

# Top Payroll, Absence and Time Tracking Features Review

Workday 2025R2

9/3/2025



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# Workday's safe harbor

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



# **Your Host**



Tia Taylor

CVS Payroll Consultant



# Release preparation

Check Release Center Change management plan Prepare the tenant Execute test plans

- Review Automatically Available items
- Subscribe to important Release Notes in Community
- Review retirement Release Notes
- Changes to the user experience or process updates
- Retiring functionality
- When to uptake Setup Required functionality
- 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
- 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



## Release features

#### **Payroll**

- Assign Costing Allocation Questionnaire
- Intelligent Prompt Recommendations for Payroll for Canada
- Bank Account Verification for Payment Elections
- Create Multicriteria Advanced Lookup Table



# **Payroll**



# **Assign Costing Allocation Questionnaire**

Require detailed explanations for costing allocations that occur outside an approved date range.

#### Reasons to consider this feature

- Adds a configurable questionnaire to the Assign Costing Allocation business process, allowing for detailed justification of allocations outside approved date ranges.
- Payroll administrators can view questionnaire responses in the Event Details section once the process or questionnaire is completed.
- Uses the new Costing Allocation Submission Date report field to trigger the questionnaire when submission dates exceed a specified threshold from the start date.

#### What do I need to do

- 1. Configure the questionnaire
  - 1. Click Edit Questionnaire Details
  - 2. On the **Allowed-on Business Process** field, select **Assign Costing Allocation**.
- 2. View Questionnaire Responses in Approval Steps



# **Assign Costing Allocation Questionnaire, cont.**

Require detailed explanations for costing allocations that occur outside an approved date range.

#### What happens if I do nothing

 No questionnaire will be required when assigning cost allocations for employees.

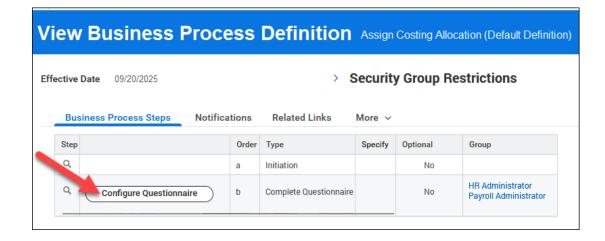
#### **Additional considerations**

None

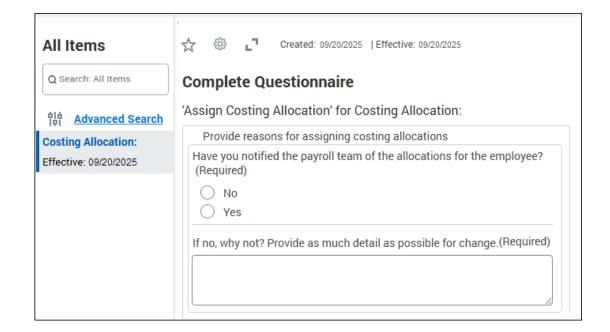


# **Assign Costing Allocation Questionnaire, demo**

#### **Assign Costing Allocation Business Process**



#### **Questionnaire example**





# Intelligent Prompt Recommendations for Payroll for Canada

Improve efficiency in completing ROE and withholding order tasks and reporting.

#### Reasons to consider this feature

- Workday uses machine learning to suggest relevant prompts, helping streamline payroll processes and reduce manual effort.
- You have the flexibility to configure these intelligent recommendations specifically for Payroll in Canada, ensuring alignment with regional requirements and practices.
- By leveraging Al-driven suggestions, your team can make quicker, more informed decisions, ultimately improving payroll accuracy and operational efficiency.

#### What do I need to do

 Nothing, the prompts for Payroll for Canada are automatically selected on the Maintain Machine Learning Prompt Recommendations task.

https://doc.workday.com/release-notes/en-us/paywdcan/8948928.html#Impact-tab



# Intelligent Prompt Recommendations for Payroll for Canada, cont.

Improve efficiency in completing ROE and withholding order tasks and reporting.

#### What happens if I do nothing

- Workday automatically selects the check boxes for the Payroll for Canada fields on the Maintain Machine Learning Prompt Recommendations task.
- To opt out of prompts for specific task fields, clear the relevant check box.

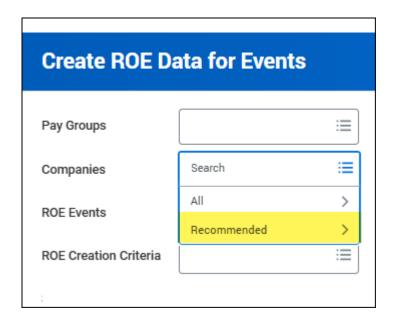
#### **Additional considerations**

 Recommendations may not appear immediately as the machine learning models require sufficient usage data and may take over a month to reach accuracy thresholds.

