Financial Options Task:
  Workday adds these grouping options to the Refresh Account Options section of the Maintain Institutional Student Financial Options task enabling you to now select which group can see and use the refresh options:
  - Admin Only.
  - Student/Proxy Only.

https://doc.workday.com/release-notes/en-us/stufin/7734260.html

Student Financials Refresh Account, continued

Additional considerations

- All of the above.
- None of the Above.

Workday also adds the new Refresh Button Help Text or Students and Proxies option to the Refresh Account Options section enabling you to add custom help text under the refresh button to clarify what the statuses and refresh button covers.
When you’ve selected an account refresh button check box that includes Students and Proxies and the student account is out of date, your custom help text displays for students and proxies on these tasks and report:

- Make a Payment.
- Make a Payment as Third Party.
- Manage My Privacy Settings.
- Sign up for Payment Plan.
- View Account Activity.

https://doc.workday.com/release-notes/en-us/stufin/7734260.html

Student Financials Refresh Account, continued

Additional considerations

Sign Up for a Payment Plan Task:

- Workday adds the Account Refresh button and Account Not Up To Date status to the Sign Up for a Payment Plan task enabling students to have more accurate account information available when signing themselves up for payment plans.

https://doc.workday.com/release-notes/en-us/stufin/7734260.html

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, Workday:

- Renames the Exclusion field to Charge Item Exclusion.
- Adds a new Charge Item Inclusion field.
- No longer requires an entry in the Charge Type field. You can now enter a Charge Type, a Charge Item Inclusion, or both.
- Now only enables you to select options in the Charge Item Exclusion field that match Charge Items of the selected Charge Type.
- Updates the precedence line logic to now only apply excluded items to that specific Charge Type row.

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, Workday also adds 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.

Workday converts 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, Workday:

- Renames the Exclusion field to Charge Item Exclusion.
- Adds a new Charge Item Inclusion field.

On the Put Student Precedence Group Rule Set web service, Workday also:

- No longer requires an entry in the Charge Type field.
- You can now specify a Charge Type, a Charge Item Inclusion, or both.

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

Automatically available

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

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

Override Display ID for Student Worktag

What's changing

Workday Student enables you to now identify a student by their student ID when viewing worktags in transactions.

Additional considerations

Workday adds the new Override Display ID for Student Worktag option and these check boxes to the Tenant Options section of the Edit Tenant Setup - Student task, enabling you to override the information that displays on your student transactional worktags:

- Append ID to Student Name.
- ID Only.
- None of the above.

NOTE*: When you choose to override the display ID for student worktags, Workday applies your choice to prior and future transactions.*

https://doc.workday.com/release-notes/en-us/stufin/6324241.html

Talent Management

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Talent Management top features

Automatically available

- Hide Inactive Learning Content from Global Search
- AI Summarization of Content Feedback
- Surveys Migration
- Email Validation for External Learning Users

Setup required

- New Workday Onboarding Experience
- Non-US English Locales on External Career Sites
- Multiple Language Search for Job Description and Job Posting Title
- Learning Recommendations in Preferred Language
- Engagement Builder

New Workday Onboarding Experience

What's changing

Workday enhances the onboarding experience, enabling you to send personalized and engaging content to new hires at defined stages of their onboarding period.

This new functionality allows you to send targeted preboarding content to candidates as soon as they receive an offer or employment agreement, bridging the gap until they receive access to Workday.

After receiving their Workday account, you can continue to connect with your new hires and share the information they need to prepare for their role even before Day 1. With their Workday account, they can log in and complete any compliance tasks in their Onboarding Plan, ensuring HR has all the necessary details for a smooth setup.

What do I need to do

Prerequisites for External Preboarding (Recruiting customers only).

External Preboarding relies on the use of an External Career Site. (Recruiting customers only).

Use 1 or all these business processes:

- Hire.
- Contract Contingent Worker.
- Employment Agreement (Recruiting customers only).
- Offer (Recruiting customers only).

Enable these functional areas:

- Onboarding.
- Recruiting (Recruiting customers only).
- Messaging (Messaging customers only).

To use Video you might need to Opt-In to Workday Media Cloud and sign the Workday Media Cloud Agreement.

https://doc.workday.com/release-notes/en-us/onb/8133451.html

New Workday Onboarding Experience, continued

Additional considerations

Security Domains:

Workday adds these new security domains in the Onboarding functional area:

- Manage: Onboarding Audience Condition Rules: Enables you to manage condition rules for audiences for Onboarding Plans.
- View: Onboarding Plans Preview: Enable you to preview the configuration of Onboarding Plan details for a person or Plan Assignment.

Onboarding Plan

You can now assign your new hires an Onboarding Plan that contains all of the content they need throughout their onboarding period. A new hire can access their Onboarding Plan:

What do I need to do

Security

Administrator access to the Onboarding Planner:

- Grant Modify permission to the appropriate security groups on the domain Set Up: Onboarding.

