



# Top HCM features review

Workday 2025R1

March 4, 2025

# Your hosts



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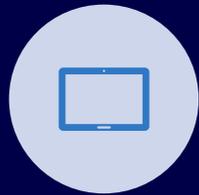
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Today's presentation may contain forward looking statements that are subject to risks and assumption as described in Workday's SEC filings.

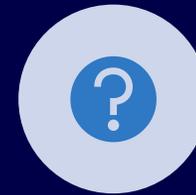
# Housekeeping items



*All lines will be muted for today's webinar*



*Please submit any questions via the Q&A feature throughout the presentation*



*We will leave time at the end of the presentation for an additional Q&A*



*There will be a brief survey sent out at the end of this webinar*



*We will be following up with a FAQ Sheet with the Q&A from the session*

# Release preparation

Check Release Center

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

Change management plan

- Changes to the 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>

# Your team of experts



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# Release features

## Core HCM

- Edit To Do Task
- Configure Additional Address Components
- Security History for Users Audit Report
- View Additional Organizations on Org Chart Side Panel
- Change Job Updates
- Get Ready for the Enhanced Change Job Experience with 2025R2

## Absence

- Change Job Impacts on Time Off
- Assign Work Schedule Impacts on Time Off
- Effective Dating for Service Dates

## Benefits

- Purge Dependents and Beneficiaries for Active Workers
- Benefit Credit Offsets for Workday Payroll
- Contribution and Credit Frequencies

## Time Tracking

- Intelligent Prompt Recommendations for Time Entry
- Workday Time Kiosk

## Compensation

- Total Rewards Template Conversion
- Increased Flexibility for Compa-Ratio and Position in Range Fields
- Minimum Wage in Compensation

# Release features, cont.

## Advanced Compensation

- Infinite Scrolling on Compensation Review Grid
- Configurable Visibility of Pools and Budget Wheels
- Individual Target Improved User Interface for Funded Plans
- Propose Compensation Hire as Substep of Hire

## Learning

- Engagement Builder/ Next-Gen Campaigns
  - Audience Builder
  - Message Builder

## People Experience

- Journeys Security to Preview a Journey
- Tasks and Reports in Search
- Onboarding Experience on Workday Home

## Payroll

- Request Payroll Inputs Business Process
- Pay Group and Pay Component Summary Reports
- Lock Pay Group for Auditing
- Benefits and Pay Hub Enhancements

# Release features, cont.

## Recruiting

- New Workday Onboarding Experience

## Performance

- Printing Employee Reviews for Additional Personas

## Talent Management

- Advance Steps in the Assess Skills Business Process
- Flex Teams Web Services
- Consolidated Interests Web Services
- Consolidated Interests Web Services

# Core Human Capital Management

# Presented by



Kim Roberts

Sr. Manager, CVS Consulting  
Services



Nancy Baugh

CVS Principal Consultant

# Edit To Do Task

Workday now enables you to use a standalone task or related action to edit To Dos

## Reasons to consider this feature

- Provides an improved user experience and faster workflows by enabling you to directly edit To Dos with a standalone task or related action

## What do I need to do

- Nothing as this feature is automatically available (finally!) :)

<https://doc.workday.com/release-notes/en-us/efcore/8768668.html>

# Edit To Do Task

## Edit To Do task

### Edit To Do ✕

Effective Date \* 02/11/2025

Time Zone \* ✕ GMT-08:00 Pacific Time (Los Angeles)

To Do Prompt \*

Cancel OK

## Edit To Dos from related actions

### Maintain To Dos

Effective Date 02/11/2025

140 items

To Do	Inactive	To Do Description	Instructional Text	Show Report Document	Related Links	Task
<input type="text"/>	No	Add a Mentor Buddy				

**Actions**

- To Do ✕
- Admins
- Deployments
- Effective Stating
- Favorite
- Instance
- Integration IDs
- Reporting
- Solution
- To Dos
- Translation

**To Do** ✕

Edit a professional training certificate for medical representatives

**To Do Description** Add a professional training certificate for medical representatives

**Task** Add Certification

click "Add"

# Configure Additional Address Components

Use Maintain Address Components to add additional custom address components for all countries

## Reasons to consider this feature

- **Compliance:** Ensure adherence to government requirements by capturing specific address data.
- **Flexibility and Speed:** Gain enhanced flexibility in collecting and utilizing address data to suit your integration requirements.
- **Global Expansion:** Customize address formats by country to gather accurate and complete address data, ensuring smooth business operations.

## What do I need to do

Review **integration** systems that use these addresses to ensure they can accommodate additional components.

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

# Configure Additional Address Components

Add new address components by country for all addresses

## 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.

## Additional Considerations

- Configuration changes that you make on the Address Components tab don't impact Recruiting Address Components.

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

# Configure Additional Address Components

**Maintain Address Components by Country** Italy 1/1

Select the Recruiting Address Components tab to set up addresses specifically for Recruiting. Select the Address Components tab to set up addresses for all other functional areas in Workday. You can set up which address components to show, hide, or require when a user enters an address.

**Address Components** Recruiting Address Components

You are currently using Extended Address Format for this country. To change this setting, go to the Edit Tenant Setup - Global task.

8 items

Order	*Component	Basic Format	Extended Format	Allowed	Required	Enforce Required in Web Services	Label Override	Vendor Address Component
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>				
	× Address Line 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× Additional Address	× Subpremise Number
	× Address Line 3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× Street or Place Type	
	Address Line 1	<input checked="" type="checkbox"/>	× Street or Place Name	× Street				
	× Address Line 4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	× Street Number	× Premise Number
	Postal Code	<input checked="" type="checkbox"/>		× Postal Code				
	City	<input checked="" type="checkbox"/>	× City (Comune)	× Locality				
	Region	<input checked="" type="checkbox"/>	× Province	× Administrative Area Level 2				

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

# Security History for Users Audit Report

View changes in users' or organizations' security group membership within a given time frame.

## Reasons to consider this feature

Beyond facilitating compliance with Sarbanes-Oxley auditing and reporting standards, this new report allows security administrators to efficiently track changes in security assignments within a designated time frame.

## What do I need to do

Review the domain "Security Administration" for appropriate access.

<https://doc.workday.com/release-notes/en-us/configsec/8372661.html>

# Security History for Users Audit Report

View changes in users' or organizations' security group membership within a given time frame.

## What happens if I do nothing

Report is automatically available.

## Additional considerations

- This report only applies to **user-based security groups** (Role-Based was delivered previously)
- Workday plans on expanding the list of available groups in future releases.

<https://doc.workday.com/release-notes/en-us/configsec/8372661.html>

# Security History for Users Audit Report demo

Review changes to User-Based security groups

**Security History for Users Audit Report** ✕

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**Security History for Users Audit Report**

From:

To:

Users:

Organizations:

Include Subordinate Organizations:

Security History Event	Created On	Effective Date	Security Groups Affected	Security Revoked	Security Group Type	Subject of Event	User Type	Completed By
Security History Event on 02/17/2025, 9:32:38 910 AM	02/17/2025 09:32:38 910 AM	02/17/2025 09:32:38 910 AM	Report Writer	Yes	User-Based Security Group		Employee	
User-Based Group Change - Event Life Type on 02/17/2025, 9:30:32 280 AM	02/17/2025 09:30:32 280 AM	02/17/2025 09:30:32 280 AM	Benefits Administrator Report Administrator		User-Based Security Group		Employee	
User-Based Group Change - Event Life Type on 02/13/2025, 11:04:26 408 AM	02/13/2025 11:04:26 408 AM	02/13/2025 11:04:26 408 AM	Attachment Download Access Risk50n Auth Test Financial Executive (Inactive) Health Corporate Administrator (Inactive) Non-Workbench User More (2)	Yes	User-Based Security Group		Employee	
User-Based Group Change - Event Life Type on 02/13/2025, 10:28:52 406 AM	02/13/2025 10:28:52 406 AM	02/13/2025 10:28:52 406 AM	Multifactor Security Group 1 (username + tenant challenge questions) Multifactor Security Group 2 (username + one time password) Multifactor Security Group 3 (username + time based one-time passcode) Multifactor Security Group 4 (username + one-time passcode - email) Safety Corporate Administrator (Inactive) More (4)	Yes	User-Based Security Group		Employee	

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

# View Additional Organizations on Org Chart Side Panel

You can now view matrix and supervisory organizations that workers belong to or manage from a side panel of the org chart.

## Reasons to consider this feature

- This feature grants employees, especially those in matrix organizations and management, the ability to clearly visualize and comprehend their organizational structure.

## What do I need to do

- From the Org Chart section on the Edit Tenant Setup - HCM task, uncheck the Additional Organization View option in the Always Hide box.
- Confirm your security set up to ensure workers do not see Error screens:
  - Workers need access to position information (Worker Data: All Positions, Worker Position: View, Self-Service: Current Staffing Information domains)
  - Organization visibility is set appropriately

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

# View Additional Organizations on Org Chart Side Panel

You can now view matrix and supervisory organizations that workers belong to or manage from a side panel of the org chart

## What happens if I do nothing

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

## Additional considerations

- Update your training materials.
- This feature is not available on mobile.
- This feature is only available for current organization and position data, Workday does not support the ability to view historical data.

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

# View Additional Organizations on Org Chart Side Panel

**Edit Tenant Setup - HCM**

**Org Chart**

Enable User Facing Filters

- Contingent Workers
- Open Positions

Always Hide

Search

Additional Organization View

Organization Name	Customer Support Center
Availability Date	01/01/2000
Type	Matrix
Subtype	Matrix
<b>Visibility</b>	<b>Everyone</b>

**Org Chart (Org View)**

Customize Chart View

Global Support - Western & N -  
Director, Global Support  
@ Stockholm

Global Support - Benelux Grp -  
Manager, Global Support  
@ Amsterdam

Global Support - Eastern Eur -  
Manager, Global Support  
@ Moscow

Global Support - France Grp -  
Manager, Global Support  
@ Paris

**Global Support - Nordics Grp -**  
Manager, Global Support  
@ Stockholm

Global Support - UK & Ireland -  
Manager, Global Support  
@ London

Administrat  
@ Stoc

**Organizations of**

Positions in Organizations  
All Positions

**Manager of**

- Include inherited organizations
- Customer Support Center Matrix
- Global Support - Nordics Group Supervisory
- Stockholm Customer Support Department Supervisory

**Member of**

- Global Support - Western & Northern Europe Group Supervisory
- Information Analysis Department Supervisory

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

# Change Job Feature Updates

Workday continues to enhance the new Change Job Templates

Feature	Summary	What do I need to do?
New User Experience for Corrections	The enhanced user experience is available for Change Job corrections.	The "Enable Enhanced UI for this Template" check box selected.
New User Experience on Mobile	The enhanced user experience now displays in mobile when users launch templates that include Assign Collective Agreement, Change Organization Assignments, or Propose Compensation.	The "Enable Enhanced UI for this Template" check box selected.
Editable Supervisory Organization	Allows users to select the correct subordinate organization when transferring workers to a new manager on this tasks: <ul style="list-style-type: none"> <li>Review Change Job</li> <li>Review: Receiving ~Manager~</li> </ul>	Only available with the new Change Job experience and Change Job templates.
Configure Optional Fields <i>Setup required</i>	Enables additional Change Job fields on the <b>Configure Optional Fields</b> task	Configure Optional Fields for the Change Job Functional area.

<https://doc.workday.com/release-notes/en-us/hrcore/8693362.html>  
<https://doc.workday.com/release-notes/en-us/hrcore/8386701.html>  
<https://doc.workday.com/release-notes/en-us/hrcore/8455001.html>  
<https://doc.workday.com/release-notes/en-us/hrcore/8693351.html>

# Get Ready for the Enhanced Change Job Experience with 2025R2

Workday's Change Job solution delivers a seamless and user-friendly experience, streamlining the entire process from start to finish.

## Reasons to consider this feature

- The new Change Job experience provides:
  - Improved user experience
  - Simplified tasks improve discoverability and data accuracy
  - Reduced time to complete transactions
  - It's required in the next release :)

## What do I need to do

- Depending on where you are in your Change Job journey, you will need to:
  - Create or update templates (Change Job and Propose Compensation)
  - Review current security configurations
  - Review optional fields configuration
  - Review localization settings configuration
  - Review and implement additional optimization capabilities
  - Create a change management, communication, and training plan

<https://doc.workday.com/release-notes/en-us/hrcore/7872620.html>

# Get Ready for the Enhanced Change Job Experience with 2025R2, cont.

## What happens if I do nothing

- If you **haven't** adopted Change Job Templates Workday will:
  - Automatically migrate your Change Job process into a single template with the new UI.
  - Automatically convert certain domain security configurations
- If you **have adopted/partially adopted** Change Job Templates Workday will:
  - Automatically convert existing templates to use the new UI
  - Require that you evaluate your security setup

## Additional considerations

- Resources
  - Open a support case with the Cognizant Workday Practice
  - [Get Ready for the Enhanced Change Job Experience with 2025R2](#)
  - [Next Level Series – Change Job Enhancements: Optimize the Manager Experience](#)
- Consider Supporting Functionality
  - Guidance Workspace
  - Machine Learning Recommendations for Change Job
  - Maintain Custom Labels
  - Staffing Field Defaults
  - WD Recruiting

<https://doc.workday.com/release-notes/en-us/hrcore/7872620.html>

# How we can help you prepare

## Change job feature updates

- Configuration support
  - Review existing Change Job configuration and usage
  - Explore/Demo supporting or new functionality not yet implemented
  - Configuration and knowledge transfer support
- Change Management Support

Contact your Engagement Manager or submit a case in Service Cloud today.

# Core HCM features at-a-glance

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## Edit To Do Task

JIRA EFCORE-27748

Setup effort Automatically available

Change impact Easily edit To Dos using the new Edit To Do task

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## Configure Additional Address Components

JIRA HRPERSON-21688

Setup effort Automatically available

Change impact You can now add additional components for all countries

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## Security History for Users Audit Report

JIRA CONFIGSEC-9821

Setup effort Automatically available

Change impact Easily audit user-based security

# Core HCM features at-a-glance, cont.

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## View Additional Organizations on Org Chart Side Panel

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JIRA	ORG-20048
Setup effort	Setup required
Change impact	Increased visibility of Organization Structure

---

## Change Job Feature Updates

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JIRA	HRCORE-94395, HRCORE-100539, HRCORE-102109, HRCORE-97265
Setup effort	Setup required/Automatically available
Change impact	Increased functionality on Change Job Templates

---

## Get Ready for the Enhanced Change Job Experience with 2025R2

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JIRA	HRCORE-96669
Setup effort	Setup required
Change impact	Current functionality being retired in 2025R2

# Benefits

# Presented by



Connie Goodman

CVS Sr. Principal Consultant

# Purge Dependents and Beneficiaries for Active Workers

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

## Reasons to consider this feature

- Previously, you could only purge this data for terminated workers

## What do I need to do

- Create and run a custom report that returns the active workers whose beneficiaries and dependents you want to purge.
- Add the Purge tag to the custom report.
- Open a service ticket requesting to purge active dependents and beneficiaries and include a list of purge instances from the report created in the previous step.
- Workday Support will notify you when the Workers Dependents and Beneficiaries purgeable data type is active in your production tenant

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

# Purge Dependents and Beneficiaries for Active Workers, cont.

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

## What happens if I do nothing

- If you do nothing, you can't purge dependent and beneficiary data for active employees

## Additional considerations

After purging dependents and beneficiaries, Workday will deactivate the Workers Dependents and Beneficiaries purgeable data type in your production tenant.