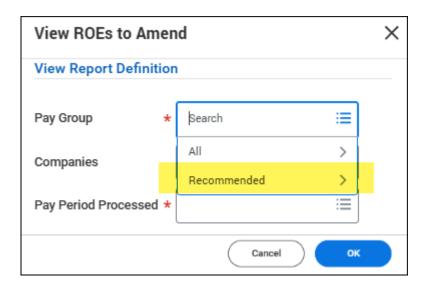


# Intelligent Prompt Recommendations for Payroll for Canada, demo

#### **Recommended option on Create ROE Data for Events**



#### **Recommended options on View ROEs to Amend**





# **Bank Account Verification for Payment Elections**

Strengthen payroll security by blocking unauthorized bank account changes and reduce fraud risk

#### Reasons to consider this feature

- Enhanced Verification for Bank Account Changes
- Block unauthorized bank account changes and reduces fraud risk from phishing attempts.
- Secure Access and Lockout Management
- Adds dynamic account validation with customizable attempt limits and clear error messaging.
- Customizable Help and Automatic Unlocks
- Allows access restoration via unlock tasks and supports custom help text and automatic unlocks after rejections.

#### What do I need to do

- 1. Access the **Edit Tenant Setup Financials** task
- 2. Enable Bank Account Verification for Payment Elections
- 3. Configure the maximum attempts on the **Maximum Attempts Override for Payment Election Verification** field.
- 4. On the **Maintain Payment Elections Help Text** task, enter the help text that displays on the lockout screen.
- Provide access to users to the new domain Manage: Unlock Payment Elections Access. This provides users access to the Unlock Payment Election Access task.

https://doc.workday.com/release-notes/en-us/paywdpymt/8610410.html?lang=en-us#Impact-tab



# Bank Account Verification for Payment Elections, cont.

Strengthen payroll security by blocking unauthorized bank account changes and reduce fraud risk

#### What happens if I do nothing

 Workday won't require the user to verify their bank account before making changes to Change Account Information and Edit Payment Elections tasks.

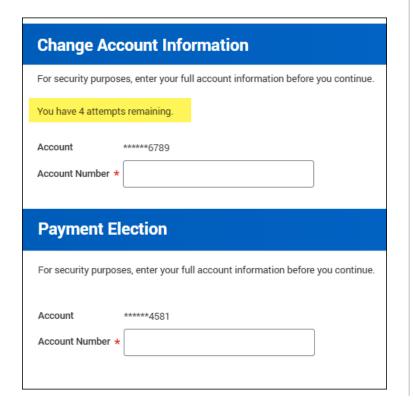
#### **Additional considerations**

- Customers should work with their security team to understand who should own the process using the Unlock Payment Election Access task. To use this task, the user must have access to the new Manage: Unlock Payment Election Access domain.
- Verification does not apply when adding a new bank account as there is no existing data for comparison.

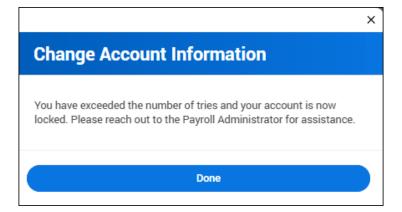


# **Bank Account Verification for Payment Elections demo**

#### **Verify Bank Account**



#### **Lockout message**



#### Administrator unlock report task

#### **Unlock Payment Election Access**

Unlock users blocked from managing bank details and payment elections due to multiple failed verification attempts.

Blocked users 1 item 1 selected

	Person	User Name	Lockout Date and Time
<b>✓</b>	Logan McNeil	Imcneil	08/22/2025 03:21 PM



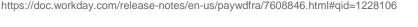
Create an advanced lookup table with values based on a combination of different search criteria types

#### Reasons to consider this feature

- Combine up to five search criteria to reduce the number of calculations and simplify complex processes.
- Fewer steps mean faster execution and better performance across payroll and financial tasks.
- Makes parameter setup and updates easier for implementers and administrators, saving time and effort.

#### What do I need to do

- Use Create Multicriteria Advanced Lookup Table task to create a new table.
- Enable the web services operations Get/Put Multicriteria Lookup Tables to use EIB.





Create an advanced lookup table with values based on a combination of different search criteria types

#### What happens if I do nothing

• No impact.

#### **Additional considerations**

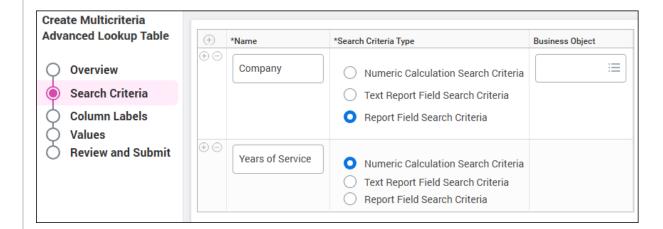
- Once the Search Criteria in a multicriteria advanced lookup table is created, it is fixed and cannot be edited.
- To make changes to search criteria definitions, you need to create a new multicriteria advanced lookup table.
- The Create Lookup Calculation task has been updated to support this feature.