Pre-Hire access to the External Preboarding site:

- Grant Modify permission to the security group External Pre-Hire as Self access on the domain Self Service: Onboarding. [Recruiting customers only]

Pre-Employee access to Onboarding Plans internally before day one:

- Grant Modify permission to the security group Pre-Employee as Self (and Pre-Contingent Worker as Self) on the domain Self Service: Onboarding.

https://doc.workday.com/release-notes/en-us/onb/8133451.html

Setup required

New Workday Onboarding Experience, continued

Additional considerations

Externally: Through the new External Preboarding site, bridging the engagement gap while the new joiner only has access through their Candidate Home account. (Recruiting customers only).

Internally: Within the tenant after receiving their Workday account credentials. (All HCM customers).

Note*: Once the new hire logs into their Workday account in Production for the first time, they will no longer access their Onboarding Plan through the External Preboarding site. Instead, when accessing the External Preboarding site, they will be directed to their Onboarding experience within the tenant.*

Admin Experience: Onboarding Planner

The Onboarding Planner gives you a centralized hub to configure Onboarding with improved visibility. It allows you to create time-based stages aligned with the Hire

What do I need to do

Employee access to Onboarding Plans internally from day one:

Grant Modify permission to the security group Employee As Self (and Contingent Worker As Self) on the domain Self Service: Onboarding

Configure security policy for the Worker Data: Onboarding domain to access reports.

Condition Rule configuration: Grant access to domain Manage: Onboarding Audience Condition Rules to enable users to manage condition rules for audiences for Onboarding Plans.

Onboarding Plan Configuration Preview: Grant access to domain View: Onboarding Plans Preview to enable users to preview configuration of Onboarding Plan details for a person or Plan Assignment.

https://doc.workday.com/release-notes/en-us/onb/8133451.html

New Workday Onboarding Experience, continued

Additional considerations

Date, helping you group and deliver unique content to new hires in manageable stages, reducing overload. The Onboarding Planner also includes reporting tools to help you monitor plan assignments to maintain oversight, and a location to configure branding for the External Preboarding site.

Report Fields

Workday delivers new report fields that you can use in condition rules and custom reports. (See the attached file for a full list of all new report fields and their business objects)

Report Data Sources

Workday delivers these new Report Data Sources (RDS) that you can use to create custom reports for onboarding:

- Onboarding Plan Assignments (secured to the Worker Data: Onboarding domain).
- Onboarding Advisories (secured to the Set Up: Onboarding domain).

What do I need to do

Onboarding Plan Assignment Service

To configure when Onboarding Plans are available to onboarding hires, you can setup Onboarding Plan Assignment as a step on these business processes:

- Contract Contingent Worker
- Employment Agreement (Recruiting customers only)
- Hire
- Offer (Recruiting customers only)

When a new hire reaches the stage with a configured Onboarding Plan Assignment, step they're immediately:

- Assigned their Onboarding Plan Assignment.
- Placed into the most recent eligible stage you have configured.
- Receive any eligible notifications configured for that stage.

https://doc.workday.com/release-notes/en-us/onb/8133451.html

New Workday Onboarding Experience, continued

Additional considerations

Workday Delivered Reports

Onboarding Plan Assignments: You can use this report to get an overview of onboarding plan assignment details for workers or pre-hires assigned the plan.

Onboarding Advisories: You can use this report to help you address potential issues during the onboarding process, such as any new worker or pre-hire that may be missing an onboarding plan assignment.

Onboarding Plan Assignment Service Step

Workday adds the new Onboarding Plan Assignment service step that you can add to these business processes to establish the starting point, point from which an Onboarding Plan can be made available to new hires:

- Hire.
- Contract Contingent Worker.
- Employment Agreement (Recruiting customers only).
- Offer (Recruiting customers only).

What do I need to do

***Note**: An onboarding user can have one active plan assigned at a time. When you assign a plan to a new hire through the service, they'll gain access to the plan as soon as they reach the first configured stage.*

Onboarding Plan Stage Assignment

Once you assign the plan, Workday places the new hire:

- In a stage based on the stage offset configured in the Onboarding Planner relative to the (proposed) Hire Date.
- In their most eligible stage and sends notifications for that stage. Workday also inactivates plan assignments as needed.
- A background process runs once an hour, across all plan assignments.

https://doc.workday.com/release-notes/en-us/onb/8133451.html

New Workday Onboarding Experience, continued

Additional considerations

Onboarding Timeline

Workday adds the Onboarding Timeline to provide new hires with a visual representation of their current stage in the onboarding process. The content dynamically updates as new hires progress through each stage based on plan configuration. If you have an active plan assignment, the Onboarding Timeline is visible on the:

- Workday Homepage (Access point to Onboarding Plan).
- Onboarding Plan.

