Impact analysis manual

Workday 2025R1

As of January 31, 2025

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Workday’s safe harbor

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

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Select the guide that's right for you

You are here

Automatically available features manual	Top features manual	Impact analysis manual
• Comprehensive list of the automatically available features included in the release • Also includes retired functionality • **Helps you determine where to focus testing efforts during the release preview window**	• Overview of specific features our experts have identified as most impactful to you, • Includes automatically available and setup required • **Helps you update your roadmap and plan efforts beyond the release window**	• Deeper dive into how the features may impact you by providing before and after details and estimated level of effort • Includes the Workday "Coming Soon" features • **Helps you understand which features for which you may need to prepare**

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Release preparation tips

Quick reference for steps to take during the release preparation window

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

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

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

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

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

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Additional release support services

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

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

Contact your Service Delivery Lead (EM, SDM, PA) for more details on each package.

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Absence

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Absence Report Fields for Leave and Time Off

What's changing

Workday continue to improve how you configure leave and time off absences.

Additional Considerations

Workday delivers these new report fields on the Leave Request Event business object that you can use in custom reports and condition rules:

- Days Between Leave Start Date and Today
- Total Units Requested for Current Leave Including All Leave Types and Time Offs Associated with the Current Leave Type

The new report fields are secured to these domains:

- Self-Service: Leave of Absence
- Worker Data Leave of Absence

What do I need to do

N/A

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/abs/8758676.html

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Absence Report Fields for Leave and Time Off, cont.

Additional Considerations

Workday also deliver new Constant Value Calculations that you can use to configure time off plans, accruals, and time offs:

- 999
- 10000
- 224

The new calculations are Workday Owned.

https://doc.workday.com/release-notes/en-us/abs/8758676.html

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Automatically available

Absence Report Fields for Leave and Time Off

Impact analysis

Before the release	After the release
Mentioned report fields do not exist.	New report fields which can be found in the Leave Request Event business object: • Days Between Leave Start Date and Today • Total Units Requested for Current Leave Including All Leave Types and Time Offs Associated with the Current Leave Type • 9999 • 10000 • 224

Impact description
The new report fields and calculations help increase the accuracy of time off and leave data.

https://doc.workday.com/release-notes/en-us/abs/8758676.html

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Automatically available

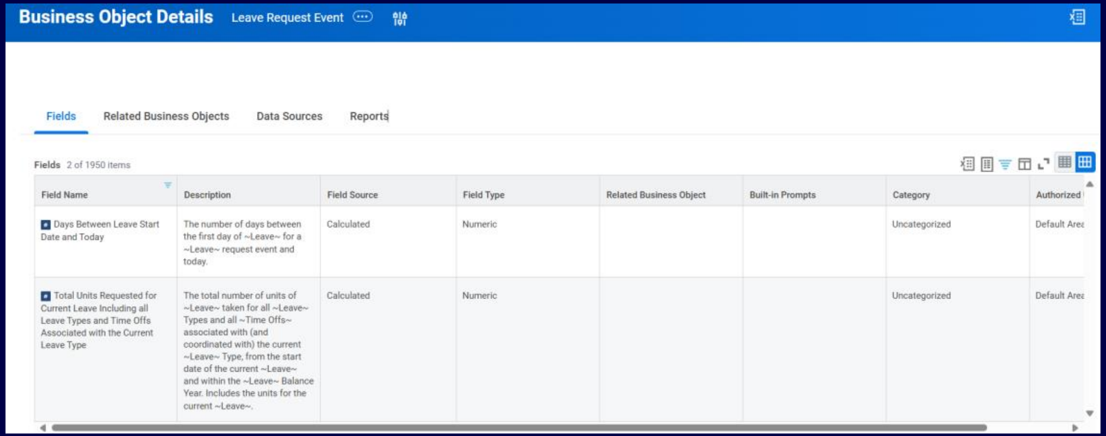
Absence Report Fields for Leave and Time Off

Impact analysis

Before the release

N/A

After the release



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Accrual Expiration Override Web Services

What's changing

Workday delivers two new transactional web services to the Accrual Expiration feature.

Additional Considerations

Workday deliver the following web services to the Worker Data: Time Off (Adjustments and Overrides) domain:

- Get Accrual Expiration Override
- Put Accrual Expiration Override

What do I need to do

Configure access to the new web services on the **Worker Data: Time Off (Adjustments and Override)** domain.

What happens if I do nothing

Continue overriding Accrual Expiration using the **Maintain Accrual Expiration Overrides** task

https://doc.workday.com/release-notes/en-us/abs/8352042.html

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Automatically available

Accrual Expiration Override Web Services

Impact analysis

Before the release	After the release
Manually overriding Accrual Expiration using the **Maintain Accrual Expiration Overrides** task	Use the web service to do the accrual expiration.

Impact description
This feature enables you to get or put accrual expiration overrides using these web services.

https://doc.workday.com/release-notes/en-us/abs/8758676.html

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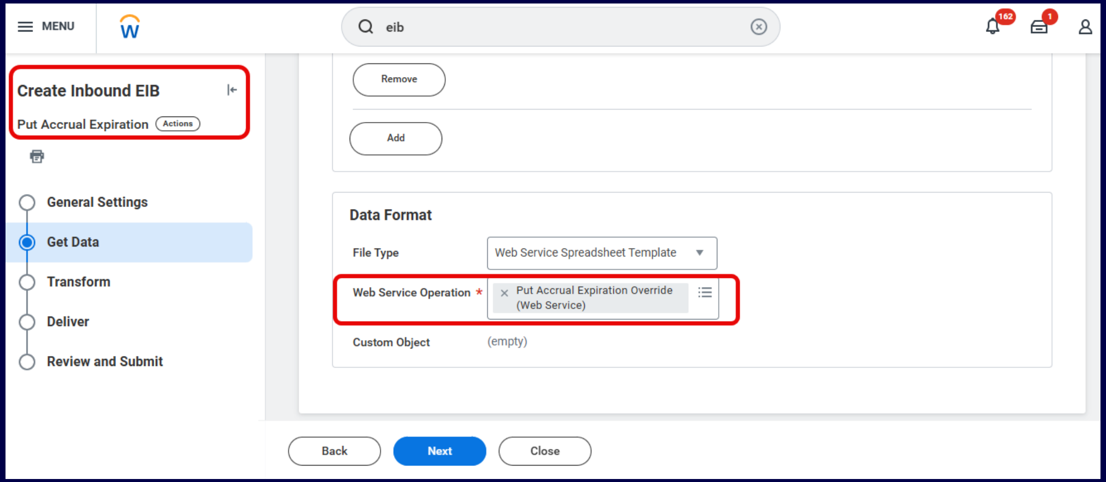
Accrual Expiration Override Web Services

Impact analysis

Before the release

N/A

After the release



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Time Off Web Services for U. S. Federal Personnel Action Requests

What's changing

Workday delivers enhancements to the Personnel Action Requests (PAR) feature to improve efficiency and flexibility in managing PAR requests.

Additional Considerations

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

- Enter Time Off
- Import Time Off Request Event Batch

When you use the Import Time Off Request Event Batch web service, enter or select **Y** in the **Auto Complete** field to ensure that PAR entries process automatically. If you don't enter or select **Y** in this field, you must manually process the PAR entries.

What do I need to do

This feature is specific to Federal US Customers. Update to the latest version as required.

What happens if I do nothing

This feature is specific to Federal US customers only. If you do not update to the latest version, the Personnel Action Request (PAR) web service will not be available.

https://doc.workday.com/release-notes/en-us/abs/8763338.html

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Time Off Web Services for U. S. Federal Personnel Action Requests

Impact analysis

Before the release	After the release
Personnel Action Request (PAR) business process cannot be added as a subprocess of the web services: • Enter Time Off • Import Time Off Request Event Batch	Personnel Action Request (PAR) is now available to be enabled as a subprocess of these web services.

Impact description
With this release, Workday delivers enhancements to the Personnel Action Requests (PAR) feature to improve efficiency and flexibility in managing PAR requests.

https://doc.workday.com/release-notes/en-us/abs/8763338.html

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Setup required

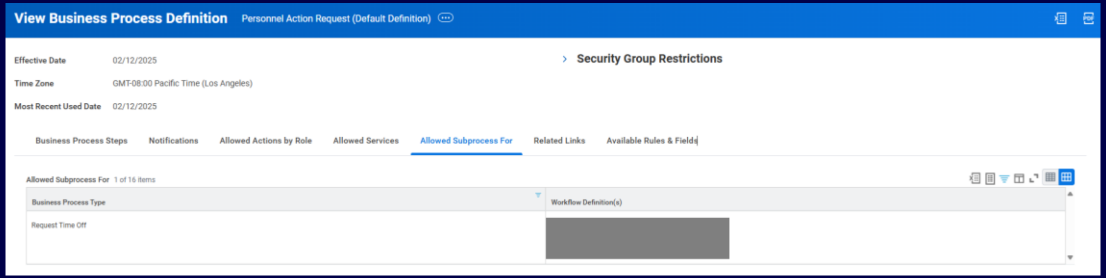
Time Off Web Services for U. S. Federal Personnel Action Requests

Impact analysis

Before the release

N/A

After the release



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Change Job Impacts on Time Off

What's changing

Workday enables you to configure Workday to automatically remove approved time off entries in response to change job events when workers are no longer eligible for the time off or the entries are no longer valid working days for the workers.

Additional Considerations

- Workday delivers a new Remove invalid Time Off Entries After Job Change service step that you can add to the Change Job business process after the Completion step.

What do I need to do

Edit the Change Job business process and add the Remove Invalid Time Off Entries After Job Change service step after the Completion step.

After the Remove Invalid Time Off Entries After Job Change service step completes, the service step won't reflect any corrections or rescinds of the Change Job event because Workday doesn't support Correct or Rescind actions on time off business processes. Workday recommends that you include the Remove invalid Time Off Entries After Job Change service step later in your Change Job business process definition to reduce the likelihood of it completing prior to any Change Job corrections or rescinds.

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

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Change Job Impacts on Time Off, cont.

Additional Considerations

- Also delivers a new Initiating Business Process of Remove Invalid Time Off Entries Service report field on the Time Off Event business object (secured to the Public Reporting Items domain) that you can use in condition rules and custom reports to identify the business process type that initiated the time off correction event as part of the Remove Invalid Time Of Entries service step.

What do I need to do

After you add the service step for the first time, Workday displays a warning message. Access the Evaluate and Process Events Impacting Absence task to run a background job immediately that initiates evaluation and correction of ineligible future time off entries and accrual adjustments. From this point onwards, Workday initiates the background job automatically every 15 minutes.

Note: If Workday doesn't display a warning message on the business process definition after you add the step for the first time, the background job is already running and you don't need to access the task to run the job.

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

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Change Job Impacts on Time Off, cont.

What happens if I do nothing

If you don’t take action, invalid time off entries due to changes in working days or eligibility can remain on workers’ absence calendars. This results in invalid data, which can negatively impact reporting, balance calculation, integrations, and payroll processing. Absence administrators, HR Partners, or HR Specialists need to manually navigate to workers’ calendars and remove these entries.

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

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Setup required

Change Job Impacts on Time Off

Impact analysis

Before the release	After the release
Invalid time off entries after job change had to be manually corrected or rescinded.	Workday enables you to automatically remove approved time off entries in response to change job events when workers are no longer eligible for the time off or the entries are no longer valid working days for the workers.