#### **Enter Name and Category of Multicriteria Table**

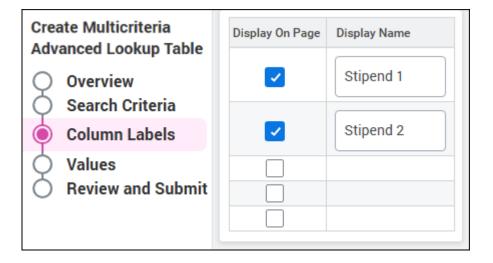


#### **Designate Search Criteria**

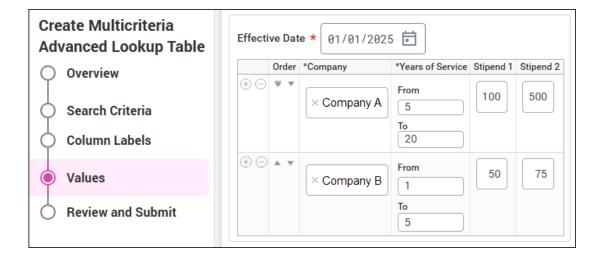




#### **Define Column Names**

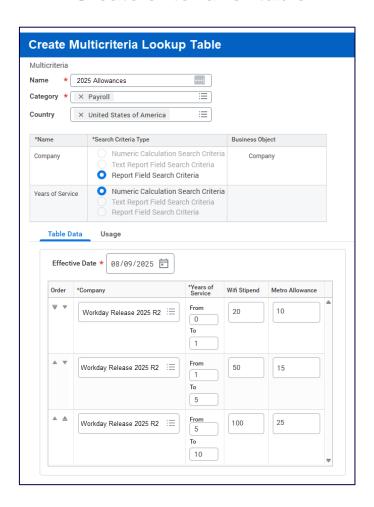


#### **Specify Output**

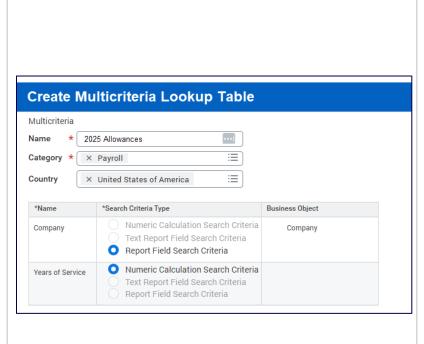




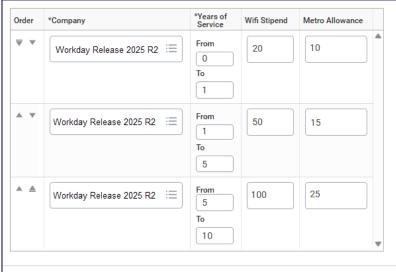
#### Create criteria for table



#### **Enter search criteria**

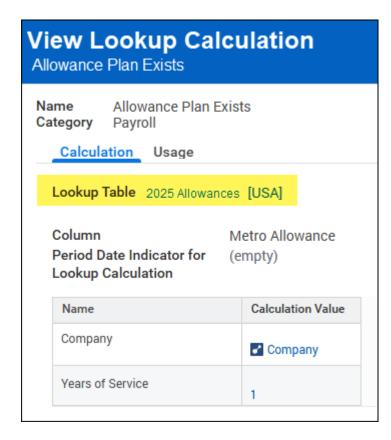


#### **Return output**





# Attach Lookup Table to Lookup Calculation used in earning code



#### **Pay Results**

Pay Component	Amount	MTD	QTD	YTD
Wifi Stipend	50.00	28.92	57.84	245.82
∨ Others				



# Payroll at-a-glance

**Assign Costing Allocation Questionnaire** 

JIRA PAYWDACCT-34464

Setup effort Setup required

Intelligent Prompt
Recommendations for
Payroll for Canada

JIRA PAYWDPYMT-7420, PAYWDPYMT-7176

Setup effort Setup required

Change impact FIN, HCM and STU Modules

**Bank Account Verification for Payment Elections** 

JIRA PAYWDPYMT-7420, PAYWDPYMT-7176

Setup effort Setup required

Change impact FIN, HCM and STU Modules



# Payroll at-a-glance

**Create Multicriteria Advanced Lookup Table** 

JIRA PAYWDCORE-52766

Setup effort Automatically available | EIB Setup Required

Change impact N/A



# **Absence Management**



# **Your Host**



Karen Craig

Director, CVS Absence and Time Tracking



## Release features

#### **Absence Management**

- Document Generation Support for Absence Business Processes
- Payout of Expiring Accruals
- Absence Calendar Experience

#### **Time Tracking**

• Time Management Hub



# **Document Generation Support for Absence Business Processes**

With this update, Workday adds Generate Document as an available action step on Absence business processes.