Onboarding Tasks

Workday delivers these new tasks that you can use with the new onboarding experience. See attachment for full list.

What do I need to do

Set Up Onboarding Planner

Access the Onboarding Planner task and configure these sections:

Planner Section - Overview: You can use the Maintain Hubs task to personalize the landing page with:

- Custom Reports.
- Announcements.
- External Links.

Planner Section - Audiences: Access the Maintain Onboarding Plan Audiences task to assign plans to audiences and set the plan hierarchy.

You can create Audiences using condition rules to send personalized Onboarding Plans and individualized content to groups of new starters based on set criteria. Example: Region or Job Area.

https://doc.workday.com/release-notes/en-us/onb/8133451.html

New Workday Onboarding Experience, continued

Additional considerations

Onboarding Purge

You can use the new report field Has Active Onboarding Plan Assignment (secured to the Purge Person Data domain) to purge personal identifiable information for candidates or job applications with active onboarding plan assignments. After you purge a candidate or job application, Workday inactivates the associated Plan Assignment.

Tenant Setup Check Box

Workday adds a new Disable Onboarding Dashboard check box on the Edit Tenant Setup - HCM task.

Two of the Onboarding tasks used to access the existing Onboarding Dashboard and Onboarding Plans (from global search or homepage menu items) are conditional and impacted by the Disable Onboarding Dashboard check box.

What do I need to do

Maintain Audiences: You can create Audiences that you can use at both Plan and content level for more granularity. You can create and select the rules from the Condition Rules prompt:

Job Application Condition Rules: Created to target new joiner access content as pre-hires through the External Preboarding site (Recruiting customer only)

Worker Condition Rules: Created for new joiners accessing content as Workers or contingent workers internally once they receive a Workday account.

Plan Audience Selection: You can assign Audiences to an Onboarding Plan.

Note*: If you're using both External Preboarding and the internal experience, configure audience rules for both job application and worker to ensure new hires retain access to content when they become workers. Once a worker exists, only Worker audience condition rules are used and Job Application rules are ignored. (Recruiting customers only)*

https://doc.workday.com/release-notes/en-us/onb/8133451.html

New Workday Onboarding Experience, continued

Additional considerations

For these two tasks, when you leave the Disable Onboarding Dashboard checkbox unselected, Workday directs users with an active Onboarding Plan Assignment to the new Onboarding Plan homepage. Users without an assignment will continue to see the existing Onboarding Dashboard.

When you select the Disable Onboarding Dashboard checkbox, Workday directs all users to the new Onboarding Plan homepage.

This supports customers using the existing Onboarding Dashboard, allowing new hires with ongoing dashboard content to complete their onboarding through a single experience. The check box enables you to manage your migration to the new Onboarding Plan when you're ready for your entire onboarding population to transition to the new experience.

What do I need to do

Planner Section - Content Library: You can use the Create Onboarding Content task to create specific content for Onboarding Plans.

Onboarding Announcement: You can create an Announcement to include in an Onboarding Plan. Note: Custom Reports and Tasks will not display in External Preboarding even when configured. Worker photos will display to external users with access to the Person Data: Personal Photo domain. (Recruiting customers only)

***Note**: You can use the new task Copy Onboarding Dashboard Announcements to Onboarding Plan Announcements to select and copy existing Announcements that you have configured in the Onboarding Dashboard.*

Onboarding Card: You can create a Day 1 Overview Card and add it to a plan providing the new joiner with the key information they need in advance of their first day. You can include these details on the Day 1 Overview Card:

https://doc.workday.com/release-notes/en-us/onb/8133451.html

New Workday Onboarding Experience, continued

What do I need to do

- Work Location
- First Day Start Time.
- Orientation Location.
- Orientation Start Time.
- Instruction Overview.
- Orientation Facilitator.

You can use Audience and Condition Rules to localize the content on the Day 1 Overview Card.

You can also manually enter values for each field or use a dynamic External Field. You can also configure a custom object for Job Application or Worker to manage these values.

You can also create Calculated Fields to get specific information from business objects. Example: Job Application.

https://doc.workday.com/release-notes/en-us/onb/8133451.html

New Workday Onboarding Experience, continued

What do I need to do

Create Onboarding Message: You can create a Message that will default to a Highlight when configuring an Onboarding Plan. This can be a welcome message, a message providing context on the organization or their new role.

Create Onboarding Video: You can create a Video that you can add to the You might be interested in a slider on the Onboarding Plan or as a Highlight.

Planner Section- Notifications: You can set up notifications for each stage to let new hires know when new content is available.

Access the Edit Tenant Setup-Notifications task to configure routing rules for the notifications. Enter Onboarding Plan Notifications under HCM for Email or SMS (Workday Messaging customers only)

https://doc.workday.com/release-notes/en-us/onb/8133451.html

New Workday Onboarding Experience, continued

What do I need to do

Create and publish a Notification Template for Email notifications from Drive using the Onboarding Plan Notifications category. You can use Notification Templates in Notification Designer to customize Email notification with your organization's branding.