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

# Benefit Credit Offsets for Workday Payroll

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

## Reasons to consider this feature

- With these updates, you can configure benefit credits in Payroll to more easily offset the cost of a worker's benefit election either through 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

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

# Benefit Credit Offsets for Workday Payroll, cont.

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

## What happens if I do nothing

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

## Additional considerations

Workday delivered 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

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

# Benefit Credits demo

Enable remaining benefit credits

**Benefit Group** Active Employees in U.S. - Salaried  

Effective Date 02/17/2025

Inactive No

Benefit Group Name Active Employees in U.S. - Salaried

Description (empty)

Group Rules    Benefit Plans    Cross Plan Dependencies    Benefit Defaults    **Benefit Credits**    Benefit Plan Mappings

Enable Benefit Credits	Yes
Enable Remaining Benefit Credits	No
Display Benefit Credits in Enrollment	Yes
Excess Credits to Health Spending Account (Canada)	No



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

# Contribution and Credit Frequencies

Correctly display frequency in the Company Contribution column on the Plans Available table

## Reasons to consider this feature

- When a worker selects plans during a life event or open enrollment, we now correctly display the frequency, such as (Monthly), in the name of the Company Contribution column on the Plans Available table
- We also now correctly display the frequency in the name of the Credit column in the table when a worker selects plans that include credits, such as medical plans

## What do I need to do

No action necessary.

<https://doc.workday.com/release-notes/en-us/hrbenenroll/8448323.html>

# Contribution and Credit Frequencies demo

## Frequency Display

### Plans Available

Select a plan or Waive to opt out of Medical. The displayed cost of waived plans assumes coverage for EE - Employee Only.

3 items

Benefit Plan	*Selection	My Peers Chose	You Pay (Monthly)	Company Contribution (Monthly)	Credits (Monthly)
HMO	<input checked="" type="radio"/> Select <input type="radio"/> Waive	60%	\$91.00	\$160.00	\$25.00
POS	<input type="radio"/> Select <input checked="" type="radio"/> Waive	10%	\$93.00	\$212.00	\$25.00
f. PPO	<input type="radio"/> Select <input checked="" type="radio"/> Waive	30%	\$90.00	\$200.00	\$25.00

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

# Benefits features at-a-glance

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## Purge Dependents and Beneficiaries for Active Workers

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JIRA	HRBENDEP-2549
Setup effort	Setup required
Change impact	Enables benefits admins with an additional tool to manage benefits data

---

## Benefit Credit Offsets for Workday Payroll

---

JIRA	HRBENENROLL-12230
Setup effort	Setup required
Change impact	Now you can more easily offset the cost of a worker's benefit election either through an earning or deduction

---

## Contribution and Credit Frequencies

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JIRA	HRBENENROLL-12884
Setup effort	Automatically available
Change impact	This fix now correctly displays contribution and credit frequencies

# Absence and Time Tracking

# Presented by



Rosalie Toburen

Consulting Services Manager

# Change Job and Assign Work Schedule Impacts on Time Off

Workday enables you to configure Workday to automatically remove approved time off entries

## Reasons to consider this feature

- This feature improves efficiency by streamlining manual tasks and eliminating workarounds to identify ineligible time off entries or time off entries on invalid dates. It provides more accurate reporting data for Absence management

## What do I need to do

- Edit the Change Job and/or Assign Work Schedule business process and add the Remove invalid Time Off Entries After Job Change/Work Schedule Assignment service step after the Completion step
- After you add the service step for the first time, run the Evaluate and Process Events Impacting Absence task to run a background job immediately. Workday will then initiate the background job automatically every 15 minutes
- Because the "Remove invalid Time Off Entries" service step is initiating the "Correct Time Off" bp, you may need adjust your existing "Correct Time Off" bp to accommodate the change

<https://doc.workday.com/release-notes/en-us/abs/7036390.html>

# Change Job and Assign Work Schedule Impacts on Time Off, cont.

Workday enables you to configure Workday to automatically remove approved time off entries

## What happens if I do nothing

- The Change Job and Assign Work schedule business processes will continue to work as usual, with manual steps to ensure time offs are cleaned up if they are no longer valid

## Additional considerations

- If you have the Assign Work schedule as a sub process of the Change Job business process, consider if you need these new service steps in both business processes or just one or the other
- If you are currently using the "Update Time Off" subprocess on the Change Job business process, you may consider removing this step if you decide to integrate this new feature

<https://doc.workday.com/release-notes/en-us/abs/7036390.html>

# Change Job and Assign work schedule impacts on Time Off

As a part of this change, new report fields have been introduced to help aid in creating condition rules

Rule Conditions

Rule Usage



Rule Conditions 1 item

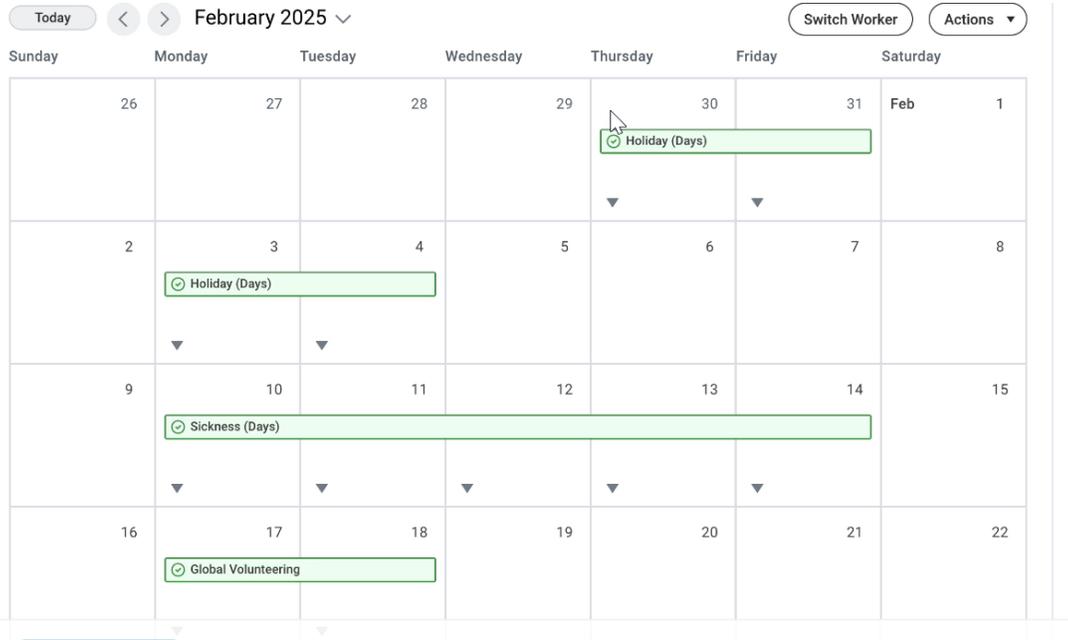


And/Or	(	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value	)
And		Initiating Business Process of Remove Invalid Time Off Entries Service	in the selection list	Value specified in this filter	Change Job	

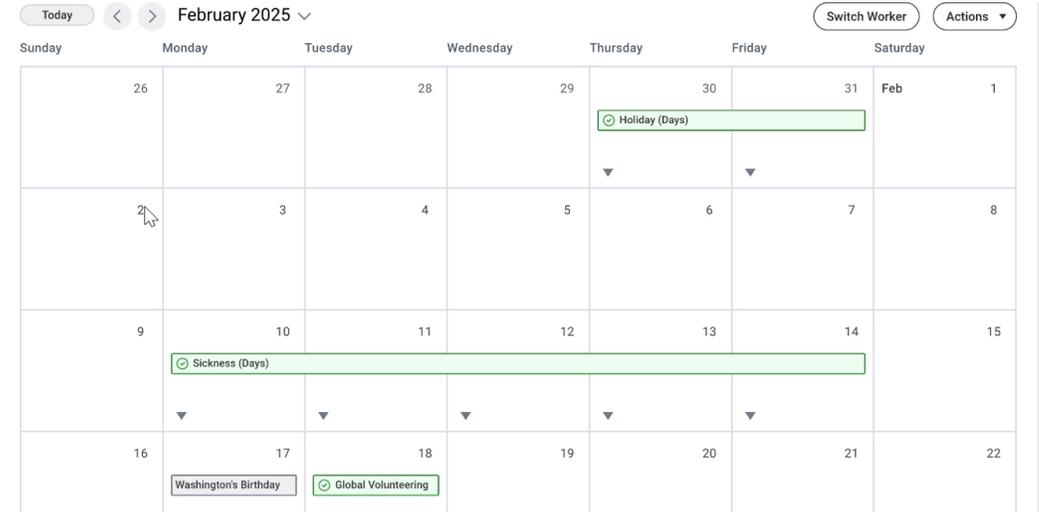
Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Change Job Impacts on Time Off – Before and After

## Remove Invalid Time Off Entries – Change job from UK on 2/1/25 - before



## Remove Invalid Time Off Entries – Change job TO US on 2/1/25 - after



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

# Workday Time Kiosk

Time Tracking customers can enable workers to check in and out on an iPad kiosk

## Reasons to consider this feature

- Workers can check in and out at a central location with the use of Apple iPads
- The Time Kiosk is available during Workday scheduled downtime so that workers can record time whenever they work
- This feature supports multi-position workers

## What do I need to do

- You can install the Workday Time Kiosk app on an iPad so that workers can check in and out on a common device
- Workday Time Kiosk integration requires an integration system user (ISU) and integration system security group (ISSG)
- Domain security will need to be altered to accommodate the new ISU and ISSG

<https://doc.workday.com/release-notes/en-us/time/8533365.html>

# Workday Time Kiosk, cont.

Time Tracking customers can enable workers to check in and out on an iPad kiosk

## What happens if I do nothing

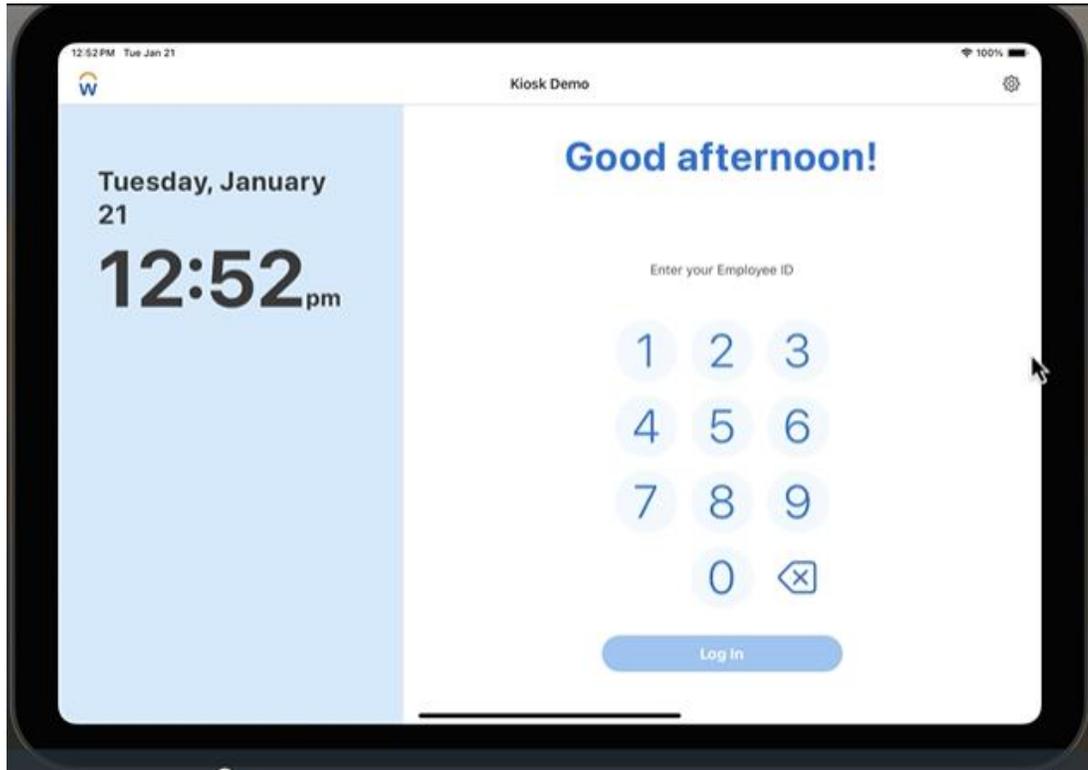
- You won't see any changes to Workday if you don't enable this feature