#### Reasons to consider this feature

The **Generate Document** action step has been added to the Absence business processes, allowing for the dynamic generation of editable documents when workers initiate tasks related to absences, such as requesting time off or a leave of absence. The **Generate Document** action step can be configured on these Absence business processes:

- Absence Case Event
- · Buy Time Off
- Correct Time Off
- Request Leave of Absence
- Request Time Off
- Return Leave of Absence
- Sell Time Off

#### What do I need to do

This feature is automatically available but does require come configuration to customize for your administrative needs. To use this feature you will need to create a document template using either the traditional text block method or Workday Docs. Specific instructions for each method can be found on Community.

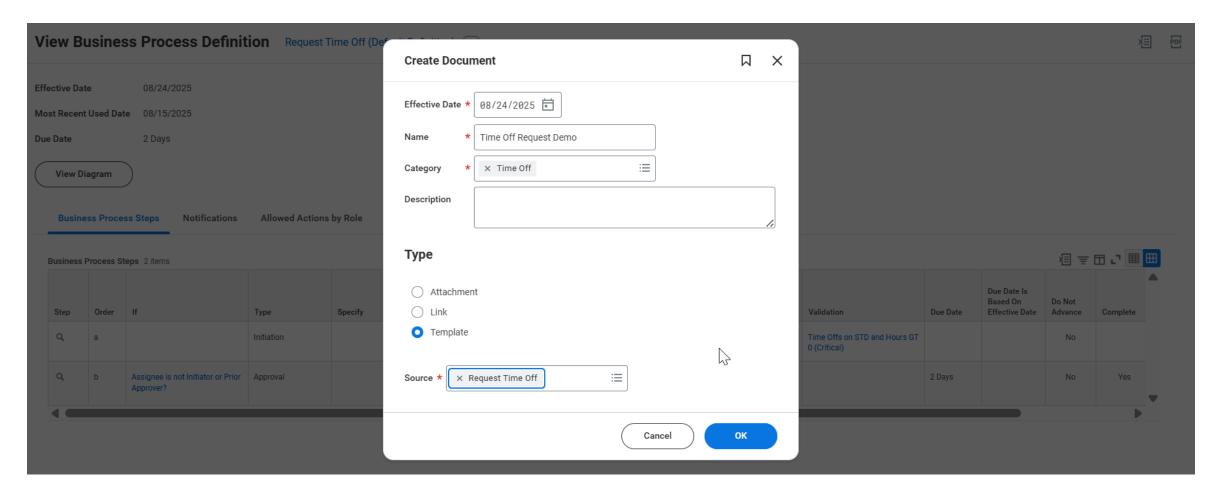
Once your Template is created, you will need to add and configure a *Generate Document* action step as part of the applicable Absence business process definition.

**Document Generation Support for Absence Business Processes** 



# **Document Generation Support for Absence Business Processes Demo**

#### **Create Document Task**





# **Document Generation Support for Absence Business Processes Demo, cont.**

#### Add Generate Document Step to the desired Business Process

Busines	s Process	Steps Notifications	Allowed Actions by Role All	lowed Services Related Links	Available Rules & Fields				
Business P	Business Process Steps 3 items								
<b>(+)</b>								Generate Document  Personnel Action Request	^
	Step		*Order	Parallel Step Order in My Tasks	If	Notes	*Type	Request Delegation Change Review Time Off Request	Optic
$\Theta$			С				Action ▼	Search :=	
	Q		а						
$\ominus$	Q		b		Assignee is not Initiator or Prior Approver?		Approval		
1.									▼
7									



# **Document Generation Support for Absence Business Processes Demo, cont.**

#### What happens if I do nothing

 Nothing – this feature is automatically available but the configuration detailed above is required for use.

#### **Additional considerations**

We recommend that you add the *Generate*Document action step after the Completion step in the business process.

We also recommend that you then add a *Review Documents* step. When you configure the review document step, select the *Generate Document* action step that you added in Step 2.



# **Payout of Expiring Accruals**

With this release, Workday extends its Accrual Expiration functionality, enabling you to configure time off plans to automatically pay out unused, expiring accruals using the new Time Off Forfeiture Adjustment Process.

#### Reasons to consider this feature

**Payout of Expiring Accruals** functionality enables you to manage the payout of expiring accruals more efficiently by:

- Streamlining manual tasks
- Eliminating the need for costly workarounds
- Using Workday's delivered framework to simplify your setup and save time through automation

#### What do I need to do

This feature is automatically available but does require come configuration to customize for your administrative needs.