You can link the new hire to their Onboarding Plan using any of these report fields:

- External Onboarding Plan URL.
- External Onboarding Plan Day 1 Overview.

You can use the new report fields to personalize notifications for both email and SMS, reducing the need to create multiple notifications.

You can report on notifications using the Notification Events for Onboarding Plan Assignment report field.

https://doc.workday.com/release-notes/en-us/onb/8133451.html

New Workday Onboarding Experience, continued

What do I need to do

Planner Section - External Branding:

- You can use the Create/Edit External Onboarding Brand task to upload your logo and banner for consistent branding for your Onboarding Plan. Once the new hire has tenant access, they will see tenant branding, which may differ from External Branding.

Planner Section - Reports:

- Onboarding Business Process Status Summary: Enables you to track the summary of recently hired workers' task completion status from the onboarding business process.

Onboarding Plan Assignments: Enables you to get an overview on onboarding plan assignment details for any worker or pre-hire assigned the plan.

Onboarding Advisories: Helps you identify workers that may be missing a plan assignment.

https://doc.workday.com/release-notes/en-us/onb/8133451.html

New Workday Onboarding Experience, continued

What do I need to do

Planner Section- Additional Configurations: Provides insights into business process definitions for:

- Onboarding
- All business processes that can be used to assign the Onboarding Plan to a new hire.

Planner Section- Suggested Links: You can personalize the Onboarding Planner using the Maintain Hubs task.

Planner Section - Plans: You can create an Effective-Dated Onboarding Plan with a unique name and specify the number of days you want the plan to remain active.

You can also add up to 10 stages per plan and configure a Stage Trigger to define when the plan is delivered to the new hire relative to the Hire Date.

You can also organize content by stage and add a Notification to be triggered for each stage.

https://doc.workday.com/release-notes/en-us/onb/8133451.html

Non-US English Locales on External Career Sites

What's changing

Workday enhances the candidate experience by enabling you to configure the external career site with non-US English locale options. This allows candidates outside the United States to enter dates in the DD/MM/YYYY & YYYY/MM/DD format, aligning with their local date conventions.

Additional considerations

You can now configure the external career site with a non-US English option, ensuring that candidates outside the United States can enter dates in the DD/MM/YYYY & YYYY/MM/DD formats across all date fields on the site.

Example: Preferred Locale: English (United Kingdom) and Date of Birth: 02/12/2025.

What do I need to do

On the Edit External Career Site task select English (United Kingdom) and English (Canada) from the Languages prompt.

What happens if I do nothing

You'll see no changes and the External Career Site will work as it currently does.

https://doc.workday.com/release-notes/en-us/cxs/8431086.html

Multiple Language Search for Job Description and Job Posting Title

What's changing

In this release, Workday enables multi-language search for translated job postings including the Job Description and the Job Posting Title on the external career sites, allowing candidates to find job opportunities in their preferred language.

Additional considerations

Candidates can now view existing and translated job postings including the Job Description and Job Posting Title, on the external career site in all languages supported by Workday.

What do I need to do

To enable candidates to search for the Job Posting Title and Job Description on the external career site:

- Edit the Find Jobs for External Career Sites report.
- On the Sort tab, select the Sort by Relevance check box.

What happens if I do nothing

Candidates will still be able to search for job opportunities on the external career site.

https://doc.workday.com/release-notes/en-us/cxs/8715589.html

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

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

Learning Recommendations in Preferred Language

What's changing

With this release, Workday enables learners to set their language preferences for the content that appears in learning recommendations.

Additional considerations

Workday adds a new Preferred Languages field to the Learning Preferences task. This allows learners to select one or more languages for the learning content that appears in their learning recommendations within:

- Career Hub.
- Manager Insights Hub.
- Opportunity Graph.
- These Learning sliders:
  - Based On Your Interests.
  - Based on Your Skills to Develop.
  - Grow Your Career.
  - Most Popular.

What do I need to do

Verify that the language field is populated for all the learning content. You can mass update language tags using the Manage Learning Course web service.

(Optional) Use the Configure Optional Fields task to make the Language field required.

Select the Enable Language Preferences check box in the Edit Tenant Setup - HCM task.

Review your training materials and encourage learners to specify their preferred languages in the Learning Preferences task.

https://doc.workday.com/release-notes/en-us/lrn/3712137.html

Learning Recommendations in Preferred Language, continued

Additional considerations

- Popular in Your Role.
- Recently Added.
- Recommended for You.
- You Might Also Be Interested in.

Workday introduces a new Preferred Learning Languages report field on the Person business object (secured to the Public Reporting Items domain). This field allows you to report on the learners preferred languages settings.