## Additional considerations

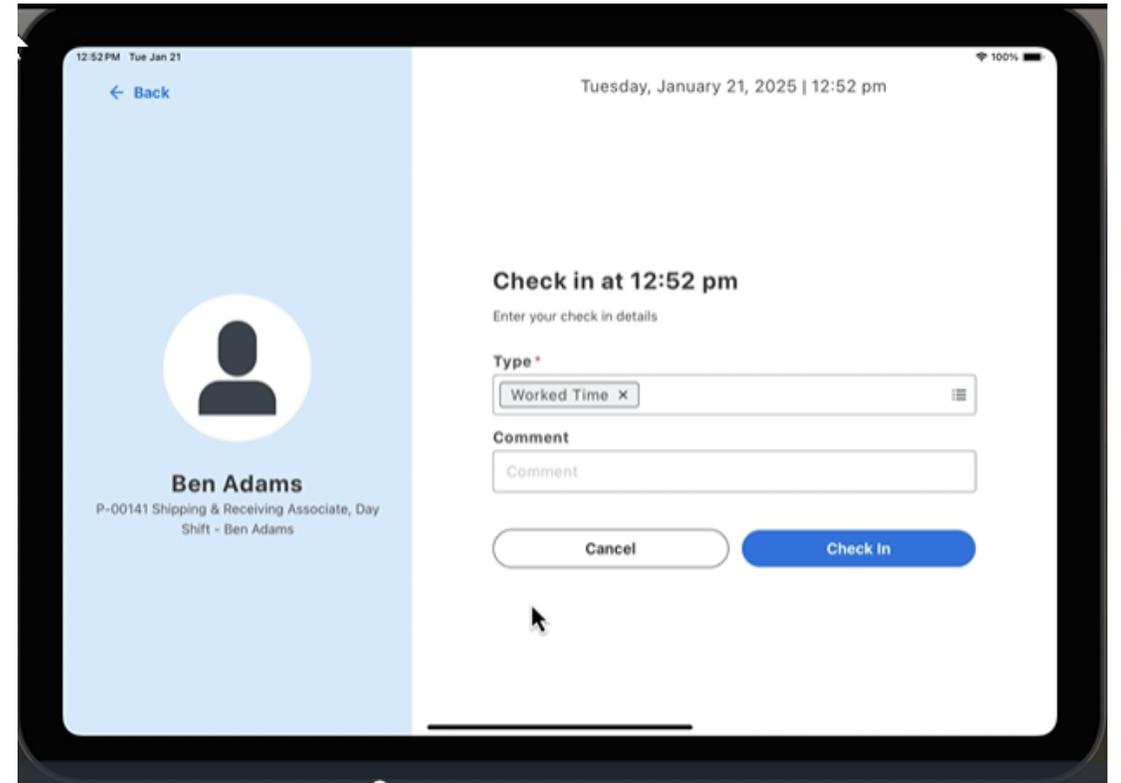
- Currently the only worktags considered for the time kiosk are the delivered worktags: location and cost center
- If other worktags are required to track time, the time kiosk currently does not support that functionality

# Workday Time Kiosk

## Home Screen



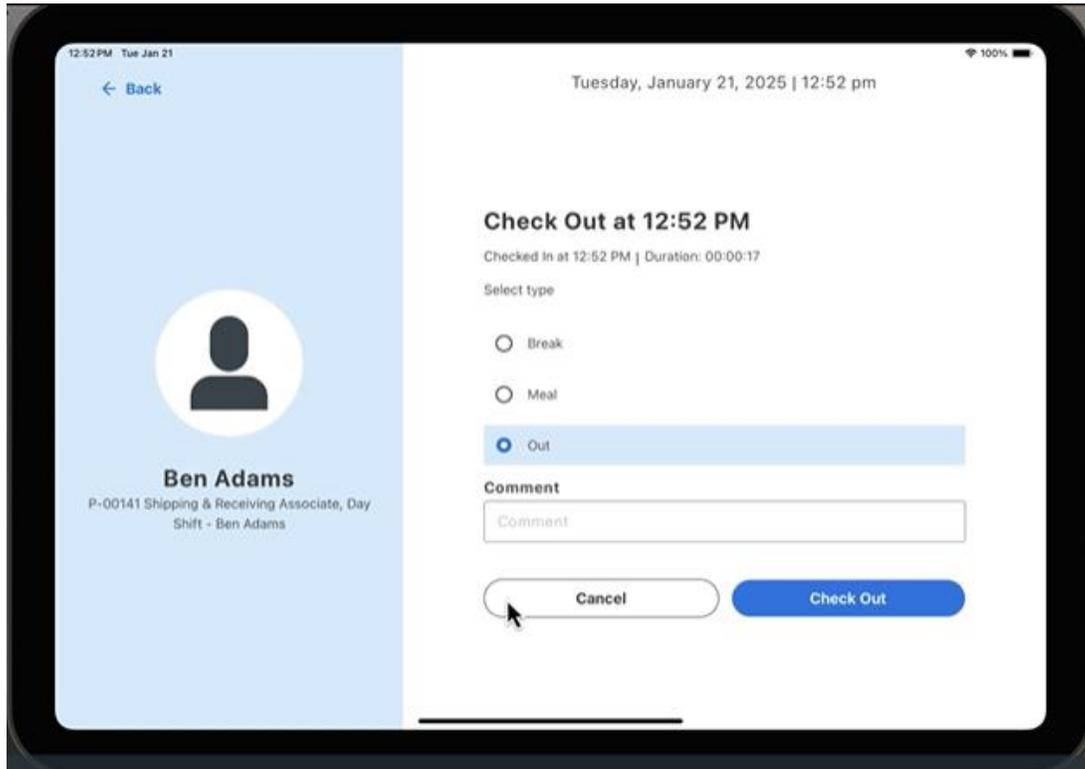
## Prompt to check-in



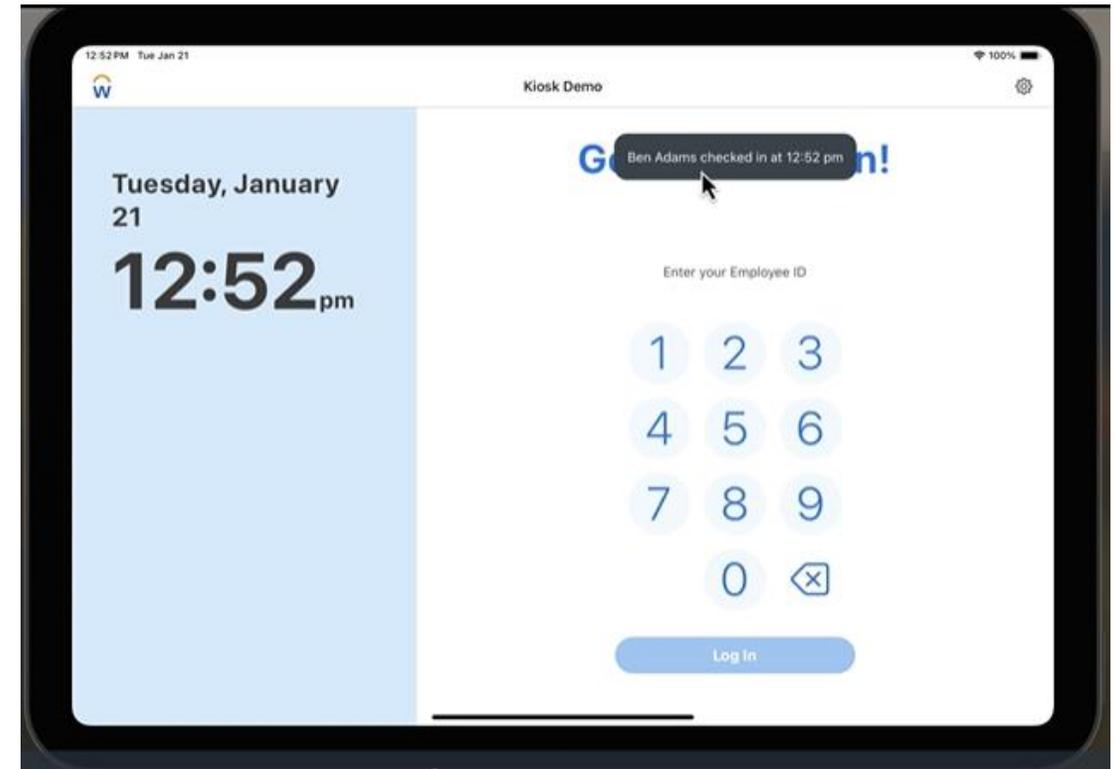
Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Workday Time Kiosk

## Prompt to check-out



## Confirmation of check in/out and immediate log out



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

# Effective Dating for Service Dates

Add effective dates to service date changes

## Reasons to consider this feature

- This feature enables you to accurately track service date changes for workers in Workday, reduces downstream impacts to calculations, and improves reporting

## What do I need to do

- To prepare for this feature delivering to Production in 2025R1:
  - 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

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

# Effective Dating for Service Dates, cont.

Add effective dates to service date changes

## 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.

## Additional considerations

- Keep in mind that there are additional service dates that can be utilized if a service date is used cross functionally, i.e. time off service date or benefits date

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

# Absence and Time Tracking features at-a-glance

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## Change Job Impacts on Time Off

JIRA	ABS-54713
Setup effort	Setup required
Change impact	Increased accuracy for time offs

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## Assign Work Schedule Impacts on Time Off

JIRA	ABS-54714
Setup effort	Setup required
Change impact	Increased accuracy for time offs

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# Absence and Time Tracking features at-a-glance, cont.

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## Effective Dating for Service Dates

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JIRA HRCORE-80339

Setup effort Setup required

Change impact Impacts will depend on cross functional policy on how often service dates will change effective dates

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## Workday Time Kiosk

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JIRA MOB-6119

Setup effort Setup required

Change impact Could impact decisions on whether 3rd party time clock vendor contracts are extended

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# Compensation

# Presented by



Yognidra Singh

CVS Consultant

# Total Rewards Template Conversion

Workday enables you to convert older Total Rewards templates to the new template format

## Reasons to consider this feature

- Workday makes it easier to adopt the new (Workday 2024R1 and after) template format and customize your Total Rewards Statements
- With this update, you can now:
  - Configure non-currency section groups to display values without specifying a currency symbol
  - Delete templates and sections
  - Add your organization's logo to the Total Rewards Statement using the 'Configure Tenant Branding' task
  - Include icons on section groups of your Total Rewards Statement

## 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
  - After you convert an older template to the new format, you must access the existing 'Edit Total Rewards Template' task to configure the template

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

# Total Rewards Template Conversion demo

## Convert Total Rewards Template

### Convert Total Rewards Template to New Template

The task was completed successfully.

**Converted Template**    Executive Management - Converted

**New Template**        Executive Management - New

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

# Total Rewards Template Conversion demo, cont.

## Non-Currency Section Groups

The image shows two screenshots illustrating the conversion of a non-currency section group in a Total Rewards template.

**Left Screenshot (Configuration Interface):**

- Total Rewards Rule:** Includes a filter for "Pay Group Country = United States".
- Disclaimer Text:** A rich text editor with a toolbar (Normal, Bold, Italic, Underline, Text Color, Bulleted List, Numbered List, Link, Unlink).
- Display Stock:** A checkbox that is currently unchecked.
- Rounding Rule:** A dropdown menu.
- Items Table:** A table with 5 items. The first item is "Benefits" with a checked "Do Not Sum" box and a checked "Non-currency" checkbox. A red box highlights the "Non-currency" checkbox.

**Right Screenshot (User-Facing View):**

- Navigation:** Tabs for "Compensation", "~Total Rewards~", "Estimated Annual Compensation", and "Pay Change History".
- Summary Card:** A card for "Benefits" showing a value of "6,660" and a "View Details" link. A red box highlights this card, and a red arrow points from the "Non-currency" checkbox in the configuration interface to this card.
- Other Card:** A card for "Dental" showing a value of "\$7,330" and a "View Details" link.

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

# Total Rewards Template Conversion demo, cont.

## Organization Logo/ Banner

The image displays two overlapping screenshots from a web application. The background screenshot shows the 'Configure Tenant Branding' page. On the left is a navigation menu with 'System Admin' and 'Branding' selected. The main content area has a red box around the title 'Configure Tenant Branding'. Below it are tabs for 'General' and 'Other'. Under 'Desktop and Mobile Web', there are two sections: 'Branding Logo' (0 items) and 'Branding Banner' (1 item). The 'Branding Banner' section contains a table with one row: 'Order', 'Branding Rule', and a file upload area showing 'gms-banner-2-1920x366.jpg'. A red box highlights this file name. The foreground screenshot shows a user profile for 'Chief Executive Officer' and a 'Total Rewards' summary card. The card displays '\*\*\*\*\*' and 'Total Value Annually'. A red arrow points from the 'gms-banner-2-1920x366.jpg' file in the branding settings to the masked area on the summary card.

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

# Total Rewards Template Conversion demo, cont.

## Icons on Section Groups

5 items

	Order	*Section Group Title	Do Not Sum	Icon	Non-currency		Order
+ -	▼ ▼	Base Pay	<input type="checkbox"/>	<div style="border: 1px solid red; padding: 2px;">Search</div> <ul style="list-style-type: none"><li><input type="radio"/> Bank</li><li><input type="radio"/> Calendar</li><li><input type="radio"/> Car</li><li><input type="radio"/> Glasses</li><li><input type="radio"/> Hand + Heart</li><li><input type="radio"/> Heart</li><li><input type="radio"/> Legal</li><li><input type="radio"/> Paw</li><li><input type="radio"/> Person</li></ul>	<input type="checkbox"/>	+ -	▼ ▼
+ -	▲ ▼	Allowances	<input type="checkbox"/>		<input type="checkbox"/>	+ -	▼ ▼
+ -	▲ ▼	Incentive Pay	<input type="checkbox"/>		<input type="checkbox"/>		

OK Cancel

Compensation -Total Rewards- Estimated Annual Compensation Pay Change History Reimbursable Allowance Plan Activity Employee Compensation Analysis More

\$\*\*\*\*\*  
Total Value Annually



 **\$294,580**  
Base Pay  
[View Details](#)

 **\$67,800**  
Allowances  
[View Details](#)

 **\$103,100**  
Incentive Pay  
[View Details](#)

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

# Total Rewards Template Conversion, cont.

Workday enables you to convert older Total Rewards templates to the new template format

## What happens if I do nothing

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

## Additional considerations

- 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>

# Increased Flexibility for Compa-Ratio and Position in Range Fields

Improved user experience for displaying the Compa-Ratio and Position in Range fields when assigning compensation

## Reasons to consider this feature

- Workday makes it more intuitive to control the display of compensation package analytics
- Prior to 2025R1, you could not control whether the Position in Range displayed via Maintain Compensation Package Analytics

## What do I need to do

- 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>

# Increased Flexibility for Compa-Ratio and Position in Range Fields Demo

## New Control or Checkbox for Position in Range:

- Now with the 2025R1, you can choose whether to display Position in Range per package, just like Compa-Ratio
- Hide Analytics option has been removed

### Edit Compensation Package Analytics

Management  

#### Pay Range Display Options

Display Total Base Pay Range	<input checked="" type="checkbox"/>
Display All Segments for Total Base Pay Range	<input type="checkbox"/>
Display Total Base Pay Range Segment for Worker	<input type="checkbox"/>
Display Primary Compensation Basis Range	<input checked="" type="checkbox"/>
Display All Segments for Primary Compensation Basis Range	<input checked="" type="checkbox"/>
Display Primary Compensation Basis Pay Range Segment for Worker	<input checked="" type="checkbox"/>
Display Midpoint	<input checked="" type="checkbox"/>

#### Guidelines Warnings

Based On Total Base Pay Pay Range

Based On Primary Compensation Basis Pay Range

#### Pay Range Analytics

Display Position in Range	<input checked="" type="checkbox"/>
Display Compa-Ratio	<input checked="" type="checkbox"/>

# Increased Flexibility for Compa-Ratio and Position in Range Fields, cont.

Improved user experience for displaying the Compa-Ratio and Position in Range fields when assigning compensation

## What happens if I do nothing

- Existing configuration is maintained via conversion - 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

## Additional considerations

- If you utilize the web service at all, it is highly recommended to utilize the new version of the web service
- Configure Optional Fields options for Position in Range still apply – if you want to display Position in Range per package, but would like to hide it from specific groups, you can still do so

# Minimum Wage in Compensation

Workday makes it easier to meet minimum wage requirements for hourly workers

## Reasons to consider this feature

- The new functionality provides:
  - The tools to help you become compliant with minimum wage rates and requirements for hourly workers
  - Administrative Simplification – simplify administrative processes by automatically updating minimum wage assignments when rates change, eliminating the need for manual plan maintenance and complex grade and grade profile configurations
  - Accuracy – avoid manual user entry errors when assigning minimum wage
  - You can no configure hourly plans or mass update existing hourly assignments using:
    - Minimum wage rates maintained by Workday Payroll
    - A Flat Rate
    - A calculation

## What do I need to do

- 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

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

# Minimum Wage in Compensation : Payroll Authority Minimum Wage

Payroll delivered report showing minimum wage by region

All Payroll Authority Minimum Wages					
6 of 933 items				Minimum Wages	
Payroll Authority	Payroll Authority Type	Country	Country Region	Start Date	Value
San Francisco (California:San Francisco)	Payroll Local City Authority	United States of America	California	07/01/2024	18.67
				07/01/2023	18.07
				01/01/2023	16.99
Sunnyvale (California:Santa Clara)	Payroll Local City Authority	United States of America	California	01/01/2025	19.00
				01/01/2024	18.55
				01/01/2023	17.95

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

# Minimum Wage in Compensation Demo

New section for Minimum wage comes up during the 'Create Hourly Plan'.