Create Time Off: On the Create Time Off task, select the Enable for Forfeiture Adjustment checkbox. Then, on the new Forfeiture Options tab, choose Expiring Accruals.

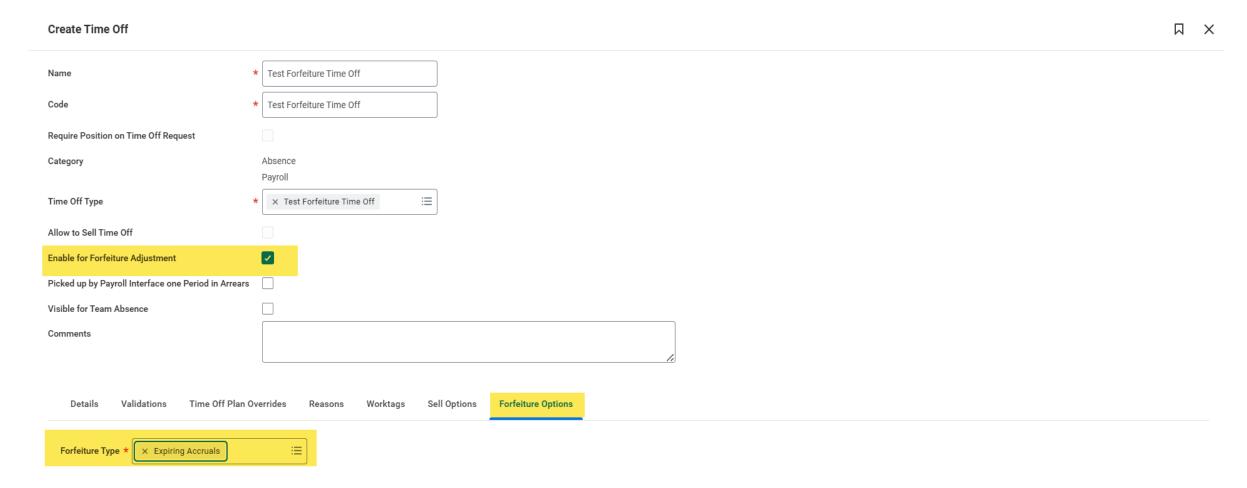
Add to a Time Off Plan: Access the Create Time Off Plan task or Edit Time Off Plan task. Add the new forfeiture time off to the plan. The Time Off for Forfeiture Adjustment field will automatically populate on the Time Off tab. If it doesn't populate, you must manually add it to use this feature.

**Security and Permissions**: Enable the *Process: Time Off Forfeiture Adjustment* domain and configure security permissions.



# **Payout of Expiring Accruals Demo**

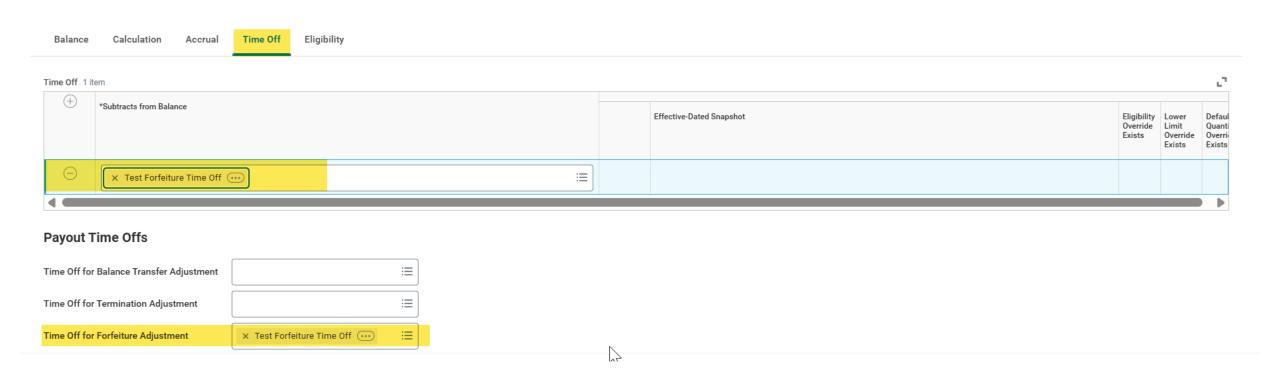
Create Time Off with Forfeiture Adjustment Enabled and Expiring Accruals Selected