Impact description
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.

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

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Setup required

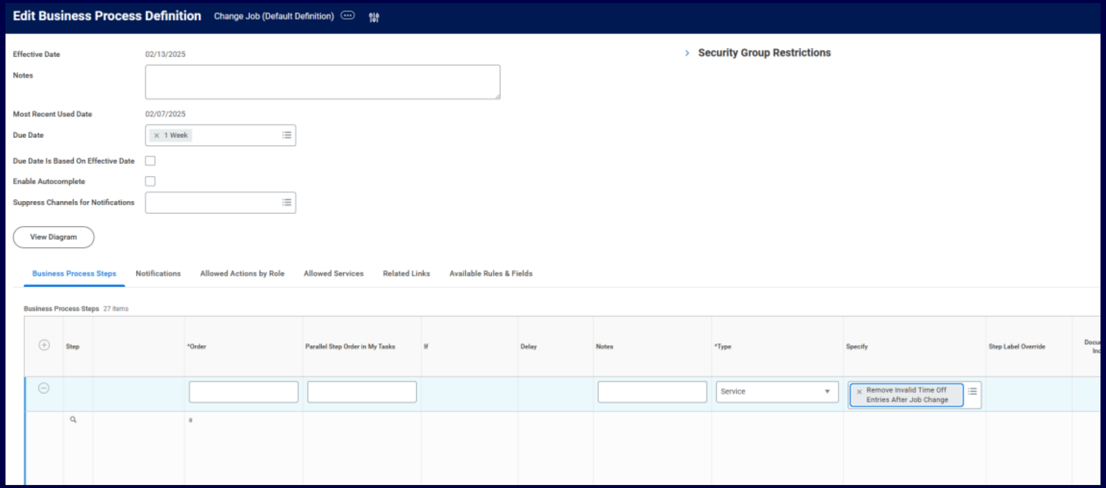
Change Job Impacts on Time Off

Impact analysis

Before the release

N/A

After the release



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Assign Work Schedule Impacts on Time Off

What's changing

Workday enables you to configure Workday to automatically remove approved time off entries in response to assign work schedule events when workers are no longer eligible for the time off or the entries are no longer valid working days for the workers.

Additional Considerations

- Workday delivers a new Remove Invalid Time Off Entries After Work Schedule Assignment service step that you can add to the Assign Work Schedule business process after the Completion step.

What do I need to do

Edit the Assign Work Schedule business process and add the Remove Invalid Time Off Entries After Work Schedule Assignment service step after the Completion step.

What happens if I do nothing

If you don't take action, invalid time off entries due to changes in working days or eligibility can remain on workers' absence calendars. This results in invalid data, which can negatively impact reporting, balance calculation, integrations, and payroll processing.

https://doc.workday.com/release-notes/en-us/abs/7036386.html

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Assign Work Schedule Impacts on Time Off, cont.

Additional Considerations

- Workday also delivers a new Initiating Business Process of Remove Invalid Time Off Entries Service report field on the Time Off Event business object (secured to the Public Reporting Items domain) that you can use in condition rules and custom reports to identify the business process type that initiated the time off correction event as part of the Remove Invalid Time Of Entries service step.

https://doc.workday.com/release-notes/en-us/abs/7036386.html

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Setup required

Assign Work Schedule Impacts on Time Off

Impact analysis

Before the release	After the release
Absence administrators, HR Partners, or HR Specialists need to manually navigate to workers’ calendars and remove these entries..	Eliminating workarounds to identify ineligible time off entries or time off entries on invalid dates.

Impact description
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.

https://doc.workday.com/release-notes/en-us/abs/8758676.html

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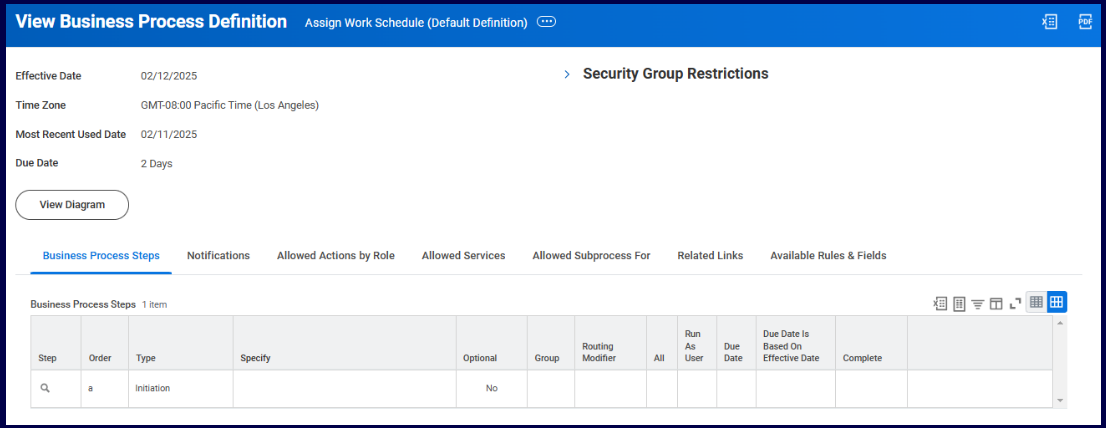
Setup required

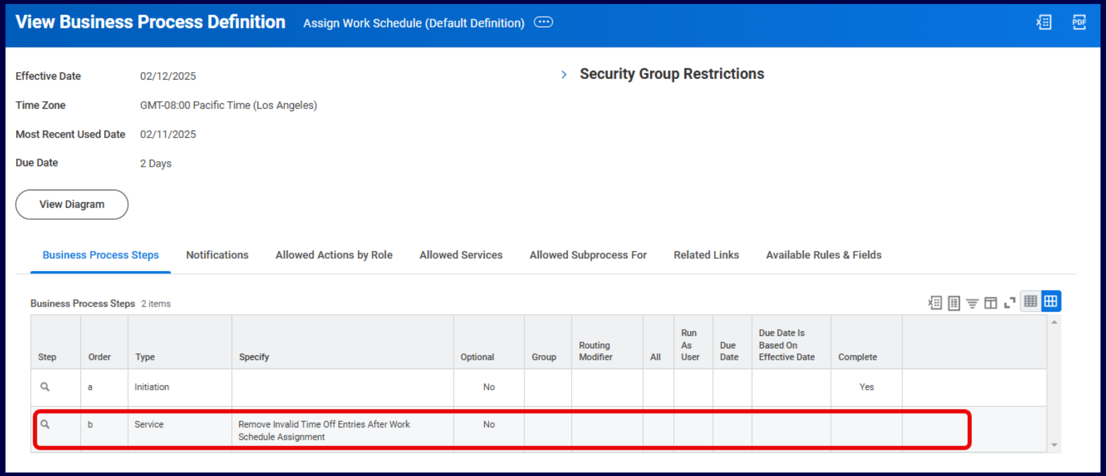
Assign Work Schedule Impacts on Time Off

Impact analysis

Before the release



After the release



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Start and End Times on Absence Tables

What's changing

Workday enables you to configure the ability for workers to enter start and end times on time off requests against absence tables when they enter time off using these tasks and reports:

- Enter Time by Week
- Enter Time for Worker (High-Volume Time Entry)
- Enter Time (Micro-Edit)
- Request Absence

Additional Considerations

Workday now adds these new check boxes on the Details tab of the Create Absence Table and Edit Absence Table tasks:

- Display Start and End Time
- Start and End Time Required

What do I need to do

Configure the new Absence Calendar Experience. Workday doesn't enable you to enter start and end times against absence table requests on the legacy absence and time off calendars. Access either of these tasks to configure start and end times:

- Create Absence Table
- Edit Absence Table

What happens if I do nothing

Workers won't be able to enter start and end times when they request time off against an absence table and you won't be able to track the exact times that workers plan to be away from work.

https://doc.workday.com/release-notes/en-us/abs/8351732.html

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Start and End Times on Absence Tables, cont.

Additional Considerations

You can select these check boxes when the Entry Option is Enter through Time Off Only to determine whether workers can enter start and end times.

Also add a new Calculate Quantity Based on Start and End Time check box that you can select for any entry option when all tier plans are hour-based.

Workday also delivers updates to these Absence Management web services to support start and end times on absence tables:

Enter Time Off

Import Time Off Request Event Batch

https://doc.workday.com/release-notes/en-us/abs/8351732.html

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Setup required

Start and End Times on Absence Tables

Impact analysis

Before the release	After the release
Workers won’t be able to enter start and end times when they request time off against an absence table and you won’t be able to track the exact times that workers plan to be away from work.	Enables you to track the exact times that workers plan to be away from work

Impact description
This feature enables you to track the exact times that workers plan to be away from work to provide a more seamless integration with Workday Scheduling, the Absence third-party calendar integration, and other planning applications. The Scheduling Optimization Engine can use this data to generate schedules that take into account worker availability.

https://doc.workday.com/release-notes/en-us/abs/8758676.html

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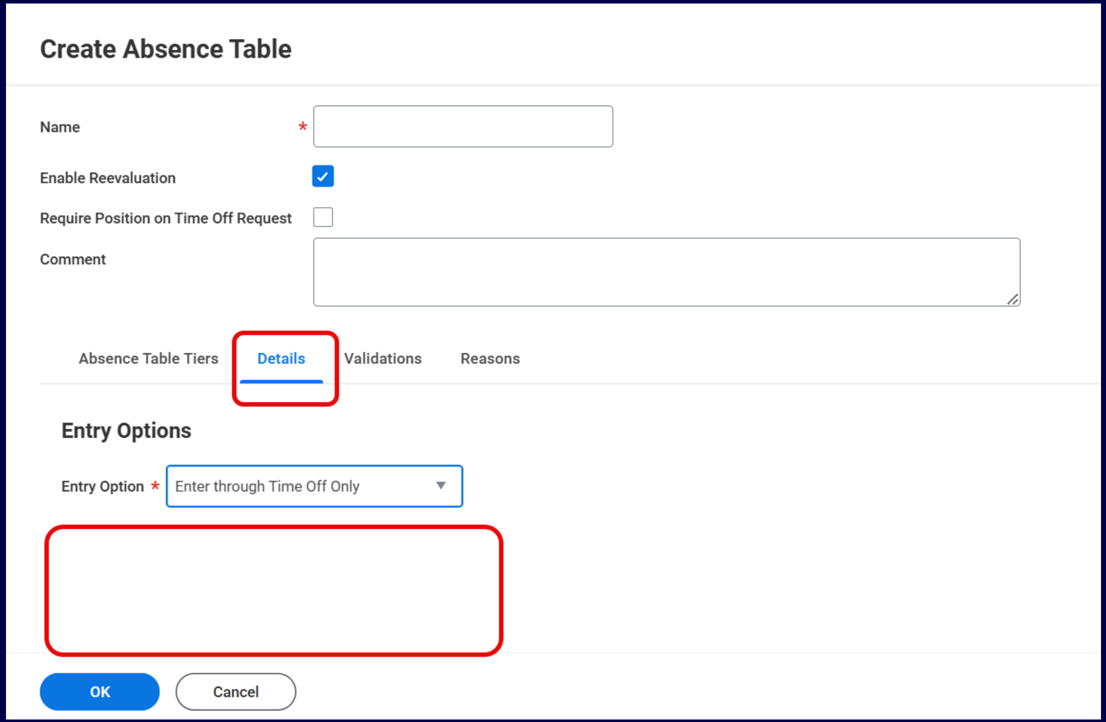
Setup required