Minimum wage checkbox changed to 'Enforce minimum wage'. If left unchecked, no error or alert will be triggered

**Create Hourly Plan**

**Details**

Effective Date: 07/01/2024

Inactive:

Plan Name: Hourly Plan (New)

Plan Description: This Hourly Plan assigns Minimum Wage based on data delivered by Workday in the Payroll Authority Minimum Wage tables.

**Plan Eligibility**

Eligibility Rules: [dropdown]

**Minimum Wage**

Minimum Wage: Payroll Authority Minimum Wage

Enforce Minimum Wage:

**Hourly Defaults**

Compensation Element: Base Pay

Currency: [dropdown]

Frequency: Hourly

**Process Eligibility**

Exclude from Merit:

A new minimum wage field appears during a compensation business process event which pulls in the recommended minimum wage amount from the 'Payroll Authority Minimum Wage' Report

**Add Hourly Plan Assignment**

Plan Name: Hourly Plan (New)

Total Base Pay Range: 8.00 - 16.50 - 25.00 USD Hourly

**Minimum Wage**: 18.67 USD Hourly

Amount: 18.67

Currency: USD

Frequency: Hourly

Plan Name	Assignment Details	Effective Date
(empty)	(empty)	(empty)
REMOVED Hourly	REMOVED 16.00-USD-Hourly	REMOVED 02/01/2023
Hourly		
Merit		
Plan Name	Assignment Details	Effective Date
Merit - Hourly	3.00% Annual	01/01/2016

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

# Minimum Wage in Compensation Demo Cont.

- Error appears if you have selected the 'Enforce Minimum Wage' checkbox and try to assign a lower rate, Workday blocks you from completing the event until you enter a compliant rate (equal to or greater than the minimum wage requirement)
- Error message appearing is Workday delivered and can be customized with a business process step validation

**Add Hourly Plan Assignment**

**Errors: 1** [View All](#)

**Plan Name**  
Hourly Plan (New)

**Total Base Pay Range**  
8.00 - 16.50 - 25.00 USD Hourly

**Minimum Wage**  
18.67 USD Hourly

**Amount \***  
17.67

**Error:**  
The amount entered must be greater than or equal to the minimum wage requirement for the hourly plan Hourly Plan (New).

**Currency**  
USD

**Add Plan Assignment**

**Hourly**

Plan Name	Assignment Details	Effective Date
(empty)	(empty)	(empty)
<b>REMOVED</b> Hourly	<b>REMOVED</b> 15.00 USD Hourly	<b>REMOVED</b> 02/01/2023

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

# Minimum Wage in Compensation, cont.

Workday makes it easier to meet minimum wage requirements for hourly workers

## What happens if I do nothing

- Workday works as in previous updates

## Additional considerations

- Only locations with Payroll Authority Minimum Wage tables can use the Workday-delivered rates option on hourly plans. This includes only for USA and Canada

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

# Maintain Minimum Wage Assignments

To maintain compliance with your minimum wage assignments, you can:

## Use the new Mass Operations Management type to schedule mass worker updates

- Run the Minimum Wage Audit for Worker Assignments Report to identify workers paid below the minimum wage requirement as set on the hourly plan and as of a specific date
- Upload the report into the MoM type 'Hourly Plan Assignment Updates for Worker by Position'.
- Schedule the report to run daily

## Set up Hourly Plan Adjustments

- To update new or existing assignments and plan defaults for one or more workers
- This task is applicable to only Hourly Plans configured with Custom Minimum Wage or no Minimum Wage

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

# Maintain Minimum Wage Assignments demo

## Set Up Hourly Plan Adjustment

### Set Up Hourly Plan Adjustment 616 191

Hourly Plan Texas Minimum Wage

Effective Date 02/24/2025

Event Name \*

Reason \*

Description

**Employees using Default**

Allowed Actions

[View Hourly Plan Usage](#)

Old Defaults 1 item

Custom Minimum Wage	Enforce Minimum Wage
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

New Defaults 1 item

Custom Minimum Wage	Enforce Minimum Wage	*Amount	*Currency
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="0"/>	<input type="text"/>

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

# Compensation features at-a-glance

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## Total Rewards Template Conversion

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JIRA	HRCOMP-56718, HRCOMP-56927
Setup effort	Setup required
Change impact	Up-to-date Total Rewards Templates and sections and improved user experience

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## Increased Flexibility for Compa-Ratio and Position in Range Fields

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JIRA	HRCOMP-57614, HRCOMP-56384
Setup effort	Automatically available
Change impact	Improved user experience for displaying position in range during compensation assignments

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## Minimum Wage in Compensation

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JIRA	HRCOMP-56501
Setup effort	Setup required
Change impact	Maintain accurate and up to date compliance with the minimum wage requirements for hourly workers

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# Advanced Compensation

# Presented by



Valerie Dickson

CVS Functional Architect

# Infinite Scrolling on Compensation Review Grid

Workday makes it easier to review compensation for large organizations by enabling infinite scrolling for any grids with over 50 rows and no sub-grids (only 1 plan per employee, per award type).

## Reasons to consider this feature

- Increases the number of rows that are viewable in the grid or a search report.
- Workday displays the compensation review grid for the first group of 50 rows. You can configure how many rows Workday displays on subsequent groups.
- Workday enables infinite scrolling on the compensation review grid (inbox task) and in the Search report(s) when all employees in the organization are assigned no more than 1 plan of the same plan type.

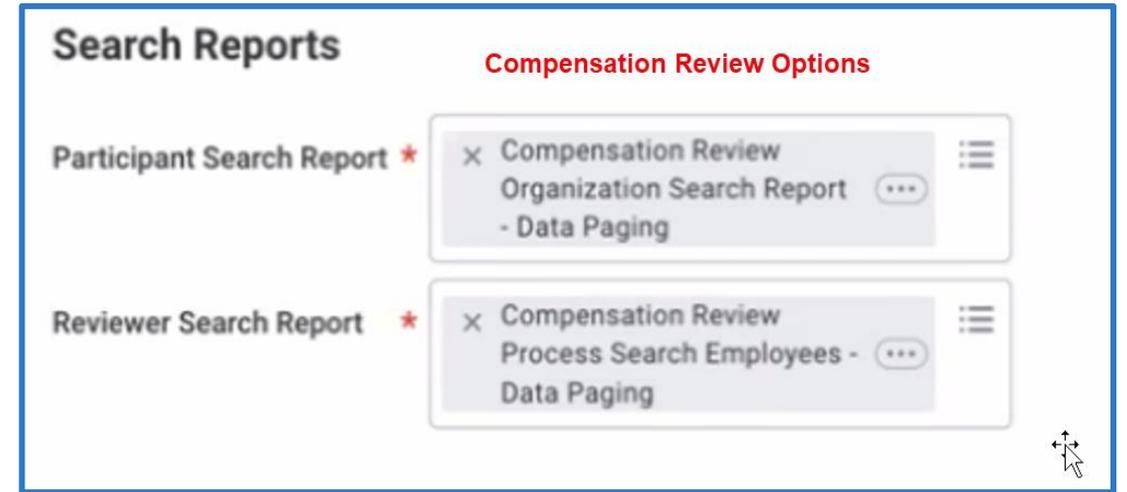
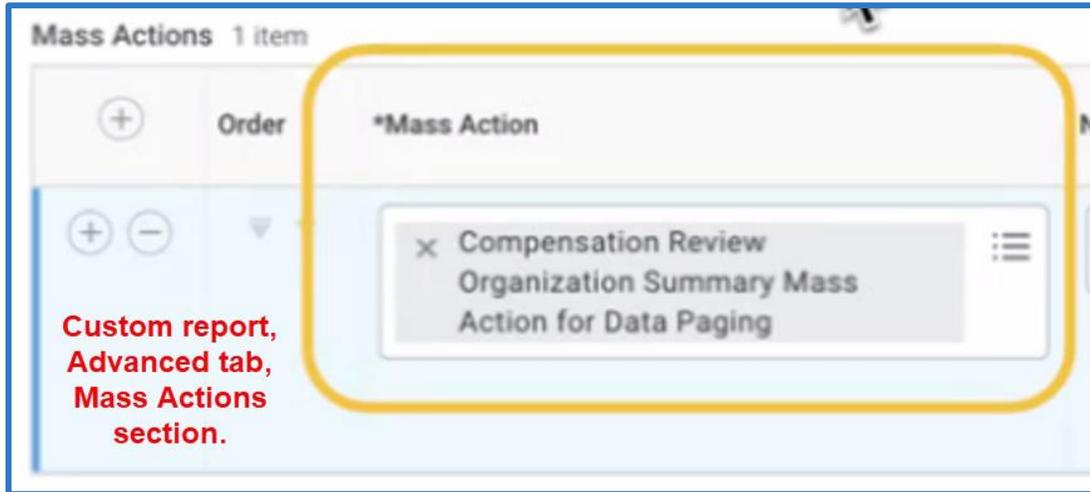
## What do I need to do

- Determine if you meet the criteria that all employees in the organization are assigned **no more than 1 plan of the same plan type.**
- If you meet the criteria,
  - Increase the limit on the Preferred Compensation Review Employee Awards Grid Limit > Edit Tenant Setup - HCM task up to 2000.
  - Copy the standard Search reports to enable data paging which will allow the increase in number of employees you can view.
  - Add the new Search reports to your Compensation Review Options.

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

# Infinite Scrolling on Compensation Review Grid

## Steps to enable Infinite Scrolling



Default Compensation Review Employee Awards Grid Limit	100
Preferred Compensation Review Employee Awards Grid Limit	<input type="text" value="2000"/> <span>?</span>

**Edit Tenant Setup - HCM**

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

# Infinite Scrolling on Compensation Review Grid

Not available if workers have more than one plan of the same type in the event.

## Criteria - My Tasks

Employee	Current Performance Rating	Warnings	Target Bonus %	Actual Bonus %	Non Discretionary Bonus Amount	Discretionary Bonus Amount	Proposed Discretionary Bonus Amount	Total Target	Total Bonus	Bonus Notes
P-00212 Senior HR Representative   73,864.00	3 - Meets Expectations		5.50%	7.75%	\$3,693.20 \$2,674.55	\$2,031.26 \$1,471.00	2,031.00 1,470.81	5,724.00	5,724.00	
			4.13%	5.81%	\$2,789.90 \$2,005.91	\$1,523.45 \$1,103.25	1,523.00 1,102.93	4,293.00	4,293.00	
P-00172 Staff HR Representative   33.00	Meets Expectations		5.75%	7.87%	\$5,011.65	\$2,881.70	2,881.00	7,893.00	7,893.00	
			8.63%	11.81%	\$7,517.48	\$4,322.55	4,323.00	11,840.00	11,840.00	
P-00173 Staff HR Representative   99,169	3 - Meets Expectations		5.50%	7.75%	\$4,000.45	\$2,727.15	2,728.00	7,686.00	7,686.00	
			8.70%	11.67%	\$7,407.65	\$4,400.00	4,400.00	11,807.65	11,807.65	

**For My Tasks:**  
**NO sub-grids in the organization or sub-orgs**

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

# Configurable Visibility of Pools and Budget Wheels

Workday enables you to hide compensation review pool and budget wheel graphics from target populations of compensation review users by security group.

## Reasons to consider this feature

- Flexibility to hide pool and budget wheels from specific security groups during a Compensation Review event.
- New security domain, **View Compensation Review Pool Data** in the Advanced Compensation functional area controls visibility of pool and budget wheels.
- Budget wheels and budget data are also hidden on:
  - ✓ Compensation Review Budget Pools report
  - ✓ Compensation Review Status Report
  - ✓ Compensation Review Status Report by Hierarchy

## What do I need to do

- Workday assigns current security groups that have access to view pool data and budget wheels to the new domain to maintain your current access.
- Edit the new security domain, **View Compensation Review Pool Data** to remove security groups that should not view pool data and budget wheels in the Compensation Review event.

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

# Configurable Visibility of Pools and Budget Wheels

View Compensation Review Pool Data view with budget wheels visible



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

# Configurable Visibility of Pools and Budget Wheels

View Compensation Review Pool Data view with budget wheels hidden

## Compensation Review - Manager

Created: 01/13/2025 | Effective: 01/31/2025

Propose Awards: Compensation Review; FY25 Compensation Review

### Compensation Planning

Autofill | Process Preferences | View Full Screen | Reports

No Filters Applied | Saved Filters: select one

Employee	Current Performance Rating	Warnings	Total Base Pay	Merit Target	Merit Increase %	Merit
P-00427 Customer Service Representative   \$3,070.00	5 - Outstanding Performance		\$83,070.00	5.50%	5.5002%	
	4 - Exceeds Expectations		\$87,780.00	3.50%	3.4997%	

Base Pay Range: 70,000.00 - 97,500.00 - 125,000.00 USD Annual  
Pay Range Segment: Q1  
Internal Benchmark Av...  
812 000.00

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

# Individual Target Improved User Interface for Funded Plans

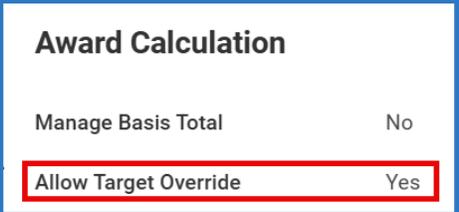
Workday makes it more intuitive when assigning compensation plan targets during a compensation change using the enhanced user interface first delivered with Workday 2024R1.