Workday updates the Edit Tenant Setup - HCM task to include a new Enable Language Preferences option in the Learning section, allowing administrators to activate this feature.

What do I need to do

Considerations:

- When no content is available in a learner’s preferred language, Workday doesn’t display the corresponding slider. Example: If a learner selects German as their preferred language but no learning content is tagged with German, no recommendations will appear.
- These worklets don’t take into consideration the learner's preferred language: Continue Learning, Required For You, Highlights, learning paths, and custom sliders.

https://doc.workday.com/release-notes/en-us/lrn/3712137.html

Learning Recommendations in Preferred Language, continued

Additional considerations

Workday also introduces new options in the Configure Optional Fields task to ensure learning content is properly tagged. You have the flexibility to require language tags for learning content using these business process types under the Learning Core functional area:

- Manage Course.
- Manage Course Offering.
- Manage Lesson.
- Manage Program.

Note*: The Enforce Required in Web Service option within the task is not yet supported for web services updates to learning content. Workday will update the release note once this becomes available.*

What Happens if I do Nothing?

Workday shows all learning recommendations regardless of language unless you enable this feature and learners specify their preferred language.

https://doc.workday.com/release-notes/en-us/lrn/3712137.html

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

Automatically available

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

Automatically available

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

Engagement Builder

Additional considerations

Workday now delivers the Audience Builder dashboard (secured to the new Administer Audience and existing Administer Campaigns domains) that you can use to create and preview configurable audiences for your engagements.

Workday also delivers these reports and tasks (secured to the Administer Campaigns domain) to support the Audience Builder dashboard:

- Calculate Audience Size.
- Edit Audience.
- View Audience.

Workday delivers the new Engagement Builder report (secured to the Administer Campaigns domain) that you can use to manage engagements. Workday also delivers these reports and tasks to support Engagement Builder:

What do I need to do

Engagement Builder is available in Preview for all HCM customers.

For configuration information and frequently asked questions, see this Community post: Next-Gen Campaigns (Engagement Builder) Webinar - Recording & Resources.

What happens if I do nothing

You can continue to use legacy Campaigns.

https://doc.workday.com/release-notes/en-us/camp/8678565.html

Engagement Builder, continued

Additional considerations

- Engagement Builder Edit.
- Engagement Dashboard.
- View Connect Exclusion Rule.
- View Metadata Connect Exclusion Rule.

Workday delivers these web services (secured to the Administer Audience domain) that you can use to manage your audience information:

- Get Audience Builder (Web Service).
- Put Audience Builder (Web Service).

Workday also delivers these web services (secured to the Administer Campaigns domain) that you can use to manage your engagement information:

- Get Engagement Builder (Web Service).
- Submit Engagement Builder (Web Service).

https://doc.workday.com/release-notes/en-us/camp/8678565.html

Workforce Management

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Change Job Impacts on Time Off

What's changing

With this update, Workday enables you to configure Workday to automatically remove approved time off entries in response to change job events when workers are no longer eligible for the time off or the entries are no longer valid working days for the workers.

Additional considerations

Workday delivers a new Remove invalid Time Off Entries After Job Change service step that you can add to the Change Job business process after the Completion step.

Workday also delivers a new Initiating Business Process of Remove Invalid Time Off Entries Service report field on the Time Off Event business object (secured to the Public Reporting Items domain) that you can use in condition rules and custom reports to identify the business process type that initiated the time off correction event as part of the Remove Invalid Time Of Entries service step.

What do I need to do

Edit the Change Job business process and add the Remove invalid Time Off Entries After Job Change service step after the Completion step.

After the Remove Invalid Time Off Entries After Job Change service step completes, the service step won't reflect any corrections or rescinds of the Change Job event because Workday doesn't support Correct or Rescind actions on time off business processes. Workday recommends that you include the Remove invalid Time Off Entries After Job Change service step later in your Change Job business process definition to reduce the likelihood of it completing prior to any Change Job corrections or rescinds.

After you add the service step for the first time, Workday displays a warning message. Access the Evaluate and Process Events Impacting Absence task to run a background job immediately that initiates evaluation and correction of

https://doc.workday.com/release-notes/en-us/abs/7036390.html

Change Job Impacts on Time Off, continued

What do I need to do

ineligible future time off entries and accrual adjustments. From this point onwards, Workday initiates the background job automatically every 15 minutes

***Note**: If Workday doesn't display a warning message on the business process definition after you add the step for the first time, the background job is already running and you don't need to access the task to run the job.*

What happens if I do nothing

If you don't take action, invalid time off entries due to changes in working days or eligibility can remain on workers' absence calendars. This results in invalid data, which can negatively impact reporting, balance calculation, integrations, and payroll processing. Absence administrators, HR Partners, or HR Specialists need to manually navigate to workers' calendars and remove these entries.

https://doc.workday.com/release-notes/en-us/abs/7036390.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

Setup required

Assign Work Schedule Impacts on Time Off

What's changing

With this update, Workday enables you to configure Workday to automatically remove an approved time off entries in response to assign work schedule events when workers are no longer eligible for the time off or the entries are no longer valid working days for the workers.