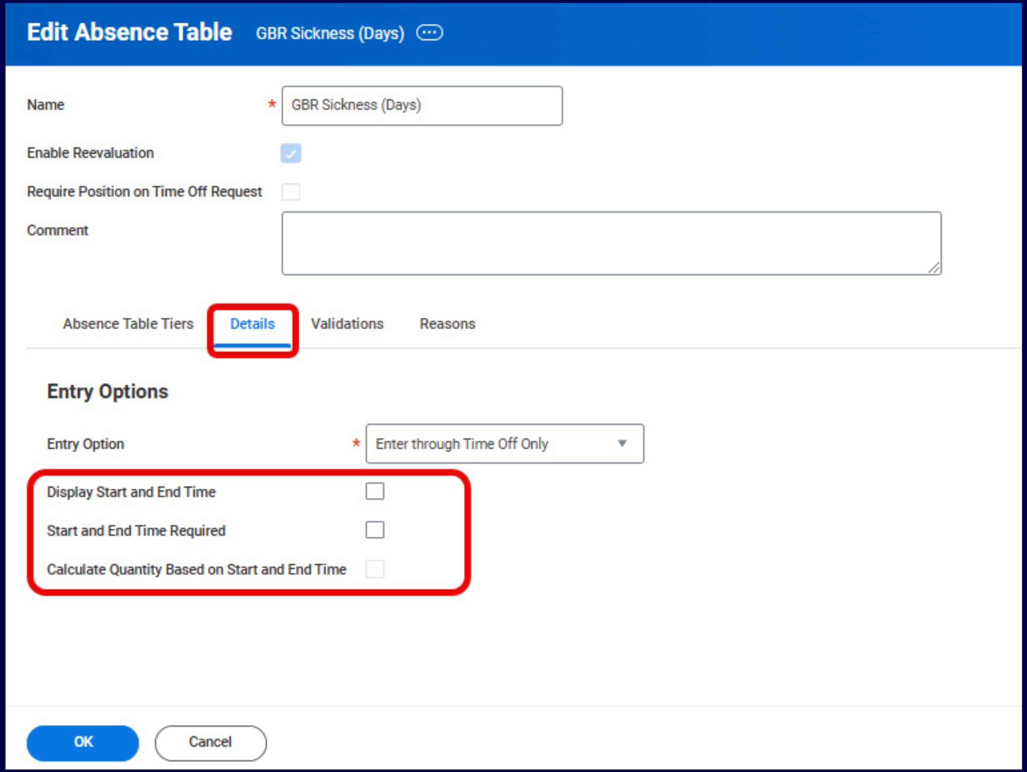
Start and End Times on Absence Tables

Impact analysis

Before the release



After the release



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Accounting Center

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Support for Multiple Transaction Currencies in Accounting Center

What's changing

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

Additional considerations

- Workday now removes a validation that prevents you from processing transactions with more than a single transaction currency.
- Workday now displays this error: Transaction debits must equal transaction credits only when there is a single transaction currency.

What do I need to do

- To ensure total ledger debits equal credits, you should provide ledger amounts for your transactions if total transaction debits don't equal credits in a common currency.
- To ensure you can generate a balanced journal entry in alternate ledger currency, you should verify total transaction debits equal credits if alternate ledger currency is enabled for the company that you are generating accounting.

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

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Support for Multiple Transaction Currencies in Accounting Center, cont.

Additional considerations

- Workday now applies rounding adjustments on valid multicurrency transactions in these scenarios: Transaction amount total debits equals total credits for all journal lines with the same transaction currency or transaction currency group.
- Ledger amount has not been overridden for any journal line within the transaction currency group.

What happens if I do nothing

Your transaction processing will continue as usual.

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

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Support for Multiple Transaction Currencies in Accounting Center

Impact analysis

Before the release	After the release
Workday had a validation that prevented you from processing transactions with more than one transaction currency.	Workday now removes a validation that prevents you from processing transactions with more than a single transaction currency.

Impact description
Support for Multiple Transaction Currencies in Accounting Center Workday now applies rounding adjustments on valid multicurrency transactions

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

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Automatically available

Accounting Source Analytics Data Source Security Configuration

What's changing

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

Additional considerations

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

What do I need to do

N/A

What happens if I do nothing

N/A

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

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Accounting Source Analytics Data Source Security Configuration, cont.

Additional considerations

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

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

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Automatically available

Accounting Source Analytics Data Source Security Configuration

Impact analysis

Before the release	After the release
Prior to the release, you had to run the Edit Data Source Security task individually for each table and dataset.	You no longer have to access and run the Edit Data Source Security task for each table and dataset individually. You can now use a single task to change the reporting permissions for each table and dataset in an accounting source. Workday now delivers a new Edit Accounting Source Prism Data Source Security task that enables you to configure domains and securing entities for all reportable tables and datasets for an accounting source.

Impact description
Workday now enables you to make bulk updates to the Prism Data Source security configuration for all reportable tables and datasets for an accounting source.

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

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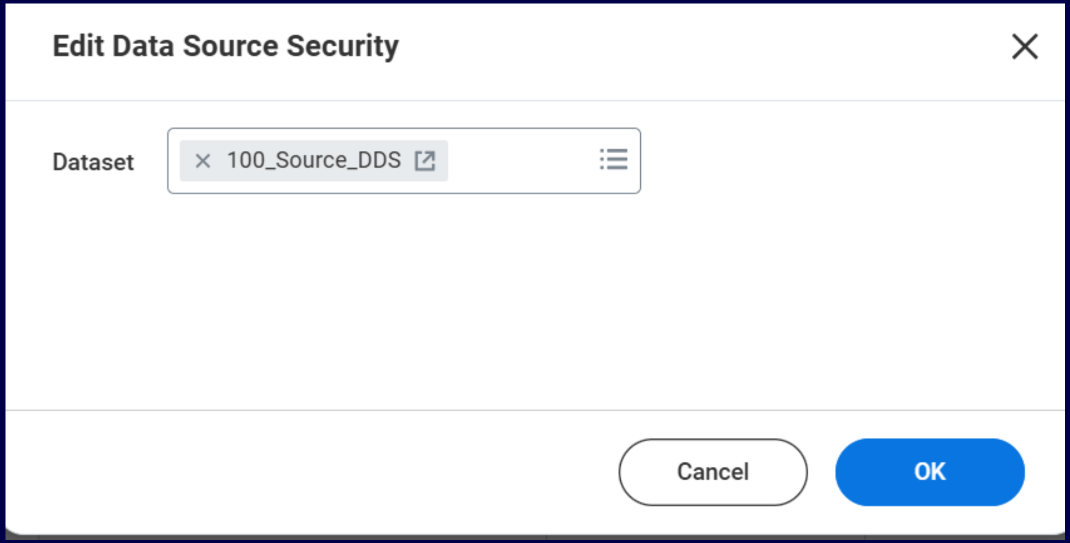
Automatically available

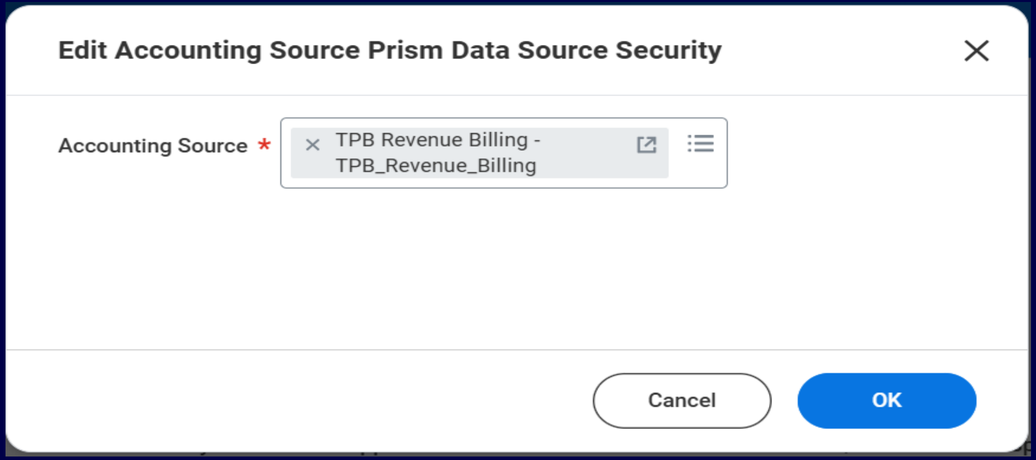
Accounting Source Analytics Data Source Security Configuration

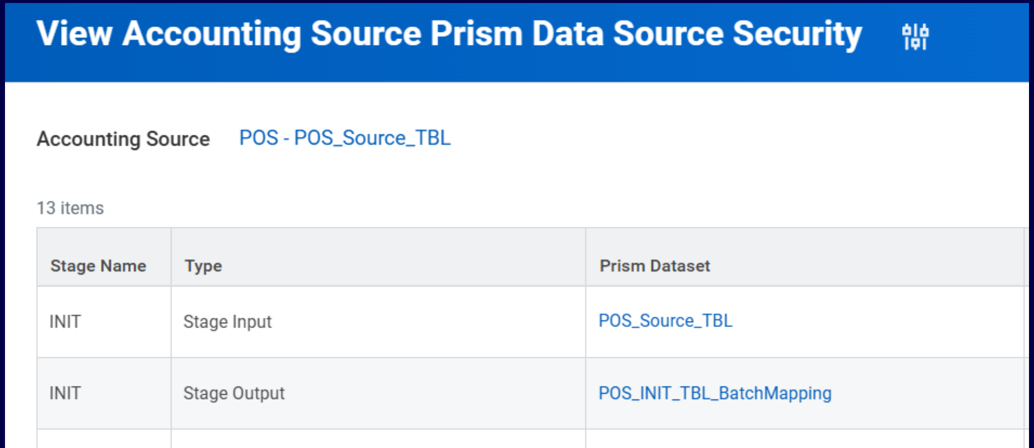
Impact analysis

Before the release



After the release





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Access to Prism Data in Accounting Center

What's changing

- With Workday 2025 R1, workday is modifying how you access Prism data in Accounting Center for processing batches and resolving errors. You only need access to the respective Accounting Center security domain for the task without also needing access to the Prism Data Sources of the Accounting Source tables and datasets.
- Also, when you create an accounting source, workday will no longer automatically populate these Accounting Center security domains on the Prism Data Sources:
  Process: Accounting Center
    - Set Up: Accounting Center - Maintain
- Additionally, Workday now automatically populates the Prism: Default to Dataset Access domain on the Prism Data Sources.
- Prism Data Source security access is still required for reporting purposes.

What do I need to do

N/A

Additional considerations

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

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

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Access to Prism Data in Accounting Center

Impact analysis

Before the release	After the release
Earlier you needed access to the Prism Data Sources & Security Domains.	You only need access to the respective Accounting Center security domain for the task without also needing access to the Prism Data Sources of the Accounting Source tables and datasets. Additionally, Workday now automatically populates the Prism: Default to Dataset Access domain on the Prism Data Sources.