## Reasons to consider this feature

- Better user interface when assigning individual targets for funded compensation plans, i.e., merit, bonus, and stock that allow target overrides.
- New fields, **Plan Target** and **Specify Target Override** options in the Compensation Plan task.
- Automatically defaults the selection to **Plan Target**, unless there is an **Individual Target** specified.
- If the plan design does not Allow Target Overrides Workday displays only the Plan Target option.

## What do I need to do

- The funded compensation plan design must include Allow Target Override = Yes



The screenshot shows a form titled "Award Calculation" with two rows of fields. The first row is "Manage Basis Total" with a "No" value. The second row is "Allow Target Override" with a "Yes" value. The "Allow Target Override" row is highlighted with a red border.

Award Calculation	
Manage Basis Total	No
Allow Target Override	Yes

- You must be using business process templates with the Enhanced User Interface functionality enabled.
  - ✓ Change Job
  - ✓ Hire
  - ✓ Request Compensation Change
- You will not see this feature if you are **not** using business process templates with Enhanced User Interface enabled.

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

# Individual Target Improved User Interface for Funded Plans

Workday makes it more intuitive and intentional when assigning compensation plan targets during a compensation change.

## Before

Compensation Plan	Bonus Percent (% of Total Comp)
<b>Individual Target %</b>	<input type="text" value="0"/>
Guaranteed Minimum	<input type="checkbox"/>
Frequency	Annual
▼ <b>Additional Details</b>	
Compensation Element	Incentive
% Assigned *	<input type="text" value="100"/>
Actual End Date	<input type="text" value="MM/DD/YYYY"/>
Compensation Basis	Total Compensation
Plan Target	10.00%
Currency	USD
Frequency	Annual
Assignment Details	10% Annual

## After

<b>Bonus</b>	
Plan Name	Non-Management Bonus Plan
<input type="radio"/> Plan Target: 15%	
<input checked="" type="radio"/> <b>Specify Target Override</b>	
<b>Individual Target %</b>	<input type="text" value="17"/>
Guaranteed Minimum	<input type="checkbox"/>
Frequency	Quarterly
> <b>Additional Details</b>	
Assignment Details	17% Quarterly: Individual Target
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>

# Propose Compensation Hire as Sub-step of Hire

Workday makes it easier to propose compensation for new hire.

## Reasons to consider this feature

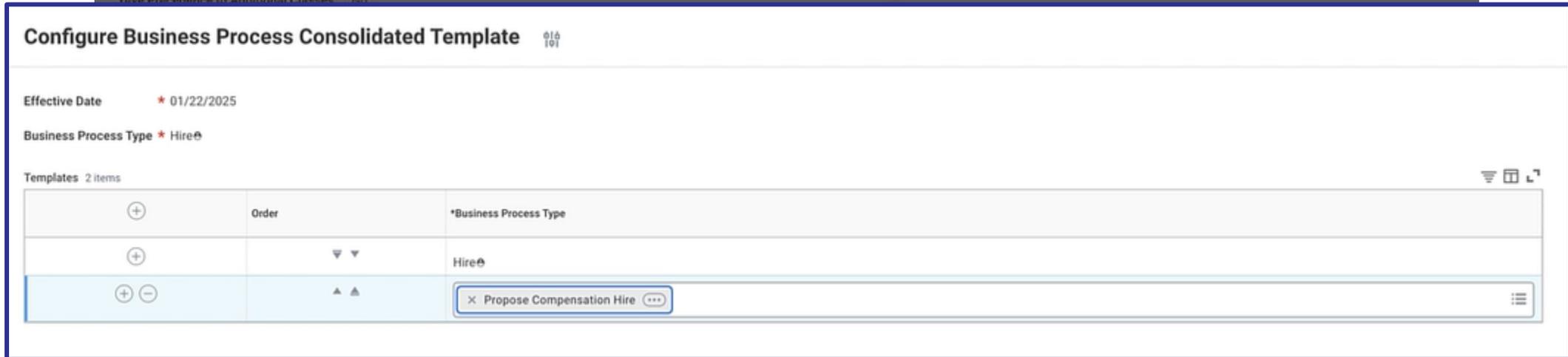
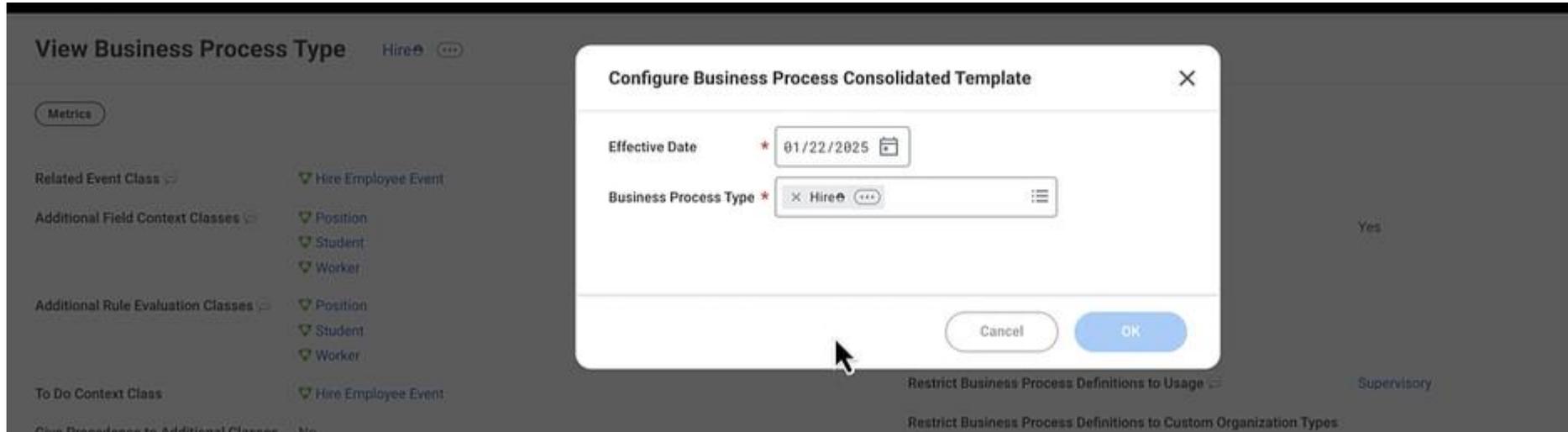
- The *Propose Compensation Hire* business process can now be used as a step within the *Hire* business process.
- With the enhanced user interface for *Hire* delivered in 2024R2, you can now propose compensation when hiring a new employee.
- Creates a more complete view that includes Hire compensation for the business process initiator.

## What do I need to do

- You MUST use business process templates and enable the Enhanced User Interface.
- 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

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

# Propose Compensation Hire as Sub step of Hire demo



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

# Advanced Compensation features at-a-glance

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## Infinite Scrolling on Compensation Review Grid

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JIRA	HRCOMPREV-31811
Setup effort	Automatically available
Change impact	Makes it easier to review compensation for large organizations by enabling infinite scrolling for any grids with over 50 rows and no subgrids

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## Configurable Visibility of Pools and Budget Wheels

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JIRA	HRCOMPREV-30914
Setup effort	Setup required
Change impact	Communicate the change to impacted user populations before uptaking this enhancement if removing visibility

---

# Advanced Compensation features at-a-glance

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## Individual Target Improved User Interface for Funded Plans

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JIRA	HRCOMP-57934
Setup effort	Setup required
Change impact	Communicate the user experience change to impacted users if you plan to uptake this feature

---

## Propose Compensation Hire as Sub-step of Hire

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JIRA	HRCOMP-57204
Setup effort	Setup required
Change impact	Communicate the user experience change to impacted users if you plan to change the Hire BP to include proposing compensation as a substep

---

# Learning

# Presented by



Esti Kovalchuk

CVS Consultant

# Engagement Builder/Next-Gen Campaigns

Create and manage audiences and engagements from a centralized workspace with improved search and filtering.



## Audience Builder

*to replace the "Create Audience" task*



## Message Builder

*to replace Message Templates and Email Templates*



## Engagement Builder

*to replace Campaigns*

# Audience Builder

Define audiences with Workday data, confidently, without a report writer.

## Reasons to consider this feature

- **Intuitive Interface:** Easy to use for any administrator.
- **Segments and Exceptions:** Build your audience to target multiple groups and isolate recipients to include or exclude regardless of conditions.
- **On-the-fly Preview:** See the results of your audience conditions as you build them.
- **Data Export:** Export audience snapshots to Worksheets for collaboration.

## What do I need to do

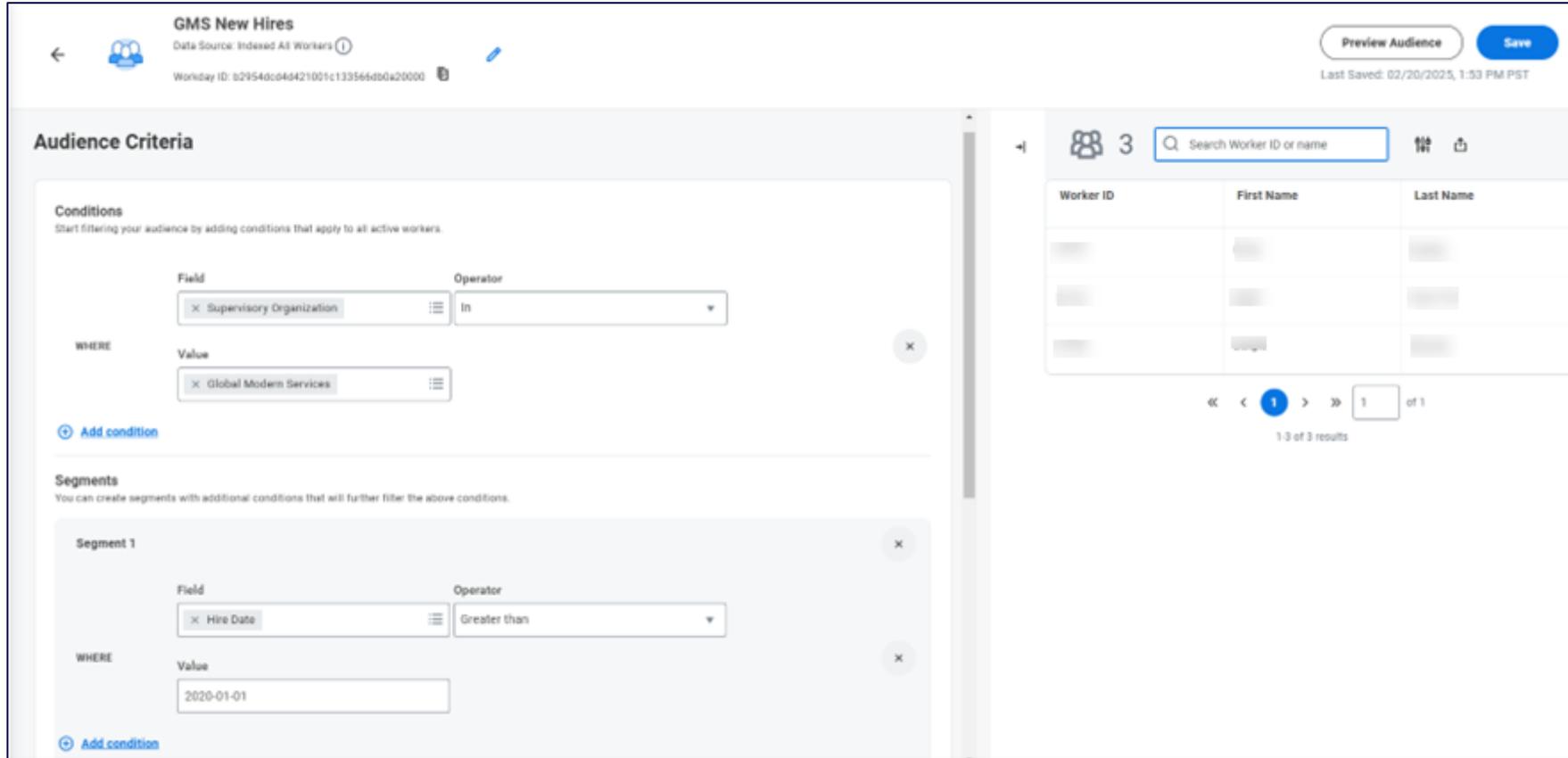
- Engagement Builder is available in Preview for all HCM customers.
- You can continue to use legacy Campaigns if you do nothing.

<https://doc.workday.com/release-notes/en-us/camp/8678565.html>

# Audience Builder demo

## Create Audience Task

Create Next Generation Audience 



The screenshot shows the Audience Builder interface for a task named "GMS New Hires". The data source is "Indexed All Workers" and the Workday ID is "b2954dc046421001c133566db0a20000". The interface is divided into two main sections: "Audience Criteria" and a results table.

**Audience Criteria**

**Conditions**  
Start filtering your audience by adding conditions that apply to all active workers.

Field: Supervisory Organization | Operator: In | Value: Global Modern Services

**Segments**  
You can create segments with additional conditions that will further filter the above conditions.

Segment 1: Field: Hire Date | Operator: Greater than | Value: 2020-01-01

**Results Table**

Worker ID	First Name	Last Name
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]

Navigation: 1 of 1 results, 1-3 of 3 results

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

# Engagement Builder demo

## Create Audience Task

### Segments

You can create segments with additional conditions that will further filter the above conditions.

**Segment 1** ✕

Field:  Operator:

WHERE Value:

[+ Add condition](#)

[+ Add segment](#)

### Individual Exceptions

Third, you can identify individual exceptions to manually include in or exclude from the audience.

REMOVE  ✕

[+ Add a person](#)

→ 3  🔍 📄 📤

Worker ID	First Name	Last Name
...	...	...
...	...	...
...	...	...

« < **1** > »  of 1

1-3 of 3 results

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

# Message Builder

Create engaging, personalized, and multichannel messages.

## Reasons to consider this feature

- **Easier Email Branding:** Integration with Notification Designer comes built-in.
- **Rich Text Editing:** Compose your message content using rich-text capabilities to let your content shine.
- **Preview On-the-fly:** Compose your message in a preview of the channel and branding.
- **Generative AI:** Leverage the power of generative AI to enhance your message content.