# Payout of Expiring Accruals Demo, cont.

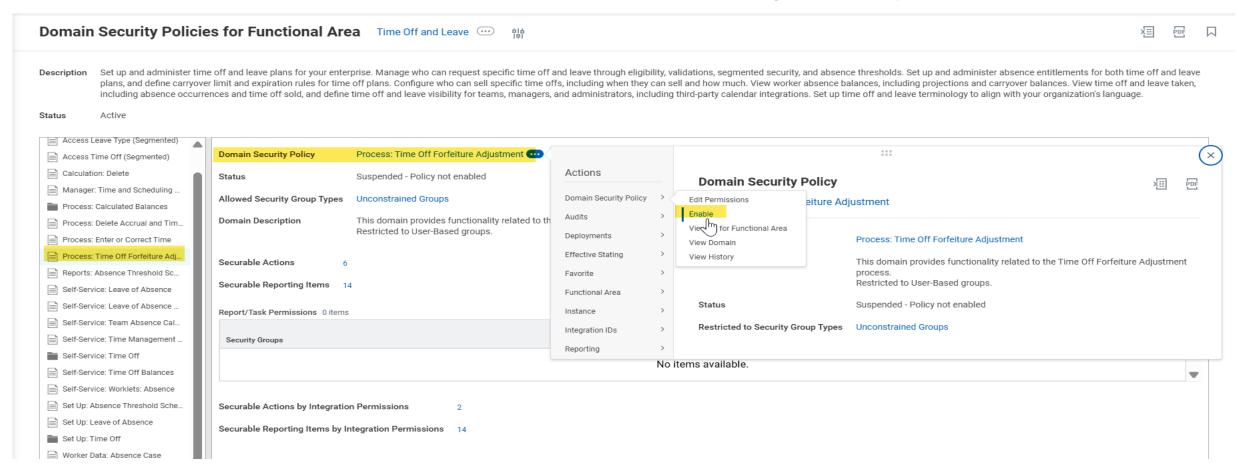
#### Add The Forfeiture Time Off to the Applicable Time Off Plan





# Payout of Expiring Accruals Demo, cont.

Enable the *Process: Time Off Forfeiture Adjustment* domain and configure security permissions.





# Payout of Expiring Accruals, cont.

#### What happens if I do nothing

Unused Expiring Accruals will continue to be forfeited and will continue to be visible in the **Expiring Accruals**Forfeited in Period column of Time Off Reports as of the accrual expiration date.

#### **Additional considerations**

You cannot define the **Time Off for Forfeiture Adjustment** field on a past dated time off plan snapshot.

Once you enable the Domain Security Policy and add security role permissions, remember to **Activate Pending Security Policy Changes** for these to take effect.

**Map to Payroll**: Map the Absence Component Related Calc (ACRC) of the new forfeiture time off to an Earning or External Earning for payout.

- Workday Payroll customers will use the Create
   Earning task or Edit Earning task.
- Third-Party Payroll customers will use the **Create External Earning** task or **Edit External Earning** task.



# **Absence Calendar Experience**

With this release, Workday makes multiple updates to the Absence Calendar experience including functionality and the calendar views provided with Request and Manage Absence tasks.

#### Reasons to consider this feature

The **New Absence Calendar Experience** allows workers to add one or multiple time off entries for the same date in a single request, provided there are no configured restrictions. Key features and benefits include:

- Edit Individual Days: Workers can edit specific days within their absence requests.
- Add Days: An option to add additional days to the request is available.
- Change Date Value: Workers can modify the date of existing time off entries.
- Flexibility: Workers can combine different types of time off or adjust requests based on their available balances.
- **Efficiency**: Simplifies the management of complex absence scenarios and reduces the need to navigate back to the calendar for modifications.

#### What do I need to do

These enhancements are automatically available if the new Absence Calendar Experience was previously configured.

Workday has made the **New Absence Calendar Experience mandatory** starting with the **2025R2 Feature Release**.

**Action Required**: Administrators need to test the new experience and make necessary adjustments in their production environment as soon as possible.

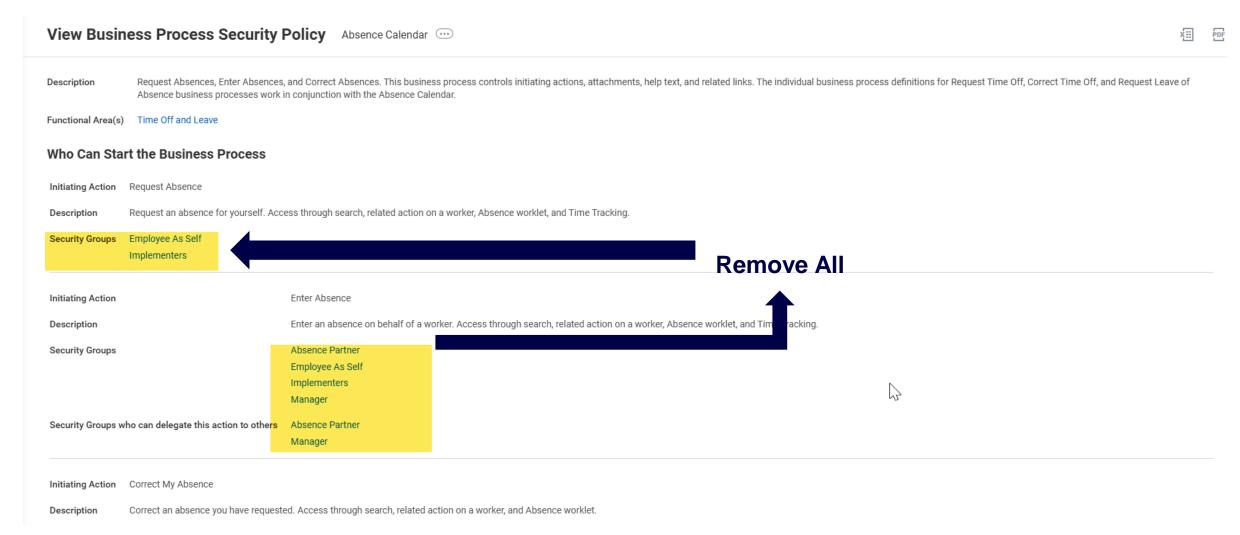
**Security Policies**: Update the business process security policies for time off and leave to include new initiating actions and remove security from old actions.