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

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

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setup required

Accounting Center Detailed Journal EIB and Attachments Functionality

What's changing

- Workday now enables you to add additional attributes in columns instead of rows on the Accounting Center Detailed Journal EIB.
- Workday also enables you to control access when users delete attachments on Accounting Center Detailed Journals.
- You can ensure access to only the task for adding an attachment without letting users change or delete an attachment. Workday now secures the tasks for adding and changing or deleting attachments to separate subdomains instead of securing both tasks to a single domain. "

What do I need to do

Update to v44.0 or greater of the Import Accounting Center Detailed Journal web service to use the new template.

Enable the security policy for the new Process: Accounting Center Detailed Journals - Add Attachment domain to control access to the new task.

What happens if I do nothing

The previous version of the Import Accounting Center Detailed Journal web service includes the old template.

The only domain visible in Workday will be the existing Process: Accounting Center Detailed Journals - Add/Change Attachment domain that secures access to the task for adding or changing attachments.

https://doc.workday.com/release-notes/en-us/finac/8378968.html

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Accounting Center Detailed Journal EIB and Attachments Functionality, cont.

Additional considerations

Workday delivers a new Accounting Center Detailed Journal EIB template, enabling you to configure each additional attribute in 2 columns, one for the name and another column for the value. These columns automatically display on the template so they don't need to be added manually to the template. Workday dynamically determines the additional attribute field type based on the attribute name and validates the value when loading the EIB.

You can now configure a maximum of 50 additional attributes for each journal line and 1 million total additional tributes each time you load data via EIB. You can add a maximum of 50,000 journal lines each time you load data via EIB.

https://doc.workday.com/release-notes/en-us/finac/8378968.html

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setup required

Accounting Center Detailed Journal EIB and Attachments Functionality

Impact analysis

Before the release	After the release
Earlier workday did not have a Web Service for Bank Routing Rules.	Workday delivers a new **Accounting Center Detailed Journal EIB** template, enabling you to configure each additional attribute in 2 columns, one for the name and another column for the value. These columns automatically display on the template so they don't need to be added manually to the template.

Impact description
You can now use publicly-available web services to maintain bank routing rules, saving you time and effort when adding or updating bank accounts used for settling payments.

https://doc.workday.com/release-notes/en-us/finac/8378968.html

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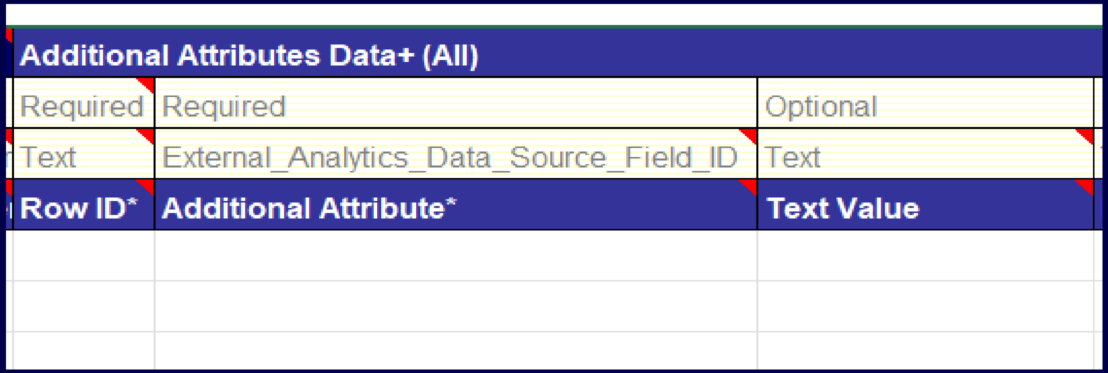
setup required

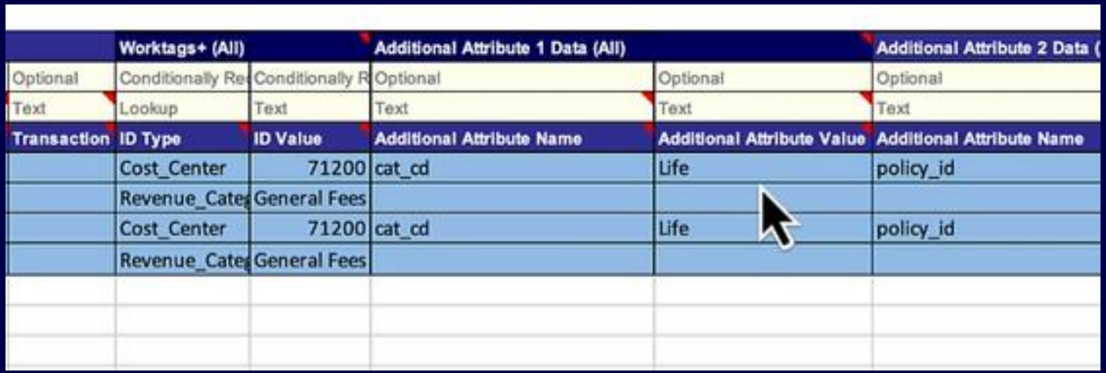
Accounting Center Detailed Journal EIB and Attachments Functionality

Impact analysis

Before the release



After the release



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Analytic Dimensions in Accounting Center

What's changing

You can now use Analytic Dimensions to enhance your reporting on Accounting Center data using a Prism data source.

What do I need to do

Create analytic dimensions in Workday and add an Instance Mapping Stage in a Prism dataset to create the desired analytic dimension business object in your Prism reporting table. Ensure the table is enabled for analysis. Modify your report configurations to leverage the analytic dimension business object, where you can now filter, prompt, and group by these instance values.

What happens if I do nothing

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

Additional considerations

- By utilizing the new Instance Mapping Stage in Prism to convert a Text field to an analytic dimension Instance field, you will have the ability to group, filter, and prompt on these fields when reporting on a Prism data source using Workday reporting tools.
- You can add Analytic Dimensions to your Accounting Center data in the enrichment stage of an Accounting Source and leverage them as additional attributes on your Detailed Journal Lines, or introduce Analytic Dimensions in the Prism pipeline after Accounting Center processing is complete. "

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

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Analytic Dimensions in Accounting Center

Impact analysis

Before the release	After the release
Earlier you were not able to use analytical dimensions to enhance your reporting on accounting center data.	You can now use Analytic Dimensions to enhance your reporting on Accounting Center data using a Prism data source. You can add Analytic Dimensions to your Accounting Center data in the enrichment stage of an Accounting Source and leverage them as additional attributes on your Detailed Journal Lines, or introduce Analytic Dimensions in the Prism pipeline after Accounting Center processing is complete.

Impact description
By storing external dimension data in Prism as an Instance field instead of a Text field, you can take advantage of more functionality in Workday's reporting tools, such as grouping, filtering, and prompting.

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

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Setup required

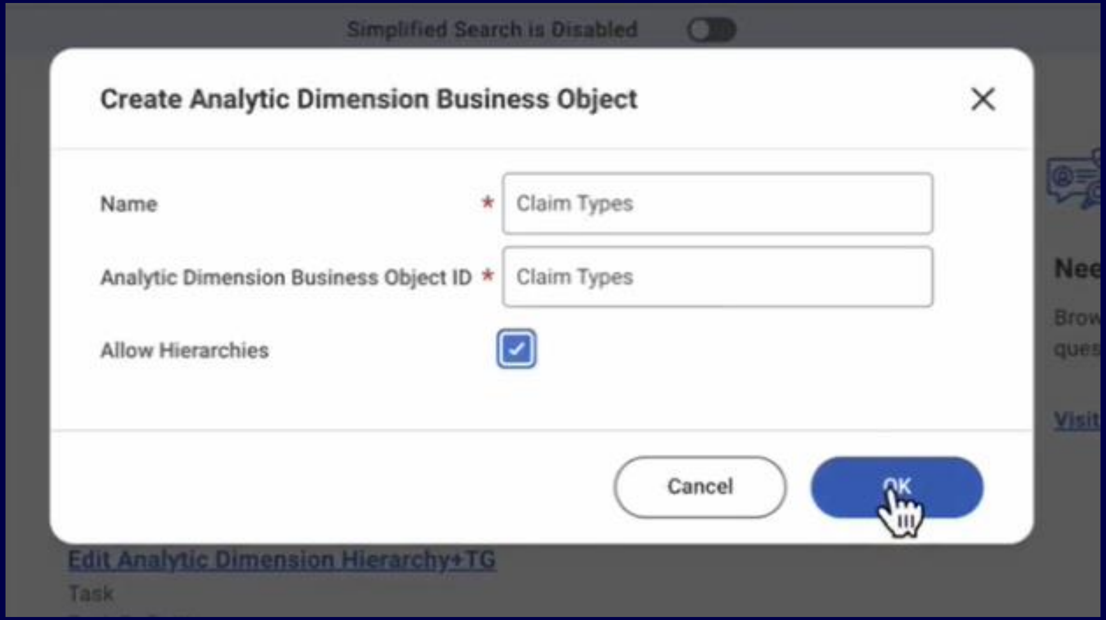
Analytic Dimensions in Accounting Center

Impact analysis

Before the release

- Workday did not have the set of task for Creating analytic dimensions to use them for enrichment of dataset.

After the release



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Support for Interworktag Affiliate Values in Accounting Center

What's changing

Workday now enables you to process transactions with interworktag affiliate values when you balance a journal by the required balancing worktag in Accounting Center. Note: You can apply interworktag affiliate values after you enable primary worktag balancing in your tenant.

What do I need to do

N/A

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/finac/8509879.html

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Support for Interworktag Affiliate Values in Accounting Center, cont.

Additional Considerations

Workday delivers a new Interworktag Affiliate prompt on the Journal Line Rules tab on the Edit Accounting Source Configuration task. Workday now includes Interworktag Affiliate in the summarization process.
Workday adds an Interworktag Affiliate column on the View Error Details page and on the Create Accounting Center Detailed Journal task.
Workday delivers a new Interworktag Affiliate report field on the Accounting Center Detailed Journal Line business object (secured to the Public Reporting Items domain) that you can use in a step condition on the Accounting Center Detailed Journal Approval Event business process definition.
Workday adds the new field on these web services:

- Get Accounting Source Snapshots
- Put Accounting Source Snapshot

https://doc.workday.com/release-notes/en-us/finac/8509879.html

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Setup required

Support for Interworktag Affiliate Values in Accounting Center

Impact analysis

Before the release	After the release
Workday did not allow you to define interworktag affiliate values for use on Accounting Center detailed and summary journal lines	Workday delivers a new Interworktag Affiliate prompt on the Journal Line Rules tab on the Edit Accounting Source Configuration task. Workday now include Interworktag Affiliate in the summarization process. Workday adds an Interworktag Affiliate column on the View Error Details page and on the Create Accounting Center Detailed Journal task.

Impact description
This enables you to define interworktag affiliate values for use on Accounting Center detailed and summary journal lines. You can also create financial reports by applying interworktag eliminations for journal lines from Accounting Center.

https://doc.workday.com/release-notes/en-us/finac/8509879.html

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Adaptive Planning

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Financial Planning Configuration Manager Accounts and Categories Flexibility

What's changing

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

What do I need to do

N/A

Additional considerations

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

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

What happens if I do nothing

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

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

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Financial Planning Configuration Manager Accounts and Categories Flexibility

Impact analysis

Before the release	After the release
Account Attributes and selection of top-level hierarchy for Revenue and Spend Category were not available	Workday now allows to select top-level hierarchies for both Revenue and Spend Category if you included them in your account concatenation. When you access an existing financial planning configuration, you can add top level hierarchy selections.

Impact description
This provides a better user experience and improves efficiency by allowing greater flexibility in the financial planning configuration manager, saving you time and effort.