## What do I need to do

- Engagement Builder is available in Preview for all HCM customers
- You can continue to use legacy Campaigns if you do nothing.

<https://doc.workday.com/release-notes/en-us/camp/8678565.html>

# Message Builder demo

## Add New Message

The screenshot displays the 'Add New Message' interface. On the left, there is a sidebar with 'Content Templates' and 'Channels'. Under 'Content Templates', a 'Notification Template (Email)\*' is selected, showing 'Notification GMS Demo Template'. Under 'Channels', an 'Email' channel is visible. The main area contains form fields for 'From Display Name' (GMS Learning), 'Reply To', and 'Subject' (Required Learning). Below these fields is a rich text editor toolbar with icons for undo, redo, font size (14), bold, italic, underline, text color, bulleted list, numbered list, link, and unlink. The preview area shows a white card with a blue lightbulb icon containing a gear, labeled 'Your Logo'. Below the logo is a dashed box containing the text: 'Dear Worker,  
You have a new required learning assignment. If you have any questions, please reach out to the GMS learning team.' At the bottom of the card is a purple button labeled 'View Learning Content'.

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

# Engagement Builder

Create and manage audiences and engagements from a centralized workspace with improved search and filtering.

## Reasons to consider this feature

- **Easier Management:** A new workspace to search and manage Campaigns.
- **Simplified Content Creation:** Easily create assignments, communications and reminders in fewer steps.
- **Improved Performance:** Multiple times faster performance on large volume Campaigns.
- **Enhanced Observability:** Gain greater insights into performance and run time issues.

## What do I need to do

- Engagement Builder is available in Preview for all HCM customers
- You can continue to use legacy Campaigns if you do nothing.

<https://doc.workday.com/release-notes/en-us/camp/8678565.html>

# Engagement Builder demo

## Engagement Builder Workspace

The screenshot displays the Engagement Builder workspace. At the top, there is a navigation bar with a 'MENU' icon, the Cognizant logo, a search bar, and notification icons for chat, email (547), and another email (347). The main content area is titled 'Engagement Builder' and contains a section for 'All Engagements'. This section includes a 'Create Engagement' button, a search bar for engagements, and two scheduled run dates: '02/23/2025, 10:29 AM PST' (Last Scheduled Run) and '02/23/2025, 04:17 PM PST' (Next Scheduled Run). Below this is a table with the following data:

Name	Start Date	End Date	Audience	Type	Audience Count in Last Run	Errors in Last Run	More Actions
LRN-HR Data Privacy	2025-02-12	-	<a href="#">LRN: HR Audien...</a>	Learning Campaign	12	No	⋮

At the bottom of the table, there is a pagination control showing '1' of 1 results.

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

# Engagement Builder demo

## Create Engagement

The screenshot displays the 'GMS Demo' interface for creating an engagement. The main area is titled 'Required Learning Details' and contains the following fields:

- Send Condition \***: A date field set to 2025/02/20.
- What content do you want to assign as required learning?**: A section with two sub-fields:
  - Content Type \***: A dropdown menu currently showing 'Learning Course'.
  - Content \***: A tag field containing 'Agile Key Exam Concepts'.
- When do you want this required learning to be due?**: A section with two sub-fields:
  - Due Date is**: A text input field containing the number '3'.
  - Days**: A dropdown menu set to 'Days'.
  - after the assignment date**: Text following the dropdown.

At the bottom of the form are two buttons: 'Done' (in blue) and 'Cancel' (in white with a blue border).

**Left Sidebar:**

- Audience**: A 'Select Audience' button.
- Message**: A 'Default Message' card with 'Channels: Email' and an 'Edit Message' link.
- Dates**: Text indicating 'Engagement runs indefinitely from 2025-02-20' and a 'Change Dates' link.
- Details**: A section for 'Integration System User \*' with a dropdown showing 'Campaign System ISU'. Below this are three rows of key-value pairs:
  - Engagement Type: Learning Campaign
  - Engagement Category: Required Learning (Learning)
  - Exclusion Rule: Enabled

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

# Engagement Builder, cont.

## Additional considerations

- Configuration Prerequisites:
  - Access to the All Workers for Pre-Hires and Indexed: All Workers report data sources (RDS).
  - Security: Administer Audience domain in the Learning Core and System functional areas.
  - Security: Integration Security domain in the Integration functional area.
  - Set Up Integration System User (ISU) for Next Generation Campaigns.
  - Set Up Security for Notification Designer.
  - Security: Message Builder domain in the System functional area.
  
- Deprecation Dates:
  - No new campaigns can be built in the legacy framework starting in 2025R2.
  - Full campaign deprecation will be 2027R1.

<https://doc.workday.com/release-notes/en-us/camp/8678565.html>

# How we can help you get ready

## Engagement Builder

- Configuration Support
  - Engagement Builder, Audience Builder, and Message Builder prerequisite security
  - Integration System User (ISU) setup
  - Notification Designer setup and branded templates support
- Change Management Support

Contact your Engagement Manager or submit a case in Service Cloud today.

# Learning features at-a-glance

---

## Engagement Builder

JIRA	CAMP-6153
Setup effort	Setup required
Change impact	Both Engagement Builder and legacy campaigns functionalities are now available for use

---

## Message Builder

JIRA	CAMP-6153
Setup effort	Setup required
Change impact	Message Builder is now available for use as part of Engagement Builder

---

## Audience Builder

JIRA	CAMP-6153
Setup effort	Setup required
Change impact	Audience Builder is now available for use as part of Engagement Builder

# Payroll

# Presented by



Melissa Karn

CVS Consultant

# Request Payroll Inputs Business Process

Workday delivers a new Request Payroll Input business process

## Reasons to consider this feature

- Using a business process to manage payroll input requests helps improve accuracy and traceability, and enables you to audit payroll input data, providing operational efficiency and transparency in payroll management

## What do I need to do

1. Configure the relevant security groups on the Request Payroll Input Event business process security policy
2. Edit the business process definition. Ensure you add the Review Payroll Input Request for Worker task as an allowed action
3. As a requester, access the Request Payroll Inputs task to submit 1 or more payroll input requests for review
4. As a reviewer, access My Tasks to view payroll input requests pending review and approval

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

# Request Payroll Inputs Business Process, cont.

Workday delivers a new Request Payroll Input business process

## What happens if I do nothing

- If you do nothing, you can't use the Request Payroll Input business process, but you can still use existing tasks to add payroll inputs for workers

## Additional considerations

An update to your training materials may be required, depending on your role configuration for the business process

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

# Request Payroll Inputs Business Process demo

## Create the business process

**Create Business Process Definition (Default Definition)** ✕

---

Effective Date \*

Time Zone \*

Business Process Type \*

---

## Update the process policy and build process steps

**View Business Process Definition** Request Payroll Inputs (Default Definition) ⋮

Effective Date 02/12/2025 > Security Group Restrictions

Time Zone GMT-08:00 Pacific Time (Los Angeles)

Most Recent Used Date 02/12/2025

Business Process Steps
Notifications
Allowed Actions by Role
Allowed Services
Related Links
Available Rules & Fields

Business Process Steps 4 Items

Step	Order	If	Type	Specify	Optional	Group	All	Run As User	Due Date	Due Date Is Based On Effective Date	Complete
Q	a		Initiation		No						
Q	b	Approver NOT Initiator on Parent Process?	Approval		No	Manager (Unconstrained)					
Q	c		Approval		No	HR Administrator					
Q	d		Approval		No	Finance Administrator					Yes

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

# Request Payroll Inputs Business Process demo, cont.

Launch task and submit one or more payroll inputs

Request Payroll Inputs

+ Add

Click here to sort

- Adam Retention Bonus
- Joy Retention Bonus
- Ariana Retention Bonus

Worker \* Adam

Batch ID A Bonus Batch 2025

Special Entry

Pay Component \* Retention Bonus

Position \* P-00513 Staff Payroll Specialist

Company (empty)

Payroll Worktags

Payroll Input Lines 1 item

+/-	*Type	Value
-		500

Submit Cancel

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

# Request Payroll Inputs Business Process demo, cont.

View input via pay result as normal

**04/15/2024 (Regular) - In Progress**

Worker [Redacted]  
 Position P-00513 Staff Payroll Specialist - [Redacted]

### Result Details

Period [04/01/2024 - 04/15/2024 \(Semi-monthly\)](#)  
 Pay Group Detail [USA Semi-monthly Professional Regional \(Regular\)](#)  
 Company [Redacted] (USA)

### Payment Details

Payment Date 04/15/2024  
 Gross 3,004.87  
 Net 2,000.44  
 Pay Group Currency USD

### Status Details

Pay Calculation Status In Progress  
 Payroll Accounting Status Draft  
 Settlement Status Not Yet Started

[Add Payroll Input](#) [Previous Result for Worker](#) [View All Results](#)

Gross to Net    Additional Pay Components    **Payroll Input**    Pay Accumulations / Balances    Tax Elections    Payment    Actuals

Payroll Input 1 item



Payroll Input	Worker	Position	Start Date	End Date	Pay Component	Ongoing vs. One-time	Adjustment vs. Override	Run Category Type	Input Details		Last Updated
									Type	Value	
Q	[Redacted]	P-00513 Staff Payroll Specialist	04/01/2024	04/15/2024	Retention Bonus	One-time	Override	Regular	Amount	250.00	02/12/2025, 8:17:15.280 AM by [Redacted]

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

# Lock Pay Group for Auditing

Workday enables you to set up a pay group detail in a lock or unlock status

## Reasons to consider this feature

- Easily audit payroll results without having to recalculate before completing payroll due to worker-based events which cause results to flip to Requires Re-calculation

## 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

<https://doc.workday.com/release-notes/en-us/paywdcore/8714859.html>

# Lock Pay Group for Auditing, cont.

Workday enables you to set up a pay group detail in a lock or unlock status

## Edit tenant setup - Payroll

### Pay / Retro Calculations

#### Pay Calculations

Enable Continuous Payroll Calculation  ?

#### Pay Group Status Lock

Lock Pay Groups To Block All Pay Calculations on Payroll Results  

#### Proration

Pay Component Proration for Multiple Jobs  ?

#### Retro Calculations

Maximum Months Allowed For Retro Processing

## Run task: Update Pay Group Lock Status

### Update Pay Group Lock Status ✕

Select pay groups to lock or unlock. When locked, Workday doesn't automatically flip the In Progress on-cycle results within the pay group to Requires Re-calculation status due to worker-based events.

Select Action \*  Lock Pay Groups  
 Unlock Pay Groups

Pay Group Details \* 

- ✕ USA Semi-monthly Professional Regional: Regular (Semi-monthly) ⋮
- ✕ USA Semi-monthly Admin Regional: Regular (Semi-monthly) ⋮

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

# Lock Pay Group for Auditing demo

## Task result display

**Update Pay Group Lock Status**

When locked, Workday doesn't automatically flip the In Progress on-cycle results within the pay group to Requires Re-calculation status due to worker-based events.

Pay Groups Successfully Locked 0 items

Pay Group Detail	Current Period
No items available.	

Pay Groups Not Locked 1 item

Pay Group Detail	Current Period	Reason
USA Semi-monthly Professional Regional: Regular (Semi-monthly)	04/01/2024 - 04/15/2024 (Semi-monthly)	You can't lock the pay group until all on-cycle payroll results for the pay group are in an In Progress or Complete status.

## Run Pay Complete error

**Run Pay Complete**

Complete Criteria 1 Error

Prior Period

Next Period

Period \*  04/01/2024 - 04/30/2024 (Monthly)

### Error

1. Page Error

The pay groups you are processing aren't in a locked state. Lock the pay groups before you run pay complete again.(USA Monthly: Regular (Monthly))

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

# Lock Pay Group for Auditing demo, cont.

## Unlock to run a clean pay calculation

### Update Pay Group Lock Status

Select pay groups to lock or unlock. When locked, Workday doesn't automatically flip the In Progress on-cycle results within the pay group to Requires Re-calculation status due to worker-based events.

- Select Action \*
- Lock Pay Groups
  - Unlock Pay Groups

Pay Group Details \*

Search

USA Monthly: Regular (Monthly) ⋮

## Unlock confirmation

### Update Pay Group Lock Status



When locked, Workday doesn't automatically flip the In Progress on-cycle results within the pay group to Requires Re-calculation status due to worker-based events.

Pay Groups Successfully Unlocked 1 item



Pay Group Detail	Current Period
USA Monthly: Regular (Monthly)	04/01/2024 - 04/30/2024 (Monthly)

Pay Groups Not Unlocked 0 items



Pay Group Detail	Current Period	Reason
No items available.		

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

# Benefits and Pay Hub Enhancements

Workday updates the Benefits and Pay Hub to allow you to view relevant pay and benefits information

## Reasons to consider this feature

- 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
- Workday has indicated that they intend to retire the Pay Hub worklet with 2025R2

## What do I need to do

- Automatically available
- You can now disable the older Pay Hub

<https://doc.workday.com/release-notes/en-us/paywdcore/8324268.html>

# Benefits and Pay Hub Enhancements, demo

## Disable Pay Hub – Edit Tenant Setup - Payroll

### ▼ Payroll Administrator Results

Disable Payroll Result Profile  ?

Disable Pay Worklet  ?

## Benefits and Pay Hub new options

### Tasks and Reports

Withholding Elections

Payment Elections

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

# Benefits and Pay Hub Enhancements demo, cont.

## Withholding Elections

### Payroll Hub - Worker Tax Information

Federal Withholding Elections

State/Local Withholding Elections

## Payment Elections

### Payment Elections

Select how to receive payment for each type of pay. For direct deposit, be sure to add bank accounts before payment elections.