Additional considerations

Workday delivers a new Remove Invalid Time Off Entries After Work Schedule Assignment service step that you can add to the Assign Work Schedule business process after the Completion step.

Workday also delivers a new Initiating Business Process of Remove Invalid Time Off Entries Service report field on the Time Off Event business object (secured to the Public Reporting Items domain) that you can use in condition rules and custom reports to identify the business process type that initiated the time off correction event as part of the Remove Invalid Time Of Entries service step.

What do I need to do

Edit the Assign Work Schedule business process and add the Remove Invalid Time Off Entries After Work Schedule Assignment service step after the Completion step.

After the Remove Invalid Time Off Entries After Work Schedule Assignment service step completes, the service step won't reflect any corrections or rescinds of the Assign Work Schedule event because Workday doesn't support Correct or Rescind actions on time off business processes. Workday recommends that you include the Remove invalid Time Off Entries After Work Schedule Assignment service step later in your Assign Work Schedule business process definition to reduce the likelihood of it completing prior to any Assign Work Schedule corrections or rescinds.

After you add the service step for the first time, Workday displays a warning message. Access the Evaluate and Process Events Impacting Absence task to run a background

https://doc.workday.com/release-notes/en-us/abs/7036386.html

Assign Work Schedule Impacts on Time Off, continued

Additional considerations

***Note**: Workday delivers this new report field with the Change Job Impacts on Time Off feature but the report field also applies to the Assign Work Schedule Impacts on Time Off feature*

What do I need to do

job immediately that initiates evaluation and correction of ineligible future time off entries and accrual adjustments. From this point onwards, Workday initiates the background job automatically every 15 minutes.
Note: If Workday doesn’t display a warning message on the business process definition after you add the step for the first time, the background job is already running and you don’t need to access the task to run the job.

What happens if I do nothing

If you don’t take action, invalid time off entries due to changes in working days or eligibility can remain on workers’ absence calendars. This results in invalid data, which can negatively impact reporting, balance calculation, integrations, and payroll processing. Absence administrators, HR Partners, or HR Specialists need to manually navigate to workers’ calendars and remove these entries.

https://doc.workday.com/release-notes/en-us/abs/7036386.html

Start and End Times on Absence Tables

What's changing

With this release, you can configure the ability for workers to enter start and end times on time off requests against absence tables when they enter time off using these tasks and reports:

- Enter Time by Week.
- Enter Time for Worker (High-Volume Time Entry).
- Enter Time (Micro-Edit).
- Request Absence.

This feature enables you to track the exact times that workers plan to be away from work to provide a more seamless integration with Workday Scheduling, the Absence third-party calendar integration, and other planning applications. The Scheduling Optimization Engine can use this data to generate schedules that take into account worker availability.

What do I need to do

To use this feature, you need to:

Configure the new Absence Calendar Experience. Workday doesn't enable you to enter start and end times against absence table requests on the legacy absence and time off calendars.

Access either of these tasks to configure start and end times:

- Create Absence Table.
- Edit Absence Table.

What happens if I do nothing

Workers won't be able to enter start and end times when they request time off against an absence table and you won't be able to track the exact times that workers plan to be away from work.

https://doc.workday.com/release-notes/en-us/abs/8351732.html

Start and End Times on Absence Tables, continued

Additional Considerations

Workday now add these new check boxes on the Details tab of the Create Absence Table and Edit Absence Table tasks:

- Display Start and End Time
- Start and End Time Required

You can select these check boxes when the Entry Option is Enter through Time Off Only to determine whether workers can enter start and end times.

Workday also adds a new Calculate Quantity Based on Start and End Time check box that you can select for any entry option when all tier plans are hour-based.

Web Services

Workday also delivers updates to these Absence Management web services to support start and end times on absence tables:

- Enter Time Off.
- Import Time Off Request Event Batch.

https://doc.workday.com/release-notes/en-us/abs/8351732.html

Start and End Times on Absence Tables, continued

Additional Considerations

Workday adds validation to ensure that time off requests against absence tables respect these start and end time settings on the absence tables:

- Calculate Quantity Based on Start and End Time.
- Display Start and End Time.
- Start and End Time Required.

See the SOAP API Change Log link under Related Information.

Reports

Workday adds these new report fields on the Absence Table business object (secured to the Public Reporting Items domain), which you can use in custom reports and condition rules:

- Calculate Quantity Based on Start and End Time for Absence Table.
- Display Start and End Time for Absence Table.
- Start and End Time Required for Absence Table.