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

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Automatically Available

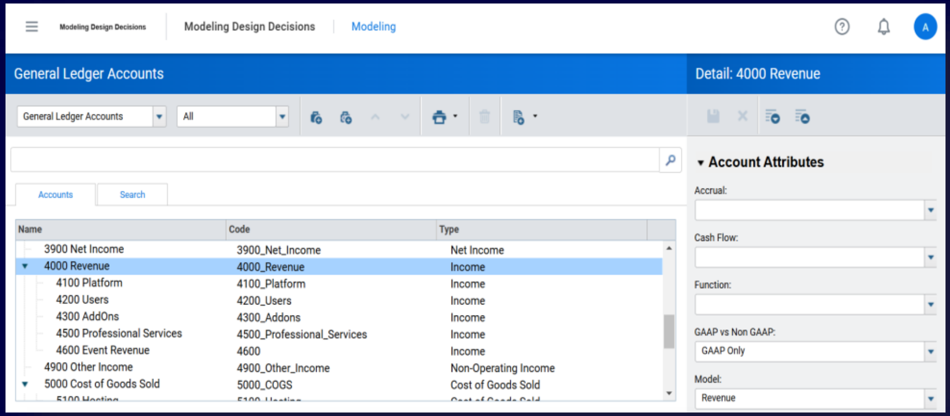
Financial Planning Configuration Manager Accounts and Categories Flexibility

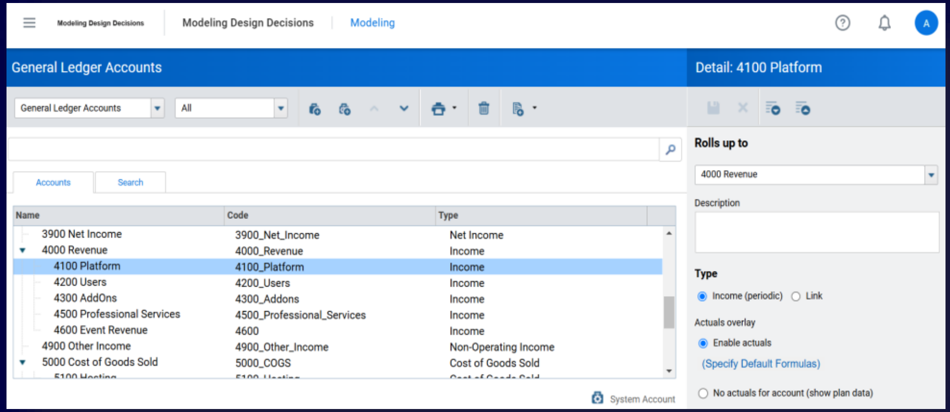
Impact analysis

Before the release

N/A

After the release





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Version-Specific Overrides for Linked Accounts

What's Changing

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

Additional Considerations

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

- Override links for specific version: Workday enables you to select this check box to display the override fields for the account.

What do I need to do

To enable the feature for a linked account:

- Go to Modeling
- Click: Custom Account
- General ledger
- Edit a cube sheet and click Cube Accounts from the Sheet Summary page

What happens If I do nothing

The options remain available to use when you need it.

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

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Version-Specific Overrides for Linked Accounts, cont.

Additional Considerations

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

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

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

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

- In sheets

What do I need to do

- Select the linked account from the account list
- Click the check box for Override links for specific version
- Complete the other fields that display.
- Save
- Load or enter data

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

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Version-Specific Overrides for Linked Accounts, cont.

Additional Considerations

- With manual imports.

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

- Loaders in Design Integrations for only general ledger and custom accounts.
- Custom Report Values and export Data APIs.

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

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

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

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Bottom-Up Workforce Planning: Organizational View

What's changing

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

Additional considerations

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

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

What do I need to do

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

What happens if I do nothing

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

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

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Bottom-Up Workforce Planning: Organizational View, cont.

Additional Considerations

- In the organization hierarchy view, you can also create and edit positions.
- Workday adds the new switch in the upper-right corner of your page when you view headcount or headcount forecast plans using these My Tasks items:
- Headcount Planning Event
- Headcount Planning Participant Detail Event

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

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Introducing Shared Scenarios

What's changing

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

Additional considerations

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

What do I need to do

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

What happens if I do nothing

Users with the Manage Scenarios permission can start sharing scenarios.

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

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

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Snowflake support for Cloud Data Connect and Design Integrations

What's changing

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

What do I need to do

N/A

Additional considerations

Snowflake displays as an option when you navigate to:

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

What happens If I do nothing

N/A

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

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Workday Adaptive Planning Data Agent Upgrade

What's changing

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

Additional considerations

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

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

What do I need to do

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

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

What happens if I do nothing

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

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

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

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Adaptive Planning Notifications

What's changing

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

Additional considerations

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

What do I need to do

N/A

What happens If I do nothing

N/A

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

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Perspective Folders in Dashboards

What's changing

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

What do I need to do

N/A

Additional considerations

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

What happens If I do nothing

N/A

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

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LightGBM Algorithm Supports Lever Sheets for Predictive Forecaster

What's changing

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

Additional considerations

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

What do I need to do

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

1. From the main menu, select Modeling.
2. Select Predictive Forecaster.
3. Hover over the forecasts in the list to access the More Actions menu.

What happens If I do nothing

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

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

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LightGBM Algorithm Supports Lever Sheets for Predictive Forecaster, cont.

What do I need to do

4. Click the 3 dots that display and select Edit.
5. In the Algorithm section, use the Lever Sheet prompt to add lever sheets to the forecast.
6. Select Run or Save to run it later.

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

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Chart Improvements in Dashboards

What's Changing

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

What do I need to do

N/A

Additional Considerations

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

- Show Time Period: Workday enables you to show or hide the time period on a chart.

What happens If I do nothing

N/A

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

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Chart Improvements in Dashboards, cont.

Additional Considerations

- Position: Workday enables you to position the time period next to the chart name or under the chart name.

When you hover over a chart, the following icons now display above the chart:

- Reset to Default
- Select Time Period
- Expand
- Chart options

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

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

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

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Chart Improvements in Dashboards

Impact analysis

Before the release	After the release
N/A	N/A

Impact description
The chart improvements make it easier to focus on the data and find all available chart actions.

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

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Bottom-Up Workforce Planning: Hierarchical Routing

What's Changing

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

Additional Considerations

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

- Configure Headcount Plan

What do I need to do

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

- Participate: Headcount Planning domain in the Adaptive Planning for the Workforce functional area.

What happens If I do nothing

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

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

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Bottom-Up Workforce Planning: Hierarchical Routing, cont.

Additional Considerations

- Create Headcount Forecast

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

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

When a planner submits on their My Tasks item, workday now sends a My Tasks item to the next supervisory organization owner above this planner who has access to the headcount or headcount forecast plan. Workday now restrict superior plan participants from submitting before all subordinate plan participants submit.

What do I need to do

Gives view and modify access on headcount and headcount forecast plans to the plan participant security groups.

- (Optional) Compensation Details: Headcount Planning in the Adaptive Planning for the Workforce functional area. Gives view access to users that need to view compensation data on headcount plans, headcount forecast plans, and reports.
- Ensure that you include all plan participant security groups on the Shared Participation Step of the Headcount Planning business process.

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

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Bottom-Up Workforce Planning: Hierarchical Routing, cont.

Additional Considerations

Workday delivers a new Manager for Superior Event report field on the Headcount Planning Participant Detail Event business object (secured to the Public Reporting Items domain) that you can use in custom reports and business process rules for the person who manages the Headcount Planning Participant Detail Event that's superior to this event.

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

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Bottom-Up Workforce Planning: Hierarchical Routing

Impact analysis

Before the release	After the release
N/A	N/A

Impact description
This extends your bottom-up workforce planning activities up your organization hierarchy so that upper-level managers can review and modify their team's headcount plans.

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

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Automatically Available

Bottom-Up Workforce Planning

What's Changing

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

Additional Considerations

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

On the initial prompt page of these tasks, workday now displays an error message if no headcount planning

What do I need to do

N/A

What happens If I do nothing

N/A

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

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Bottom-Up Workforce Planning, cont.

Additional Considerations

integration system user exists:

- Configure Headcount Plan
- Create Headcount Forecast

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

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

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

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

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Bottom-Up Workforce Planning

Impact analysis

Before the release	After the release
N/A	N/A

Impact description
By ensuring that you set up your headcount planning integration system user, this feature helps prevent downstream issues when you create your headcount and headcount forecast plans. The additional validation messages help you troubleshoot and prevent downstream issues when you create plans. The clearer background job statuses help you troubleshoot by giving you more information about what happened after you try to create headcount and headcount forecast plans.

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

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Perspective Favorites in Dashboards

What's Changing

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

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

What do I need to do

N/A

Additional Considerations

You can now favorite a perspective.

What happens If I do nothing

N/A

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

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Perspective Favorites in Dashboards

Impact analysis

Before the release	After the release
N/A	N/A

Impact description
Introducing favorites for perspectives helps you locate the perspectives you care about most.

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

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Add Reports on Dashboards

What's Changing

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

Additional Considerations

You can add a report with a maximum of 1 million cells to a dashboard.

When viewing reports from dashboards, you can:

- Download, share, and add report or line notes.
- Drill down by available dimensions.

What do I need to do

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

- Access Dashboards > Edit Dashboards.
- Access Reports.

When adding reports to dashboards, workday recommends that you:

What happens If I do nothing

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

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

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Add Reports on Dashboards, cont.

Additional Considerations

- Drag and resize reports.
- Copy and paste reports within and across dashboards.
- Use grid mode to expand reports and view the full toolbar.
- Enable report parameters to sync with the dashboard perspective context filters

What do I need to do

- Load a maximum of 4 reports at a time, 2 on each row. Where possible, add reports to other dashboards in a perspective.
- Assess the complexity of the reports as high dimensionality reports can cause slower performance.
- Add and load a report first before adding a second report.
- Add a maximum of 2 sheets on the dashboard.
- Sync a maximum of 10 report parameter types.

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

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Add Reports on Dashboards

Impact analysis

Before the release	After the release
N/A	N/A

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

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

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Reporting in Billions

What's Changing

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

What do I need to do

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

Additional Considerations

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

What happens If I do nothing

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

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

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Reporting in Billions

Impact analysis

Before the release	After the release
N/A	N/A

Impact description
This feature enables you to report on larger magnitudes of data.

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

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Report Parameter Behavior

What's Changing

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

What do I need to do

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

Additional Considerations

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

- If all the values except the (only) and (uncategorized) are selected, then any new values are automatically selected as available choices.

What happens If I do nothing

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

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

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Report Parameter Behavior, cont.

Additional Considerations

- Irrespective of whether you add the parameters from the report filters or the report rows and columns, the behavior is now consistent.

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

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Report Parameter Behavior

Impact analysis

Before the release	After the release
N/A	N/A

Impact description
You can now: • Create report parameters consistently, regardless of how you add them. • Automatically include new values as available.

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

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Report Bursting Through Scheduled Attachments

What's Changing

With this release, Workday enables you to schedule and distribute one report to multiple users using the recipient’s data access. Each recipient receives their own slice of the report based on their access.

Additional Considerations

You can:

- Schedule matrix and model reports as Excel attachments in email notifications. Recipients can then download the attached report from their email notifications.