New Absence Calendar Experience: Multiple Time Off Entries for the Same Date as One Requests



#### **Absence Calendar Demo**

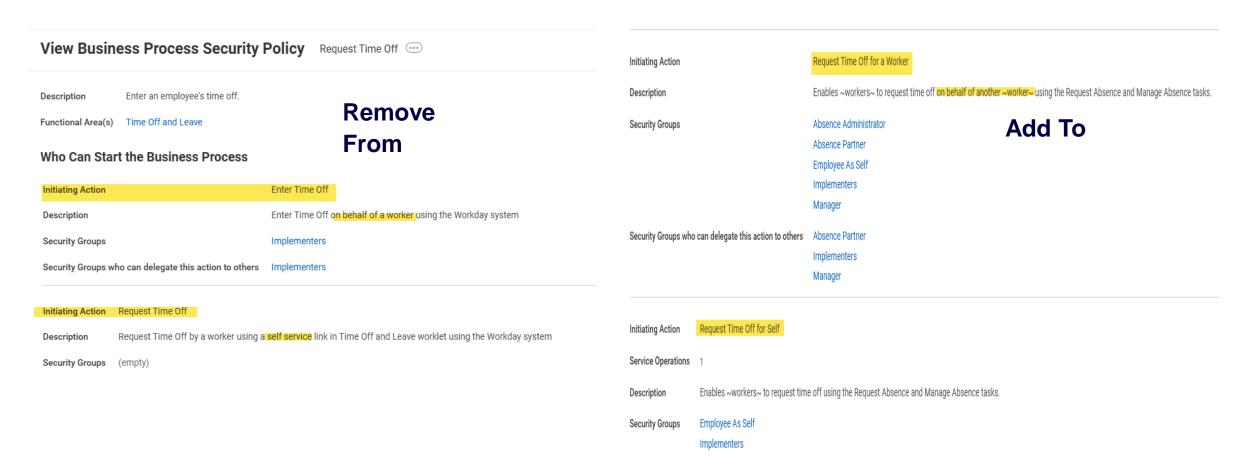
#### Remove all Security Groups from your Absence Calendar Business Process Security Policy





# Absence Calendar Demo, cont.

Remove Security Groups from the Request Time Off sections and Add Same to Request Absence sections



Fictional information displayed. For illustrative purposes only. Actual screens may vary.

Complete for BPs: Absence Calendar, Request Time Off, Correct Time Off and Request Leave of Absence



# **Absence Calendar Demo, cont.**

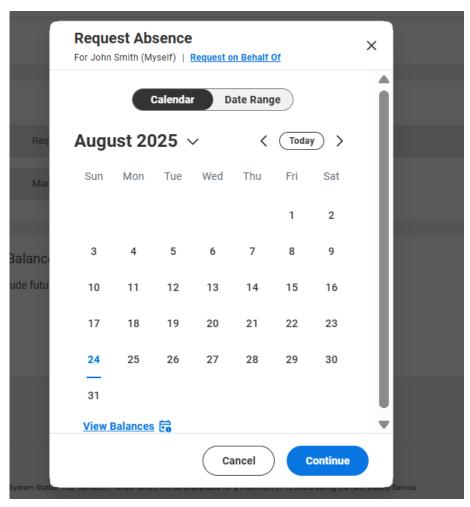
Manage Absence John Smith ...

Today 〈 > August 2025 ✓								
S	unday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
	27	28	29	30	31	Aug 1	2	View Your Requests and Balances per Plan as of date  Balances Requests
	3	4	5	6	7	8	9	Balances as of 08/24/2025
	10	11	12	13	14	15	16	
	17	18	19	20	21	22	23	<b>₽</b>
	24	25	26	27	28	29	30	



# **Absence Calendar Demo, cont.**

#### Request Absence Calendar View



Fictional information displayed. For illustrative purposes only. Actual screens may vary.