Workday also update the All Absence Tables report to display columns for the new fields

https://doc.workday.com/release-notes/en-us/abs/8351732.html

Effective Dating for Service Dates

What's changing

You can now add effective dates to service date changes.

Additional considerations

Workday updates the Production date for this feature to 2025-03-15. This means that the feature remains on the Maintain Feature Opt-Ins report until 2025R1, when Workday will make it automatically available in Production.

This change is in order to provide you with more time to test the feature in Preview. Workday recommends that you review the feature in your Preview tenants. See the related links for more information on how to identify Absence calculation impacts, and make necessary updates.

What do I need to do

To prepare for this feature delivering to Production in 2025R1, Workday requests that customers take the following actions without delay.

- Review the feature in Preview tenants.
- Understand the Absence calculation impacts. Use the Tenant Analyzer report to identify Absence calculation impacts.
- Make necessary configuration changes, and test Absence calculations.

What happens if I do nothing

Once the feature is automatically available in your Production tenant in 2025R1 on 2025-03-15, there might be impacts to your time off accruals calculations. Workday recommends that you test this feature, evaluate any potential impacts, and make corresponding changes prior to 2025-03-15.

https://doc.workday.com/release-notes/en-us/hrcore/6693151.html

Automatically available

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

Automatically available

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

Transfer Project Time Blocks within Closed Time Entry Periods

What's changing

Workday now enables you to transfer time blocks within closed time entry periods without triggering time calculations or retroactive payroll calculations to run.

This feature enables you to:

- Move time blocks to a different project in a closed period, supporting updates in billing without impacting payroll.
- Maintain work in progress for long periods, and then transfer associated time blocks to other projects.
- Recoup billable hours.

Additional Considerations

Allow Project Transfer in Closed Periods Option

Workday adds a new, tenant-wide Allow Transfers Within Closed Time Entry Periods check box on the Project Transfer

What do I need to do

Access the Set Up Project Billing Configuration task.

On the Project Transfer Options tab, select the Allow Transfers Within Closed Time Entry Periods check box.

Identify time blocks that need to be moved to another project in a closed period.

Transfer the identified time blocks to another project through these supported tasks: Transfer Project Transactions or Manage Project Billing Transactions.

Additional Considerations

If time entry validations are triggered by the project transfer in a closed period, the validations prevent the project transfer from being completed.

If you reopen the period and make changes to the transferred time block or other time blocks in the period, all time blocks, including the transferred time block, are picked up in the next retroactive time calculation for the period.

https://doc.workday.com/release-notes/en-us/finrev/8380733.html

Transfer Project Time Blocks within Closed Time Entry Periods, continued

Additional Considerations

Options tab on the Set Up Project Billing Configuration task.

When you select the option and have access to the Transfer Project Transactions task (secured to the Manage: Project Transaction Transfer subdomain under the parent Manage: Project domain), you can transfer time block transactions with dates that are in a closed time period to another project task.

Time Blocks

Workday adds a new Project Transferred in Closed Period field on the time block, enabling you to easily identify if the project time block is transferred during a closed time entry period. When it is, the field displays with a Yes value. Otherwise, the field isn't displayed.

Also, on the History tab of the time block, the Time Type column displays the project plan tasks that the time block was transferred from and to.

What do I need to do

There is no change to the existing behavior of project transfers in open periods.

If there are retroactive payroll triggering events prior to the project transfer time block event, the project transfer occurs and recalculates payroll.

Time blocks in locked periods behave the same as today, requiring user access to the Time Tracking: Exempt from Lockout domain

What happens if I do nothing

Access the Set Up Project Billing Configuration task.

On the Project Transfer Options tab, select the Allow Transfers Within Closed Time Entry Periods check box.

Identify time blocks that need to be moved to another project in a closed period.

https://doc.workday.com/release-notes/en-us/finrev/8380733.html

Transfer Project Time Blocks within Closed Time Entry Periods, continued

Additional Considerations

Reporting

Workday delivers a new Project Transferred in Closed Period report field on these business objects (secured to the Reports: Time Tracking domain), which enables you to identify the time blocks that were transferred in a closed time entry period:

- Time Block.
- Time Review Event.

Workday also adds a new entry to the Time Block Changes column on the standard Time Block Audit report, enabling you to identify that the project or project plan task was updated, either as a result of a project transfer or because it was edited by a user. In these cases, the column displays with Updated: Time Type.

https://doc.workday.com/release-notes/en-us/finrev/8380733.html

Transfer Project Time Blocks within Closed Time Entry Periods, continued

Additional Considerations

Retroactive Payroll

Time blocks transferred in closed periods don’t trigger retroactive payroll calculations. If there are retroactive payroll triggering events prior to the project transfer time block event, the project transfer occurs and recalculates payroll.

https://doc.workday.com/release-notes/en-us/finrev/8380733.html

Setup required

Third-Party Scheduling

What's changing

With this release, when you import scheduled shifts from third-party systems, you can enable Workday to retrieve related attributes from the worker's imported shift. On both desktop and mobile, when workers check in using the Check In or Add Clock Event tasks, Workday can automatically populate the time entry code, position, and worktags using the data imported from the third-party scheduling system.