What do I need to do

You need to:

- Enable attachments with scheduled notifications from Administration, General Setup. After enabling the feature, you can schedule and distribute matrix and model report notifications with attachments. Optionally, you can enforce password protection on the schedule.
- Have these permissions assigned for scheduling

What happens If I do nothing

If you don't turn on the Enable attachments with scheduled notifications feature, you'll see no changes in Adaptive Planning. The ability to schedule and distribute reports as attachments won't be available to you.

https://doc.workday.com/release-notes/en-us/plnrptinfra/8729592.html

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Report Bursting Through Scheduled Attachments, cont.

Additional Considerations

- Schedule and distribute one report to multiple users using recipient's data access for up to 250 users in a single schedule.
- Distribute reports based on specific parameters or dimensions.

Example: You create a repeating report where you organize data using levels as sheet tabs. You also ensure that the report recipients have access to the data you intend for them to see. Next, you schedule to distribute this report based on the recipient's access. In this case, each recipient only sees data for the level or sheet tab that they have access to.

What do I need to do

reports:

- Create Report Schedules.
- Send Attachments in Notifications.
- (Optional) Manage all Report Schedules.
- Download to Excel. Both schedulers and recipients need this permission.
- Verify that email IDs exist for the notification recipients.
- Configure Notifications and create Notification Routing Rules to receive report notification emails with attachments from Workday-enabled Adaptive Planning instances. See Steps: Set Up Workday Notifications.

https://doc.workday.com/release-notes/en-us/plnrptinfra/8729592.html

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Setup required

Report Bursting Through Scheduled Attachments

Impact analysis

Before the release	After the release
N/A	N/A

Impact description
Report recipients can review report results in the convenience of their email notification without having to navigate to the application.

https://doc.workday.com/release-notes/en-us/plnrptinfra/8729592.html

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Forecast Explanations for Predictive Forecaster

What's Changing

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

Additional Considerations

Workday provides a new option, Forecast Explanation, in the Forecast section of new and edited forecasts.

When you enable the Forecast Explanation check box, workday provide these new items in the Confidence Metrics tab of the Forecast History page:

What do I need to do

To enable the feature for existing forecasts:

- From the main menu, select Modeling.
- Select Predictive Forecaster.
- Hover over the forecasts in the list to access the More Actions menu.
- Click the 3 dots that display and select Edit.

What happens If I do nothing

N/A

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

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Forecast Explanations for Predictive Forecaster, cont.

Additional Considerations

Contribution Breakdown of Forecast Components: A visual representation of how seasonality, trend, and residual components (when applicable) contribute to the forecasted values.

Forecast Explanation: Text describing the chart components.

You can access the Confidence Metrics when you view the history of a completed forecast the history of a completed forecast.

What do I need to do

- In the Forecast section, select Forecast Explanation.
- Select Run or Save to run it later.
- To review the forecast explanations:
- After the forecast runs successfully, select Modeling from the main menu.
- Hover over the forecasts in the list to access the More Actions menu.
- Click the 3 dots that display and select View History.
- Select the Confidence Metrics tab.

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

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Forecast Explanations for Predictive Forecaster

Impact analysis

Before the release	After the release
N/A	N/A

Impact description
Forecast Explanation helps demystify machine learning predictions. Visual representations enable you to review the factors that influenced each prediction.

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

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Advance Compensation

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Infinite Scrolling on Compensation Review Grid

What's changing

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

Additional considerations

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

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

- Compensation Review Organization Summary Mass Action for Data Paging: to enable planners of the process to view more than 500 employees in the search report.

What do I need to do

Nothing, the change is automatically available.

What happens if I do nothing

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

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

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Infinite Scrolling on Compensation Review Grid, cont.

Additional considerations

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

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

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

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

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Automatically available

Infinite Scrolling on Compensation Review Grid

Impact analysis

Before the release	After the release
The maximum limit on the **Preferred Compensation Review Employee Awards Grid** is only up to **500.**	The maximum limit on the **Preferred Compensation Review Employee Awards Grid** is now increased up to 2000 enabling infinite scrolling and improves performance and makes assessing employees more intuitive.

Impact description
No Impact- Workday will still displays the compensation review grid for the first group of 50 rows unless you configure and increase the maximum limit.

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

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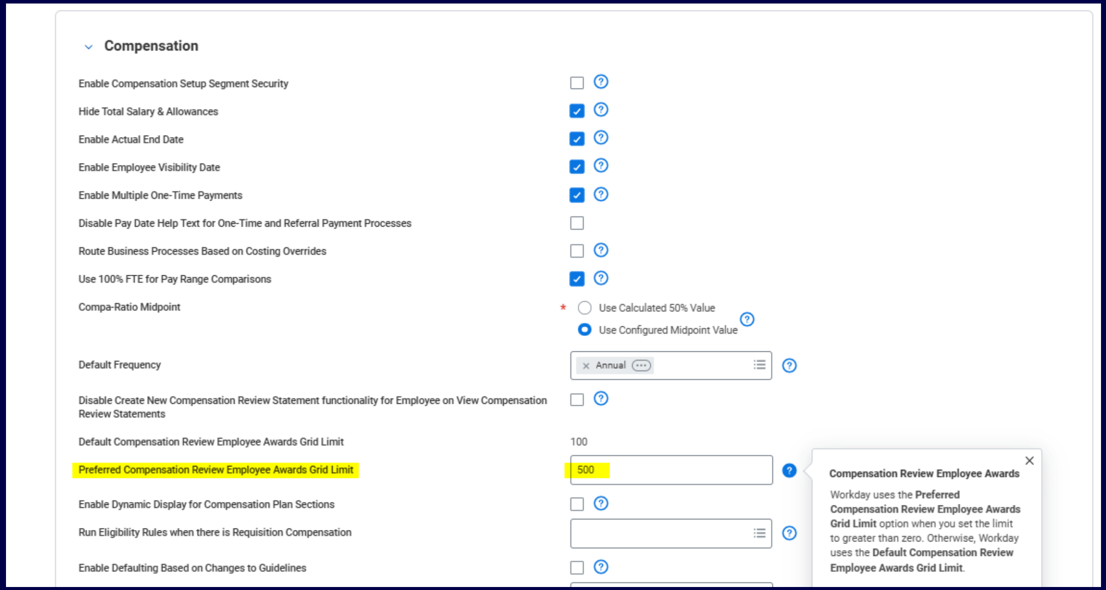
Automatically available

Infinite Scrolling on Compensation Review Grid

Impact analysis

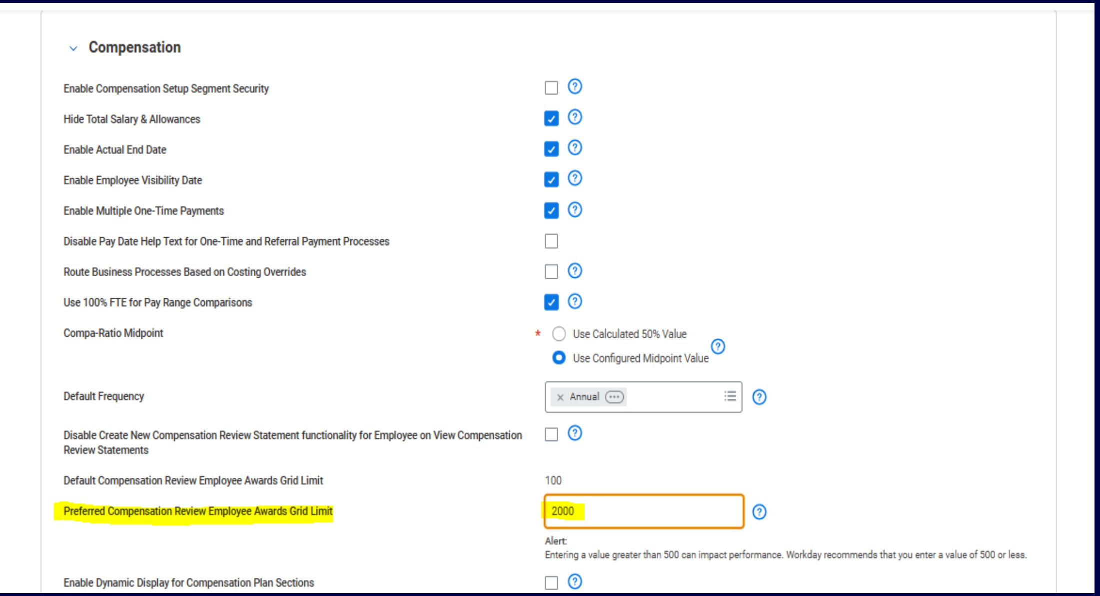
Before the release

Edit Tenant Setup - HCM



After the release

Edit Tenant Setup - HCM



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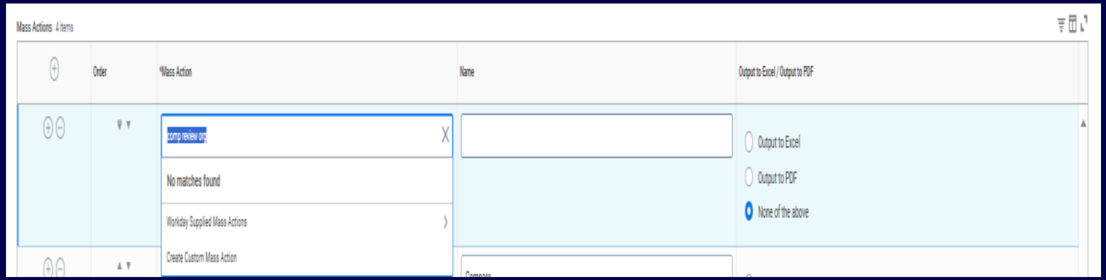
Infinite Scrolling on Compensation Review Grid

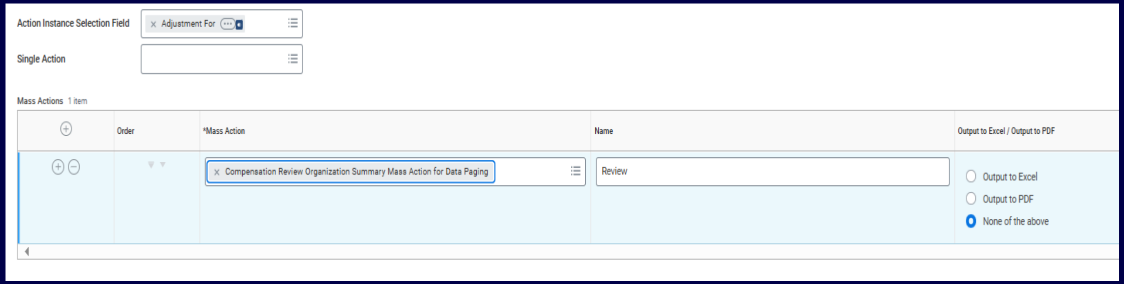
Impact analysis

Before the release



After the release

- Mass action for Data Paging is now available on search custom report.



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Configurable Visibility of Pools and Budget Wheels in Compensation Reviews

What's changing

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

What do I need to do

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

Additional Considerations

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

Workday also hide pool and budget data from the:

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

What happens if I do nothing

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

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

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Setup required

Configurable Visibility of Pools and Budget Wheels in Compensation Reviews

Impact analysis

Before the release	After the release
You cannot hide compensation review pool and budget wheel graphics from target populations of compensation review users.	You can now hide compensation review pool and budget wheel graphic from target population by removing security groups from the new security domain.