Person [redacted]  
Default Country United States of America  
Default Currency USD  
Status Successfully Completed  
Last Updated 01/31/2013 01:27 PM

Accounts 1 item

Account Nickname	Country	Bank Name	Account Type
[redacted]	United States of America	[redacted]	Checking

Add

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

# Payroll features at-a-glance

---

## Request Payroll Inputs Business Process

JIRA PAYEXP-162

Setup effort Setup required

Change impact Business Process workflow captured in Workday when configured

---

## Pay Group and Pay Component Summary Reports

JIRA PAYWDCORE-53617

Setup effort Automatically available

Change impact Automatically available reports assist with auditing payroll

# Payroll features at-a-glance

---

## Lock Pay Groups for Auditing

JIRA PAYWDCORE-53090, PAYWDCORE-52044, PAYWDRETRO-4922, PAYWDRETRO-5028, PAYWDACCT-33452

Setup effort Automatically available

Change impact Restrict payroll inputs while auditing for pay complete

---

---

## Benefits and Pay Hub Enhancements

JIRA PAYWDCORE-53053

Setup effort Setup required

Change impact Pay Hub worklet is going to be disabled WD2025R2, function is available in Benefits and Pay Hub

---

# People Experience

# Presented by



Maya Boudreau

CVS Consultant

# Journeys Security to Preview a Journey

Workday enhances Journeys Security by delivering two new security sub-domains

## Reasons to consider this feature

- This feature enhances security by providing granular control over access for creating condition rules and previewing journeys thus mitigating the risk of potentially exposing sensitive information

## What do I need to do

- Navigate to the Journeys functional area to enable security access
  - Configure permissions for the Manage: Journey Condition Rules domain
  - Configure permissions for the Manage: Journeys Preview domain
- Workday also recommends that you update your training material to note the changes

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

# Journeys Security to Preview a Journey, cont.

Workday enhances Journeys Security by delivering two new security sub-domains

## What happens if I do nothing

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

## Additional considerations

- Security groups on the new domains will also need either view or modify access to the Manage: Journey Builders domain
- Users with view permissions to the Manage: Journey Builders and Manage: Journeys Preview are still able to view journey templates, metrics, and options to create a journey

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

# Journeys Security to Preview a Journey demo

## Preview Journey View of the Journey Workspace

The screenshot displays the 'Journeys Workspace' interface. At the top, there is a navigation bar with a 'MENU' icon, a search bar containing 'journey', and notification icons for 25 messages and 270 alerts. The left sidebar shows 'People Experience Workspace' with 'Journeys' selected. The main content area features a 'Journeys Workspace' header and a dashboard with four key metrics: Distributed Journeys (561), Journeys Marked Complete (2%), Average Days to Complete (413), and Users with Journeys in Progress (11). Below this is a table titled 'All Journeys' with 33 entries. A 'Preview' dropdown menu is open over the first row of the table.

Journey Name	Journey Category	Last Modified	Last Modified B	Last Distributed
Building Belonging	Building Belonging	March 2, 2023	READY	March 19, 2021

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

# Tasks and Reports in Search

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

## Reasons to consider this feature

- These improvements enable users to access tasks that are relevant to their search query more quickly. By supporting improved natural language processing, users can more easily search in Workday

## 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 And Data Selection Opt In task
  - Select People Experience: Workday Assistant and click Next
  - Opt in to the People Experience: Workday Assistant: Task and Report Data data selection and click Next
  - Click OK

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

## Tasks and Reports in Search, cont.

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

### What happens if I do nothing

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

### Additional considerations

- Workday Assistant can rank and display up to five (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
- Search Assistance summaries only surface with Simplified Search on
- Workday can take up to one (1) week to fully ingest tasks and report data after opting in
- Workday plans to release functionality to auto-complete search queries (Safe Harbor applies)

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

# Tasks and Reports in Search demo

Workday Assistant supports Top Results and Task and Reports categories (with Simplified Search enabled)

The screenshot displays the Workday Assistant search interface. At the top left, there is a 'MENU' button and the Workday logo. A search bar contains the query 'how do I update my direct deposit'. To the right of the search bar are icons for chat, notifications, and a profile picture with a '2' notification badge. Below the search bar, a toggle switch indicates 'Simplified Search is Enabled'. A row of category buttons includes 'Top Results' (selected), 'People (0)', 'Tasks and Reports (0)', 'Articles (31)', and 'Learning (0)'. Below these is a dropdown menu for 'All Categories'. The main content area features a 'Workday Assistant' section with a purple star icon. It states 'Here is the best match for your ask:' followed by a 'Payment Elections' button. Below this, it says 'You might also be interested in:' followed by three buttons: 'Retirement Savings Elections', 'Bonus and One-Time Payment History', and 'Click to view in ADP'.

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

# Onboarding Experience on Workday Home

Workday enhances the functionality and usability of the Workday Home page by delivering an onboarding experience

## Reasons to consider this feature

- This enables employees to efficiently navigate the onboarding process with quick access through Workday Home

## 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

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

# Onboarding Experience on Workday Home, cont.

Workday enhances the functionality and usability of the Workday Home page by delivering an onboarding experience

## What happens if I do nothing

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

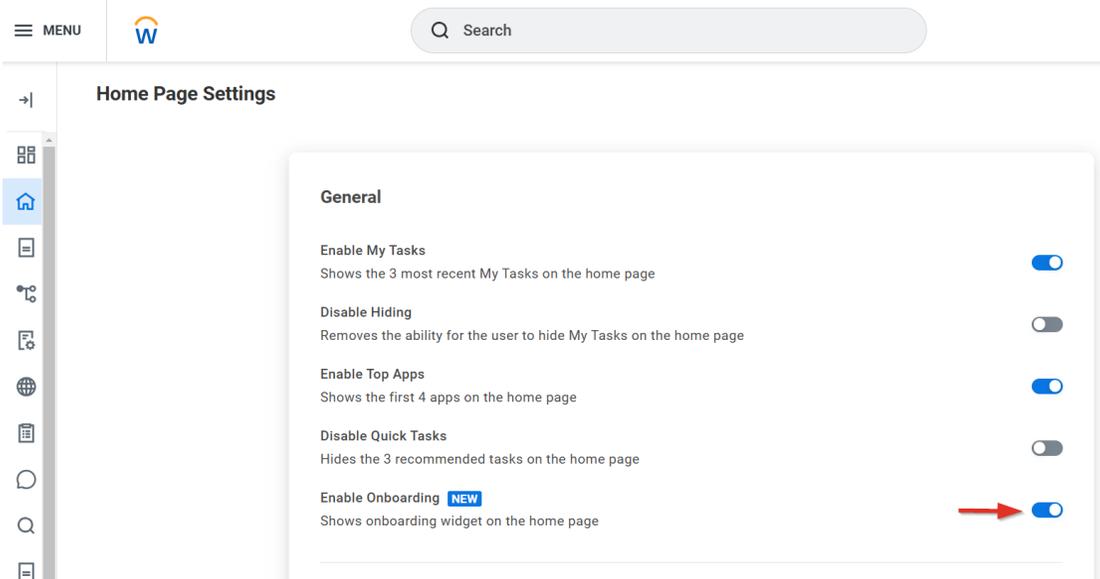
## Additional considerations

- Onboarding widget appears for all workers on the home page when there is an active Onboarding Plan
- The Onboarding widget cannot be relocated on the home page.
- There is no change to how tasks triggered from the Onboarding business process are delivered
- Onboarding Plan assignments are only available for Hire and Contract Contingent Worker business processes (within HCM)
- The Onboarding Dashboard can be disabled via Edit Tenant Steup – HCM

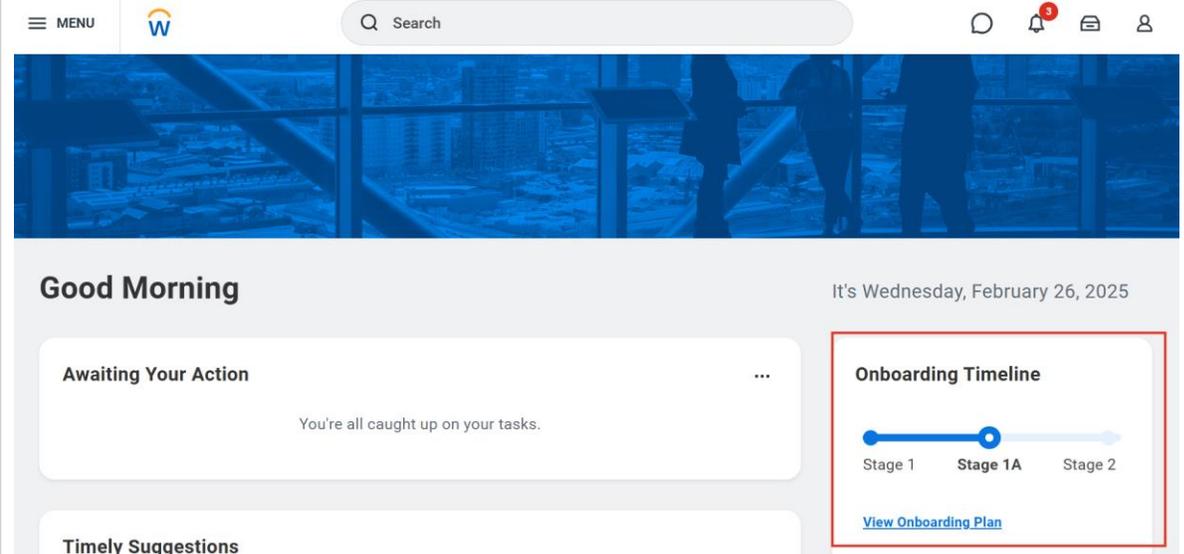
<https://doc.workday.com/release-notes/en-us/pex/8568957.html>

# Onboarding Experience on Workday Home demo

## Enable Onboarding on the Home Page Settings



## Onboarding Widget on the Home Page



# Onboarding Experience on Workday Home demo

Workday delivers a Day 1 Card template that can be configured with the most pertinent detail for workers on their first day.

### Create Onboarding Card 11/10

Name \*

Comment

6 Items

Name	Order	*Audience		Comment
Work Location	<input type="button" value="+"/>			
	<input type="button" value="+"/> <input type="button" value="-"/>	<input type="radio"/> Everyone <input type="radio"/> Audiences <input type="text" value=""/> <input type="radio"/> Audience Condition Rules <input type="text" value=""/>	<input type="checkbox"/> Manual Entry <input type="checkbox"/> External Field <span>*</span> <input type="text" value=""/> URL <input type="text" value=""/>	<input type="text"/>
First Day Start Time	<input type="button" value="+"/>			
	<input type="button" value="+"/> <input type="button" value="-"/>	<input type="radio"/> Everyone <input type="radio"/> Audiences <input type="text" value=""/> <input type="radio"/> Audience Condition Rules <input type="text" value=""/>	<input type="checkbox"/> Manual Entry <input type="checkbox"/> External Field <span>*</span> <input type="text" value=""/>	<input type="text"/>
Orientation Location	<input type="button" value="+"/>			
	<input type="button" value="+"/> <input type="button" value="-"/>	<input type="radio"/> Everyone	<input type="checkbox"/> Manual Entry	<input type="text"/>

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

# People Experience features at-a-glance

---

## Journeys Security to Preview a Journey

JIRA	JOURNEY-2056
Setup effort	Setup required
Change impact	Specific domains to separately secure journey condition rules and journey preview

---

## Tasks and Reports in Search

JIRA	PEX-25748
Setup effort	Setup required
Change impact	Top Results and Tasks and Reports search categories use Workday Assistant to recognize more queries and display up to five (4) of the top tasks and report specific to the user's search query

---

## Onboarding Experience on Workday Home

JIRA	PEX-25488
Setup effort	Setup required
Change impact	New onboarding plans, stages, content and audiences requiring set up

# Recruiting

# Presented by



Jan Harendran

CVS Principal Consultant

# New Workday Onboarding Experience

Allows you to send personalized and engaging content to new hires at defined stages of their onboarding period.

## Reasons to consider this feature

- Bridging a gap between Offer/Employment and hire
- Centralized Configuration, improved visibility and ability to create time-based stages aligned with Hire Date.
- Deliver target content to new hires in manageable stages, minimizing content information overload on date of hire.
- An opportunity for Recruiters/Onboarding specialists to create defined pre-boarding experience to candidates.

## What do I need to do

- Prerequisite: Recruiting customers only
- Enable following domains and add security groups to manage condition rules for Audiences and to preview plan assignment
  - Manage: Onboarding Audience Condition Rules
  - View: Onboarding Plans Preview
- Add Security: External pre-hire to Self-Service - Onboarding
- For Videos – signed Media Cloud Addendum to have media services enabled. Opt-In to Workday Media Cloud and sign the Workday Media Cloud Agreement
- Configure Onboarding planner and setup plans, audience, notification, content library, branding
- Configure Onboarding Service step to these business processes: Hire, Contract Contingent Worker, Employment Agreement, Offer

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

# New Workday Onboarding Experience, cont.

Allows you to send personalized and engaging content to new hires at defined stages of their onboarding period.

## What happens if I do nothing

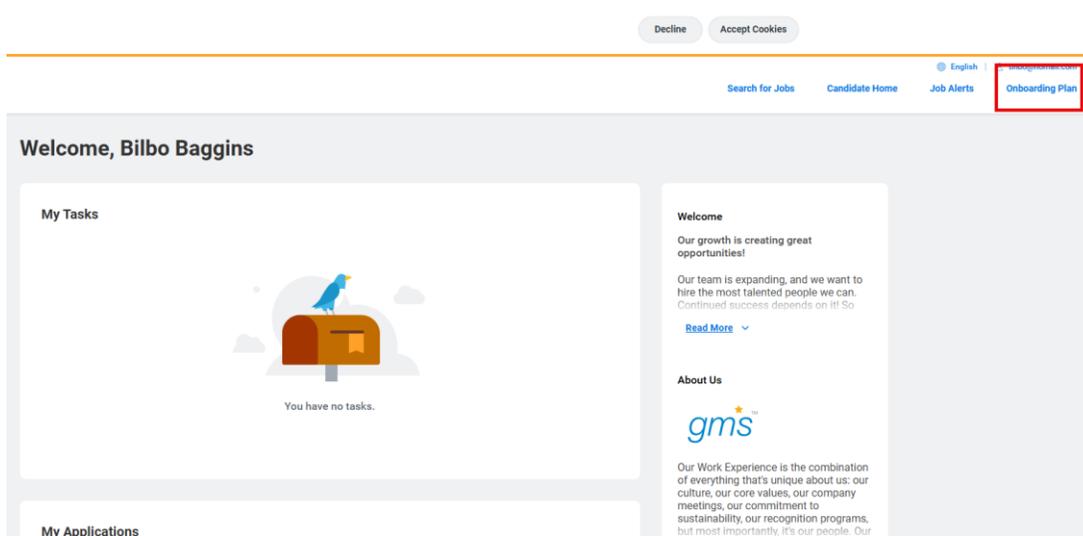
- Users with access to the Set Up: Onboarding domain will still be able to search and access existing Onboarding Dashboard