# **Absence Calendar Experience, cont.**

#### What happens if I do nothing

Workday has made this update mandatory for 2025R2. You may experience issues with the Request Time Off, Request Leave and Correct Time Off processes.

It is crucial to start the enabling process now to ensure a smooth transition to the new system.

If no changes are made, the announcement regarding the new experience will be automatically removed when there are no security groups on the legacy initiating actions.

- Other Features Dependent on the New Experience:
- Worktags on Time Off
- Leave Units Proration Based on Percentage
- Time Offs Crossing Midnight

#### **Additional considerations**

Once you enable the Domain Security Policy and add security role permissions, remember to **Activate Pending Security Policy Changes** for these to take effect.

Ensure that your Worklets are enabled and configured as desired:

- Absence
- Request Absence
- Manage Absence
- Time Off

Consider configurating Absence Type Groups to group your time off and leaves in the request selection drop down (especially if leaves are self-service).



# **Absence Management at-a-glance**

Document Generation
Support for Absence
Business Processes

JIRA ABS-40864

Setup effort Setup required

Change impact None/Voluntary process improvement

Payout of Expiring Accruals

JIRA ABS-53827, ABS-59451

Setup effort Setup required

Change impact Existing time off plan configurations can be updated if company time off policy requires payout of accruals

**Absence Calendar Experience** 

JIRA ABS-63074

Setup effort Setup required

Change impact Mandatory Update



# **Time Tracking**



# **Time Management Hub**

With this release, Workday delivers a new Time Management Hub to provide employees with a single point of access to navigate to their Absence, Time Tracking and Scheduling tasks.

#### Reasons to consider this feature

The **Time Management Hub** is designed to provide employees with a centralized access point for managing their time-related tasks. Key features include:

- Single Access Point: Consolidates Absence, Time Tracking, and Scheduling tasks in one location for both mobile and desktop users.
- User Experience Improvement: Prioritizes relevant tasks, reducing the time and effort needed to manage absences, time entries, and schedules.

#### What do I need to do

Configure the **Self-Service: Time Management Hub** domain in the Time Off and Leave, Time Tracking, and Workday Scheduling functional areas.

**Note:** Workday recommends you remove any Absence, Time or Scheduling worklets from the Home page if you give users access to the Time Management Hub.

Use the **Maintain Hubs** task to configure the hub based on your organization's needs, including:

- Adding announcements for specific populations
- Adding suggested links
- Configuring quick actions and hub navigation items

Time Management Hub



# Time Management Hub Configurable Functionality

On the **Overview** page of the hub, Workday delivers a **Tasks and Reports** section with these buttons for frequently used tasks:

- Request Absence
- Request Return from Leave of Absence
- Time Requests
- Buy Time Off
- Sell Time Off
- Check In/Out (on mobile only)
- Workday also delivers the following cards on the Overview page:
  - Time Clock: Check in and check out on desktop.
  - Enter my Time: Enter time through the Time Entry Calendar, submit high-volume time entries, and enter time through mobile.
  - **Submit Time (HVTE):** Enables high-volume time entry users to submit time.
  - My Expiring Accruals: Allows workers to manage and track time off accruals that are expiring soon.
  - Absence Balances: Enables workers to view their absence balances based on a specified Balance As Of date.
  - **Upcoming Shifts:** Enables workers to stay informed about scheduled work periods and related activities.
- **Security:** Workday delivers the *Self-Service: Time Management Hub* domain (in the Time Off and Leave, Time Tracking, and Workday Scheduling functional areas) to provide your users with access to the new Time Management Hub. This domain allows only the *Self-Service Worker* security group to access the hub.

Fictional information displayed. For illustrative purposes only. Actual screens may vary



# Time Management Hub, cont.

#### What happens if I do nothing

If you do nothing, your users can't access the Time Management Hub.

#### **Additional considerations**

There are known visibility/usage issues with using Absence from the Time Management Hub via mobile. Workday is currently investigating these reported issues but you may want to consider waiting until these are resolved if you plan to use Absence as a part of this centralized functionality.



# **Time Tracking at-a-glance**

#### **Time Management Hub**

JIRA TIME-56354, SCLO-22335

Setup effort Setup required

Change impact Not required; Impact to user experience if implemented



# **Next steps**

#### Contact your Cognizant Engagement Manager for additional support with:





Building or updating your strategic roadmap



User adoption and change management



# 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

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

Pre-/Post release audits, feature review, consulting support

Recommended for clients that need assistance resolving issues and may not have time or resources to conduct all audits

Full Support

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

Regression Testing

Recommended for clients that need assistance with testing entire modules and/or may not have the time or resources do this themselves





# Thank you

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