Impact description
No Impact- Workday assigns security groups with access to view pool data and budget wheels to the new domain to maintain your current access.

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

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Setup required

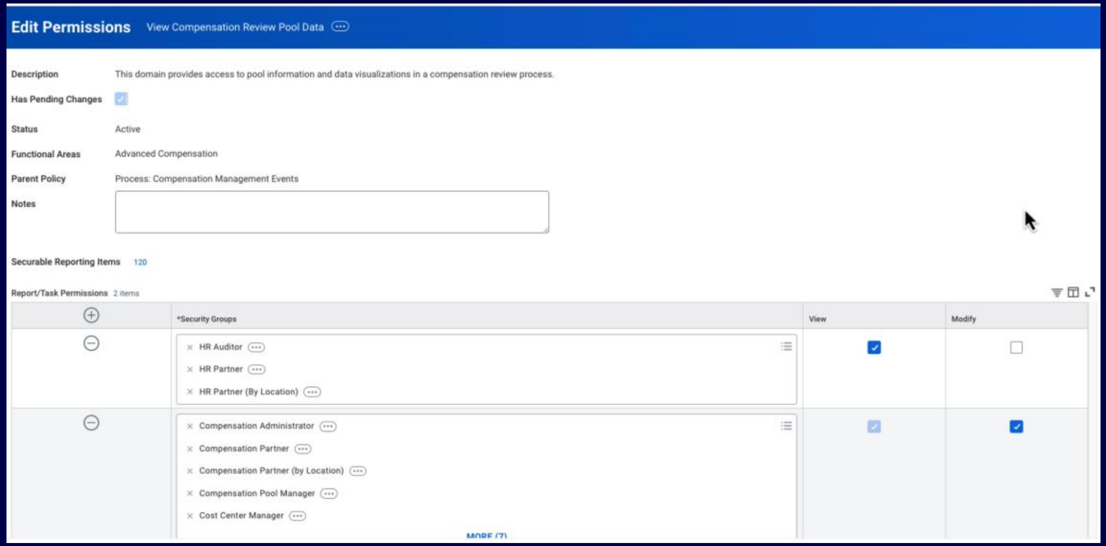
Configurable Visibility of Pools and Budget Wheels in Compensation Reviews

Impact analysis

Before the release

- *View Compensation Review Pool Data* domain is not yet available.

After the release



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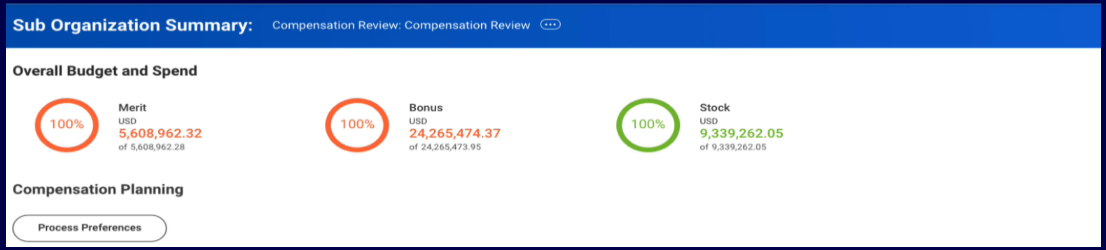
Setup required

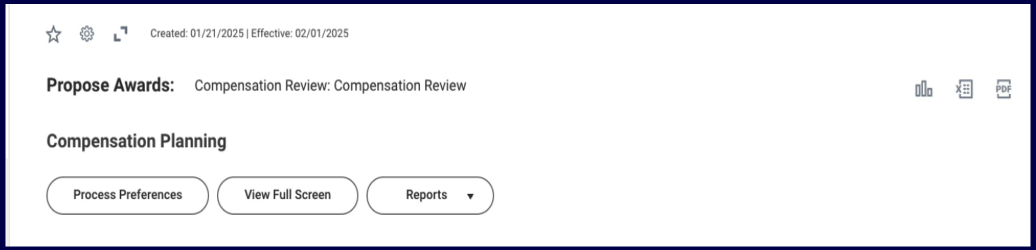
Configurable Visibility of Pools and Budget Wheels in Compensation Reviews

Impact analysis

Before the release



After the release



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Banking and Cash Management

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Bank Accounts Associated to Company Hierarchy for Workday Bank Connectivity

What’s changing

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

Additional considerations

Legal Owning Company Field

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

- Create Bank Account
- Edit Bank Account.

What do I need to do

N/A

What happens if I do nothing

N/A

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

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Bank Accounts Associated to Company Hierarchy for Workday Bank Connectivity, cont.

Additional considerations

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

Bank Account Web Services

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

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

Bank Account Business Processes

Workday now displays the new Legal Owning Company field on these business processes.

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

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Bank Accounts Associated to Company Hierarchy for Workday Bank Connectivity, cont.

Additional considerations

when you select a company hierarchy as the organization for a bank account:

- Review Bank Account
- Revise Bank Account

Legal Owning Company Report Field

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

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

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

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Bank Accounts Associated to Company Hierarchy for Workday Bank Connectivity

Impact analysis

Before the release	After the release
Earlier, if you created a Bank account for the Company Hierarchy, Workday did not have the option to select an owning company for the bank account.	You can now select a company in the hierarchy as the owning company for the bank account. Workday uses this company as referential data to integrate company-hierarchy owned accounts in the Kyriba system.

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

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

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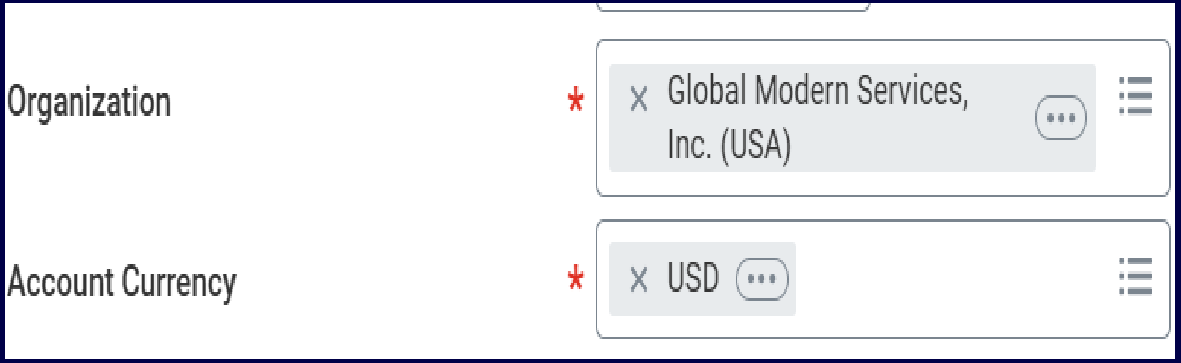
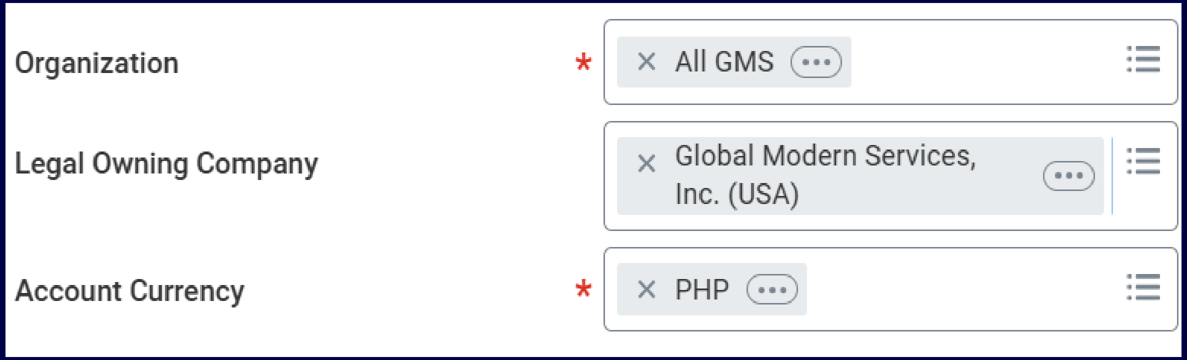
Bank Accounts Associated to Company Hierarchy for Workday Bank Connectivity

Impact analysis

Before the release



After the release



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Submit Ad Hoc Bank Transaction SOAP Web Service

What's changing

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

What do I need to do

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

Additional considerations

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

See the SOAP API Change Log link under Related Information.

What happens if I do nothing

Requests with more than 1000 lines will be rejected.

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

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Submit Ad Hoc Bank Transaction SOAP Web Service

Impact analysis

Before the release	After the release
Earlier the maximum number of line was capped around 500	Workday updates the v44.0 Submit Ad Hoc Bank Transaction web service to now allow a maximum of 1000 transaction lines per request.

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

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

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Bank Account Number Format Validators

What's changing

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

Additional considerations

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

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

What do I need to do

N/A

What happens if I do nothing

N/A

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

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Bank Account Number Format Validators

Impact analysis

Before the release	After the release
Workday used to offer no filters for the Bank Account Number Options section of the Create Payee Bank Account Validation Override.	Workdays added the new filters to the Format Validator prompt in the Bank Account Number Options section of the Create Payee Bank Account Validation Override task: Workday Recommended & Other Validations

Impact description
Workdays add these new filters to the Format Validator prompt in the Bank Account Number Options section of the Create Payee Bank Account Validation Override task: Workday Recommended & Other Validations