This eliminates the expense of maintaining a separate integration system to load worker time and its associated data to Workday, and it makes checking in quicker and easier for workers.

Additional Considerations

Workday adds a new Third-Party Scheduling section to the Noneffective-Dated tab of the time entry template that enables Workday to match schedule events from third-party scheduling systems with Workday check-ins so that

What do I need to do

On the Edit Time Entry Template task, in the Third-Party Scheduling section, enable the applicable options.

What happens if I do nothing

You will see no changes in Workday if you don't enable this feature.

https://doc.workday.com/release-notes/en-us/time/7801594.html

Third-Party Scheduling, continued

Additional Considerations

Workday can populate default values when workers check in. This section contains 2 new check boxes:

- Import from Third-Party Schedules.
- Use Time Tracking Worktag Defaults.

Workday delivers these new report fields on the Time Entry Template business object (secured to the Set Up: Time Tracking domain) that enable you to verify your time entry template setup on the All Time Entry Templates report:

- Import from Third-Party Schedules.
- Use Time Tracking Worktag Defaults.

Workday delivers these new calculated fields on the Time Clock Event business object (secured to the Reports: Time Tracking, Self Service: Time Calendar, and Worker Data: Time Calendar domains) that you can use in your custom reports:

- Time Entry Code on Imported Schedule Event.

https://doc.workday.com/release-notes/en-us/time/7801594.html

Third-Party Scheduling, continued

Additional Considerations

- Position on Imported Schedule Event.
- Variance Exists.
- Worktags on Imported Schedule Event.

Workday updates these web services to support migrating third-party scheduling configurations via OX2.0 or iLoad:

- Get Time Entry Template.
- Put Time Entry Template.

When you select the Import from Third-Party Schedules check box, you can use the Import Ad Hoc Schedules web service to import schedule events as schedule blocks. When workers check in, Workday searches for the nearest schedule block start time within a 12-hour timeframe. If Workday finds a schedule block for the worker, it applies any values specified in the block as default values on the check-in event.

https://doc.workday.com/release-notes/en-us/time/7801594.html

Intelligent Prompt Recommendations for Time Entry

What's changing

Workday provides intelligent prompt recommendations on time type selections. Your users can now select recommended prompt values that are frequently used by your organization to expedite entering time.

Enabling prompt recommendations helps improve accuracy and efficiency in entering time.

Additional Considerations

Maintain Machine Learning Prompt Recommendations Task

Workday provides a new Time Tracking section on the Maintain Machine Learning Prompt Recommendations task that you can use to hide or show the time type prompt recommendations to your users when they select a time type.

Workday also secures the Maintain Machine Learning Prompt.

What do I need to do

You can enable recommendations for the Time Type prompt for each time entry method by selecting the Time Type check box in the Time Tracking section on the Maintain Machine Learning Prompt Recommendations task (secured to the Set Up: Time Tracking domain).

Note*: After you complete the configurations, Workday requires up to 2 weeks to train the intelligent models and display the prompt recommendations in your tenant. Workday automatically refines the models weekly to improve the accuracy of the recommendations.*

What happens if I do Nothing

Your users won't receive prompt recommendations on time type.

https://doc.workday.com/release-notes/en-us/time/8479916.html

Intelligent Prompt Recommendations for Time Entry, continued

Additional Considerations

Recommendations task to the Set up: Time Tracking domain.

Recommended Prompt Filter for Time Type.

You can now configure Workday to display machine learning recommendations on the Time Type prompt on these tasks:

- Check In.
- Edit and Approve Time.
- Enter Time by Type.
- Enter Time by Week.
- Time Block Micro Edit.
- Quick Add.

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

https://doc.workday.com/release-notes/en-us/time/8479916.html

Setup required

Workday Time Kiosk

What’s changing

With the new Workday Time Kiosk app, Time Tracking customers can enable workers to check in and out on an iPad kiosk.

Additional considerations

Workday delivers the new Workday Time Kiosk app that you can install on an iPad. Workers can enter their IDs to check in and out on the app. Check-ins and check-outs flow to Workday as time clock events.

The Workday Time Kiosk supports these languages:

- English (United States).
- French (Canada).

https://doc.workday.com/release-notes/en-us/time/8533365.html

Workday Time Kiosk, continued

What do I need to do

See attachment in the release note.

What happens if I do nothing

You won't see any changes to Workday if you don't enable this feature.

https://doc.workday.com/release-notes/en-us/time/8533365.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.

Thank you

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