## Additional considerations

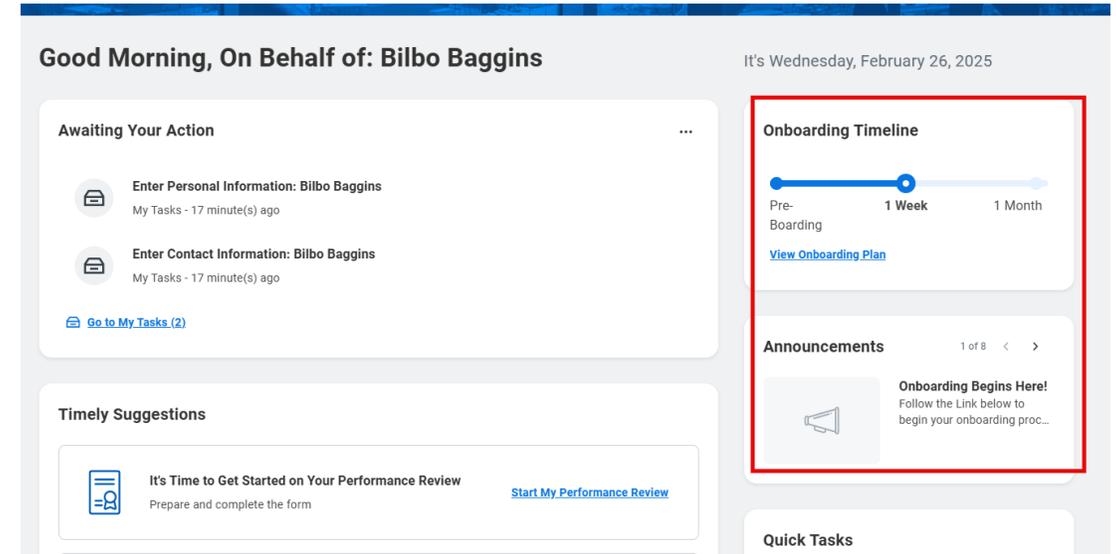
- **Disable Onboarding Dashboard check box** on Edit Tenant Setup – HCM task
- When unselected, Workday directs users to active Onboarding Plan assignment to the new Onboarding Plan homepage
- Users without an assignment will continue to see the existing Onboarding Dashboard
- When selected, Workday directs all users to the Onboarding plan homepage
- Retirement of existing Onboarding Dashboard TBD~ late 2026
- Messaging (Optional)

# New Workday Onboarding Experience demo

## Candidate home page



## Worker home page



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

# New Workday Onboarding Experience demo, cont.

## Onboarding Planner Setup

### Plan assignment report

Onboarding Plan Assignments

Show Active Only Yes Onboarding Plan Full Onboarding plan for GMS USA

1 item

Onboard Plan Assignments	Assigned To	Onboarding Plan	Version	Assigned On	Offset Date	Accessible Starting	Stage Reached	Next Stage Date	Started On	Initiated By Event	Active	Inactivated By Event	Inactivation Reason	Manually Assigned
...	Bilbo Baggins	Full Onboarding plan for GMS USA	Full Onboarding plan for GMS USA (02/11/2025-Ongoing)	02/14/2025 12:43:16.332 AM	02/24/2025	02/14/2025	Stage 1 for Full Onboarding plan for GMS USA (02/11/2025-Ongoing)	03/26/2025		Offer for Job Application: Bilbo Baggins - R-02716 Background Check Tester	Yes			

### Pre-boarding Content

Create Onboarding Content

Content Type \*

- Create Onboarding Announcement
- Create Onboarding Card
- Create Onboarding Message
- Create Onboarding Video

Cancel OK

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

# Non-US English Locals on External Career Sites

Candidates outside of United States can now enter dates in DD/MM/YYYY & YYYY/MM/DD aligns with date conversions.

## Reasons to consider this feature

- Intuitive job application process
- Respects regional language and date preferences and supports localization
- Minimizes errors during job application process

## What do I need to do

- Edit external career site> from the Language prompt> Select English (United Kingdom) and English (Canada)

[INSERT link to release note]

## Non-US English Locals on External Career Sites, cont.

Candidates outside of United States can now enter dates in DD/MM/YYYY & YYYY/MM/DD aligns with date conversions.

### What happens if I do nothing

- No changes and the external career site will work as it currently does.

### Additional considerations

- None

# Non-US English Locales on External Career Sites demo

## Date format previously with English (United Kingdom)

[← Back to Job Posting](#)

RP - Test Date Validation



### Application Questions

\* Indicates a required field

Select a date

MM/DD/YYYY

## Date formatted to United Kingdom meet local date preferences

W my workday    W tenent - workday

English (United Kingdom)

Settings | a

[Search for Jobs](#)

[Candidate Home](#)

\* Indicates a required field

Select a date

DD/MM/YYYY

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

# Recruiting features at-a-glance

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## New Workday Onboarding Experience

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JIRA	ONB-2046
Setup effort	Setup required
Change impact	Provides ample of lead time to start onboarding process

---

## Non-US English Locals on External

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JIRA	CXS-14473
Setup effort	Setup required
Change impact	Easily translates to locale date formatting as soon they become a pre-hire

---

# Talent Management & Performance

# Presented by



Sammy Mukherjee

CVS Consultant

# Printing Employee Reviews for Additional Personas

Workday enables UI layout print access for Guided Experience employee reviews to additional personas

## Reasons to consider this feature

- Increases access to print employee reviews and improves communication.
- With this update, the additional personas with access to an employee event in *My Tasks* can print or save the UI layout of a review when they click the **Print** icon.
- Workday continues to deliver the Workday-defined  print layout for employee reviews to users with access to the **Performance** tab on the worker profile.
- Workday generates the employee review printout PDF they click the **Print** icon or the **Create New PDF** button.

## What do I need to do

No steps need to be taken. This feature is automatically available and displays the **Print** icon  for the following personas from their My Tasks review event:

- Former managers.
- Manager for majority of event.
- Additional managers.
- Additional reviewers.

<https://doc.workday.com/release-notes/en-us/hrperf/8634747.html>

# Printing Employee Reviews for Additional Personas, cont.

Workday enables UI layout print access for Guided Experience employee reviews to additional personas

## What happens if I do nothing

- No steps need to be taken. This feature is automatically available.

## Additional considerations

If the additional personas have access to **Guided Experience** performance reviews tasks, be sure to include them in testing scenarios going forward.

<https://doc.workday.com/release-notes/en-us/hrperf/8634747.html>

# Printing Employee Reviews for Additional Personas demo

Print icon in the left panel for additional personas on employee review event.

The screenshot displays a web interface for employee reviews. On the left is a sidebar titled "Complete Self Evaluation" with a sub-section "Self Evaluation: TW:ACDFGQRSO\_PR\_Templ...". Below this is an "Actions" button and a date range "01/28/2025 - 01/28/2025". A red arrow points to a "Print" icon in the sidebar. The main content area is titled "Accomplishments - Ratings with Override" and contains a paragraph of Lorem Ipsum text. Below the text is an "Add" button. Further down is an "Employee Summary" section with fields for "Calculated Rating" (empty), "Rating" (a dropdown menu showing "select one"), "Rating Description" (empty), and "Comment" (a rich text editor with a toolbar).

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

# Printing Employee Reviews for Additional Personas demo

Workday enables UI layout print access for additional personas on employee review event

## Print options for Users accessing *Performance* tab on Worker Profile

The screenshot shows the 'Performance' tab interface. At the top, it says 'In Progress: 1 item'. Below is a table with columns: Review, Review Period Start Date, Review Period End Date, Status, Awaiting, Review PDF, View Review, and Create Review PDF. A red arrow points to the 'Create Review PDF' button in the 'Create Review PDF' column for the first row. Below the table is a 'My Reports' section with a table of reports. At the bottom, there are 'More Reports' and 'Process Monitor' buttons.

Review	Review Period Start Date	Review Period End Date	Status	Awaiting	Review PDF	View Review	Create Review PDF
TW-ACDFGQRSO_PR_Template: Dennis Tucker	01/28/2025	01/28/2025	Complete Self Evaluation for Performance Review		Tucker, Dennis TW-ACDFGQRSO_PR_Template 01_28_2025.pdf	View	Create New PDF

File Name	Type	File	Created by	Date and Time Created	
Tucker, Dennis TW-ACDFGQRSO_PR_Template 01_28_2025.pdf	Business Form (PDF)			01/28/2025 05:51 PM	Delete
Tucker, Dennis TW-ACDFGQRSO_PR_Template 01_28_2025.pdf	Business Form (PDF)			01/28/2025 05:51 PM	Delete

## Workday-defined print layout for Employee Reviews

The screenshot shows a printed report layout for an employee review. It includes a header with the employee's name, title, and organization. The main content is divided into sections: 'Overall - Prompt for Overall Rating', 'Employee Overall Evaluation', 'Accomplishments - Ratings with Override', and 'Competencies - Proficiency Scales'. Each section contains a 'Calculated Rating', 'Rating', and 'Comment' field.

**Overall - Prompt for Overall Rating**

**Employee Overall Evaluation**

Calculated Rating: 0  
Rating: 0  
Comment:

**Accomplishments - Ratings with Override**

**Section Summary**

**Employee Evaluation**

Calculated Rating: 0  
Rating: 0  
Comment:

**Competencies - Proficiency Scales**

**Building Talent**

Determines objectives and strategies, organizes work, sets priorities, determines resource requirements, coordinates with other parts of the organization to accomplish goals, monitors and evaluates the progress and outcomes of operational plans.

Weight: 0

**Employee Evaluation**

Proficiency Rating:  
Comment:

**Competitive Knowledge**

Competitive Knowledge  
Weight: 0

**Employee Evaluation**

Proficiency Rating:

# Advance Steps in the Assess Skills Business Process

Improved business process management for skill assessments.

## Reasons to consider this feature

- This enables you to keep skill assessment data and complete skill assessments even when 1 or multiple steps on the Assess Skills business process are not completed.
- Now you can advance steps of the Assess Skills business process before the steps are complete.
- You can advance steps:
  - Manually by accessing individual in-progress skill assessments.
  - Using the Mass Advance Business Process task.
  - Using the Mass Operation Management task.

## What do I need to do

- We recommend that you review your notification configurations within the business process and modify or turn off notifications when mass-advancing business process steps.

<https://doc.workday.com/release-notes/en-us/skills/8729573.html>

# Advance Steps in the Assess Skills Business Process, cont.

Improved business process management for skill assessments.

## What Do I Need to Do?

- Set up Skills Cloud.
- To initiate the **Mass Advance Business Process** task, you must be in a security group with access to the **Manual Advance** action in the **Who Can Do Actions on Entire Business Process** section of the business process security policy.

## Example

You kick off the *Assess Skills* business process for a worker. The worker is on leave and can't complete their self-assessment, so you manually advance the business process to the next step so the worker's manager can complete their assessment of the worker's skills.

<https://doc.workday.com/release-notes/en-us/skills/8729573.html>

# Flex Teams Web Services

New web services for flex teams. Setup Required

## Reasons to consider this feature

- The new web services enable you to more easily import and export flex teams data.
  - Complete Flex Team
  - Get Flex Team Endorsements
  - Put Flex Team Endorsements
- This is secured to the ***Manage: Flex Teams*** domain

## What do I need to do

1. You might need to take additional steps to enable this feature based on your organization's subscription service agreement.
2. To view your Subscription Service Agreement value.
  - 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.

Configure access to the new web services on the ***Manage: Flex Teams*** domain.

<https://doc.workday.com/release-notes/en-us/gigs/8402931.html>

# Flex Teams Web Services

New web services for flex teams. Setup Required

## What happens if I do nothing

- You can continue to complete flex teams and add flex team endorsements as you do today.

## Additional considerations

- You can't use this web service to complete advanced flex teams. Advanced flex teams automatically complete when all roles are completed.
- You can only complete flex teams that have a **status of Fully Staffed** or **In Recruiting**, with at least 1 approved member.
- If completing an advanced flex team role, then you must load separately in the EIB, as Flex Teams and Flex Team Roles leverage different reference ID's in the template.

<https://doc.workday.com/release-notes/en-us/gigs/8402931.html>

# Consolidated Interests Web Services

These web services support updating, retrieving, and importing worker career interests within the consolidated interests framework.

## Reasons to consider this feature

- Facilitates the career development journey by enabling you to import and export worker interests to update all career preferences, including:
  - Career interests and preferences.
  - Job interests.
  - Skill interests.
  - Travel and relocation preferences.

With this update, Workday delivers and makes consolidated interests web services public with Version 44.0:

- Manage Interests
- Get Interests (Talent Public)

## What do I need to do

- Review Security Considerations
  - Configure security to create and launch EIBs.
  - Review manage interest web service template
- Only Skill Cloud skills and maintained skills can be uploaded as skill interests. Crowdsourced skills are not supported by the Manage Interests Web Service.

<https://doc.workday.com/release-notes/en-us/taladv/8324344.html>

# Consolidated Interests Web Services

These web services support updating, retrieving, and importing worker career interests within the consolidated interests framework.

## What happens if I do nothing

- Users can upload unconsolidated interests as they do today. Unconsolidated interests don't include skill interests or location values for short and long term relocation preferences.

## Additional considerations

- Any information that you submit with this EIB replaces and overwrites the information currently in Workday. It does not append the new information loaded against the worker's profile.
- Running the inbound EIB will overwrite all fields in the worker's Career Interests data.
- If customers already leverage Manage Interest prior to running the EIB inbound for *Manage Interests*, you must complete these steps in this order:
  - Extract all interests via the Get Interests web service.
  - Add in any adjustments to the interests data with all of the workers' Career Interest data.
  - Save the EIB.
  - Test all inbound EIB runs in a testing environment first (i.e. Sandbox, IMPL or Sandbox Preview) prior to running the EIB in a customer PROD environment.
  - Validate the EIB prior to loading the inbound EIB Manage Interests data.

<https://doc.workday.com/release-notes/en-us/taladv/8324344.html>

# Talent Management features at-a-glance

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## Printing Employee Reviews for Additional Personas

JIRA	HRPERF-31377, HRPERF-32981
Setup effort	Automatically available
Change impact	With this update, the additional personas with access to an employee event in My Tasks can print or save the UI layout of a review when they click the <b>Print</b> icon

---

## Advance Steps in the Assess Skills Business Process

JIRA	SKILLS-4967
Setup effort	Automatically available
Change impact	This enables you to keep skill assessment data and complete skill assessments even when one or multiple steps on the Assess Skills business process are not completed

---

# Talent Management features at-a-glance

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## Flex Teams Web Services

JIRA GIGS-5800

Setup effort Setup required

Change impact The new web services enable you to more easily import and export flex teams data

---

## Consolidated Interests Web Services

JIRA TALADV-15942

Setup effort Setup Required

Change impact These web services support updating, retrieving, and importing worker career interests within the consolidated interests framework

# Next steps



**Reminder:** This content along with the Q&A will be made available to you after the webinar



**Reminder:** We value your feedback; please complete the post-webinar survey

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



**Managing the release**



**Building or updating your strategic roadmap**



**User adoption and change management**

# Thank you

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