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

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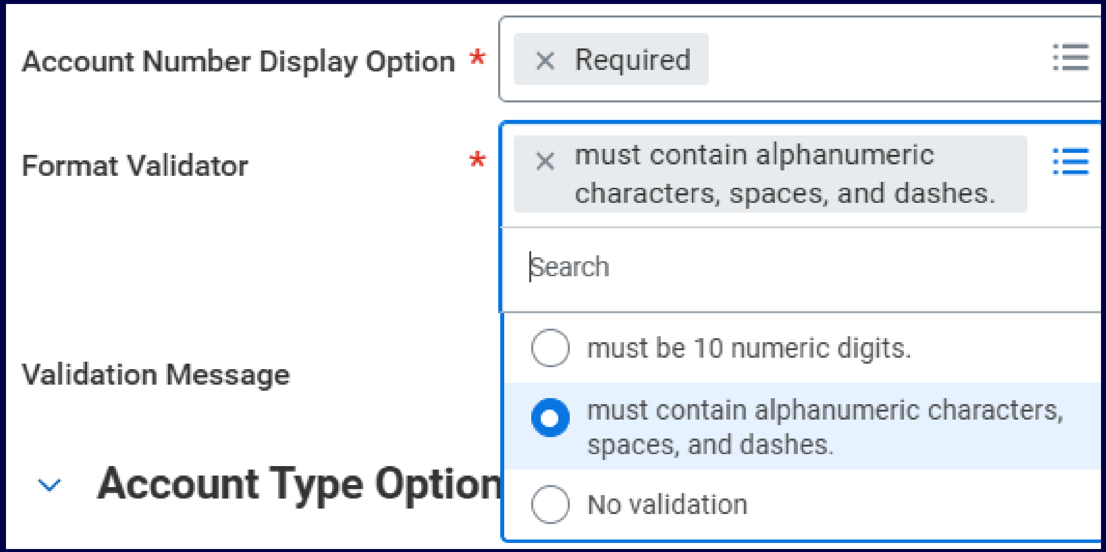
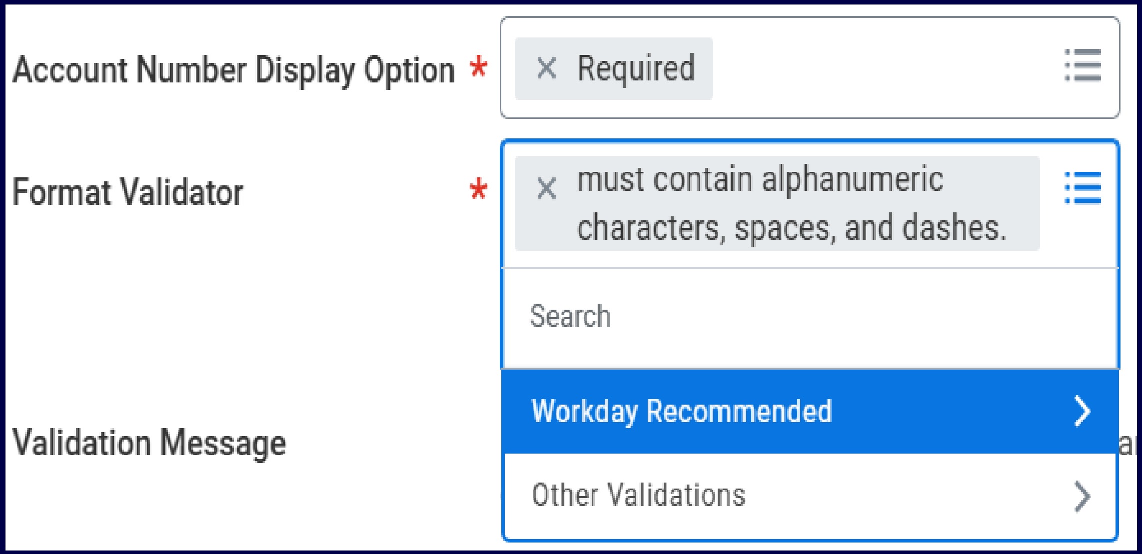
Bank Account Number Format Validators

Impact analysis

Before the release



After the release



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Bank Routing Rule Web Services

What's changing

Workday delivers new bank routing rule web services that you can use to import and export bank routing rules in bulk.

What do I need to do

Grant security access for the new web services.

Additional considerations

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

- Get Bank Routing Rule
- Put Bank Routing Rule

What happens if I do nothing

N/A

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

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Bank Routing Rule Web Services

Impact analysis

Before the release	After the release
Earlier Workday did not have a Web Service for Bank Routing Rules.	Workday delivers these new bank routing rule web services.

Impact description
You can now use publicly-available web services to maintain bank routing rules, saving you time and effort when adding or updating bank accounts used for settling payments.

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

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Setup required

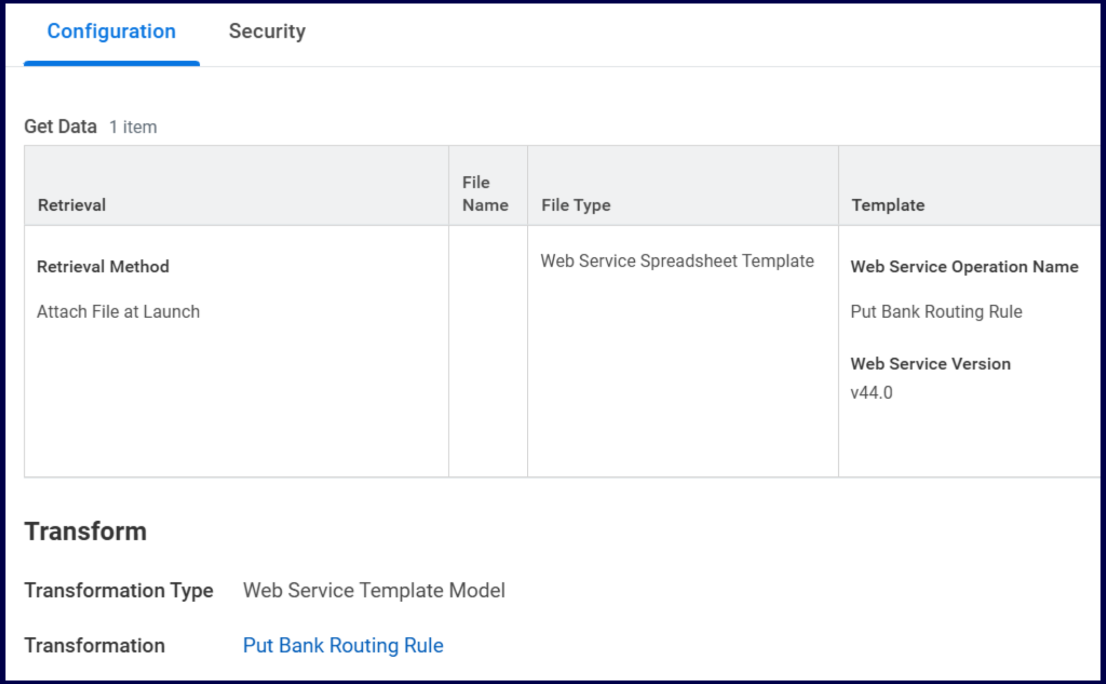
Bank Routing Rule Web Services

Impact analysis

Before the release

- Earlier Workday did not have a Web Service for Bank Routing Rules.

After the release



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Additional Settlement Run Advanced Filters

What's changing

Workday expands the advanced settlement filtering for payment categories by enabling you to now select open intercompany transactions as well as on-cycle and off-cycle payroll payments in settlement runs using reporting capabilities.

Additional considerations

Reports for Settlement Run Filters

Workday delivers these new standard reports that you can use to create a settlement run report filter:

- All Available Pay Groups for Settlement
- All Available Pay Group Exceptions for Settlement

What do I need to do

Copy a standard report to create a custom report using the Copy Standard Report to Custom Report task.

Update the custom report filter conditions using delivered and calculated fields to return the open items that you want to select for settlement.

Create your settlement run filter using the Create Settlement Run Report Filter task.

You can create calculated date fields using the Settlement Run Date report field on the Global business object to evaluate against your intercompany transactions and payroll payment dates. This enables you to only select the transactions that meet your criteria for payment.

https://doc.workday.com/release-notes/en-us/finset/8428679.html

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Additional Settlement Run Advanced Filters, cont.

Additional considerations

The reports are secured to these domains:

- Process: Payroll Settlement
- Process: Settlement

When you use the reports for the settlement run report filter, the:

- All Available Pay Groups for Settlement report returns all payroll payments with a payment category of on-cycle.
- All Available Pay Group Exceptions for Settlement report returns all payroll payments with a payment category of off-cycle.

Workday also delivers the new All Available Intercompany Items for Settlement standard report, secured to these domains:

What do I need to do

When you create a custom report, you'll need to share it with all authorized users. This enables users to see the related actions on the settlement run report filter.

You can run the custom report that's used in the settlement run report filter independently to preview the filtered results in a settlement run.

What happens if I do nothing

If you choose to do nothing, you won't be able to use settlement run report filters.

https://doc.workday.com/release-notes/en-us/finset/8428679.html

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Additional Settlement Run Advanced Filters, cont.

Additional considerations

- Process: Intercompany Payment/Settlement
- Process: Settlement

You can use the report to create a settlement run report filter to return all intercompany open items.

Also, you can copy all of the reports to create custom reports with new filter criteria that meet your requirements.

Report Data Source Filters for Open Items

Workday delivers a new report data source (RDS) filters, enabling you to return on-cycle or off-cycle payroll payments available for settlement.

Workday also delivers the new Open Intercompany Items for Settlement Run RDS filter on the Intercompany Transactions RDS that you can use to return open intercompany items.

https://doc.workday.com/release-notes/en-us/finset/8428679.html

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Additional Settlement Run Advanced Filters, cont.

Additional considerations

Settlement Run Report Filter Report Fields

Workday delivers these new report fields on the Payroll Run Detail Company business object (secured to the Public Reporting Items domain) that you can use in custom reports to filter open payable items in the settlement run:

- Currency
- Currency to Settle
- Pay Group Detail
- Payment Date
- Period

Workday also delivers the new Withheld Tax Amount report field on the Intercompany Transaction business object.

https://doc.workday.com/release-notes/en-us/finset/8428679.html

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Setup required

Additional Settlement Run Advanced Filters

Impact analysis

Before the release	After the release
Before this release All Available Pay Groups for Settlement, All Available Pay Group Exceptions for Settlement and All Available Intercompany Items for Settlement standard reports are not available for create a settlement run report filter	With this release All Available Pay Groups for Settlement, All Available Pay Group Exceptions for Settlement and All Available Intercompany Items for Settlement standard reports are not available for create a settlement run report filter and enabling you to return on-cycle or off-cycle payroll payments available for settlement

Impact description
This enhancement provides you with more granular control over payable documents that you're settling, greater flexibility in filtering open items, and extended use for your custom report fields.

https://doc.workday.com/release-notes/en-us/finset/8428679.html

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Setup required

Additional Settlement Run Advanced Filters

Impact analysis

Before the release

Backend Improvement

After the release

Settlement Run Report Filter	
Settlement Run Report Filter Name	Pay Group Exceptions
Payment Source	Pay Group Exception
Report Definition	All Available Pay Group Exceptions for Settlement

Settlement Run Report Filter	
Settlement Run Report Filter Name	Pay Groups
Payment Source	On-Cycle Payroll
Report Definition	All Available Pay Groups for Settlement

Settlement Run Report Filter	
Settlement Run Report Filter Name	Intercompany
Payment Source	Intercompany Item
Report Definition	All Available Intercompany Items for Settlement

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Benefits

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SOAP Import Web Services for Benefits

What’s changing

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

What do I need to do

Nothing

Additional considerations

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

What happens if I do nothing

Nothing

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

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SOAP Import Web Services for Benefits

Impact analysis

Before the release	After the release
Import 1095-C Form Recipients Data Web Service may take some time to complete.	Quicker processing and less time spent waiting for imports to complete.

Impact description
Optimized Import 1095-C Form Recipients Data web service for faster data import.

[link to release note in community]

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Mobile Benefits UI Rearchitecture

What's changing

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

Additional considerations

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

What do I need to do

Nothing. This feature is automatically available.

What happens if I do nothing

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

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

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Mobile Benefits UI Rearchitecture, cont.

Additional considerations

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

- Dynamic text resizing
- Voice over and talk back
- Translation to languages other than U.S. English (based on the user's profile settings)

The Generalized UI solution will continue to be improved upon and kept up to date with new accessibility improvements.

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

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Mobile Benefits UI Rearchitecture

Impact analysis

Before the release	After the release
View expanded details for a benefit plan from the Benefit Elections page.	Workday improve the worker's experience of managing their benefits with the card framework, providing a quick-glance view that is consistent throughout Benefits. Workday updates the worker's view of their current benefit elections from the grid to the card format in these locations: * The Benefit Election tab in the Benefits and Pay Hub. * The Benefits tab in the worker’s Profile. * The Current Benefit Elections page, when you select Benefits > View My Current Benefit Elections from the related actions menu of worker's Profile. Workers can click the new View as Grid button to see their elections as a grid and to print or download as a spreadsheet.

Impact description
This feature provides an improved user experience by having a more detailed Benefits Election page.

[link to release note in community]

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Automatically available

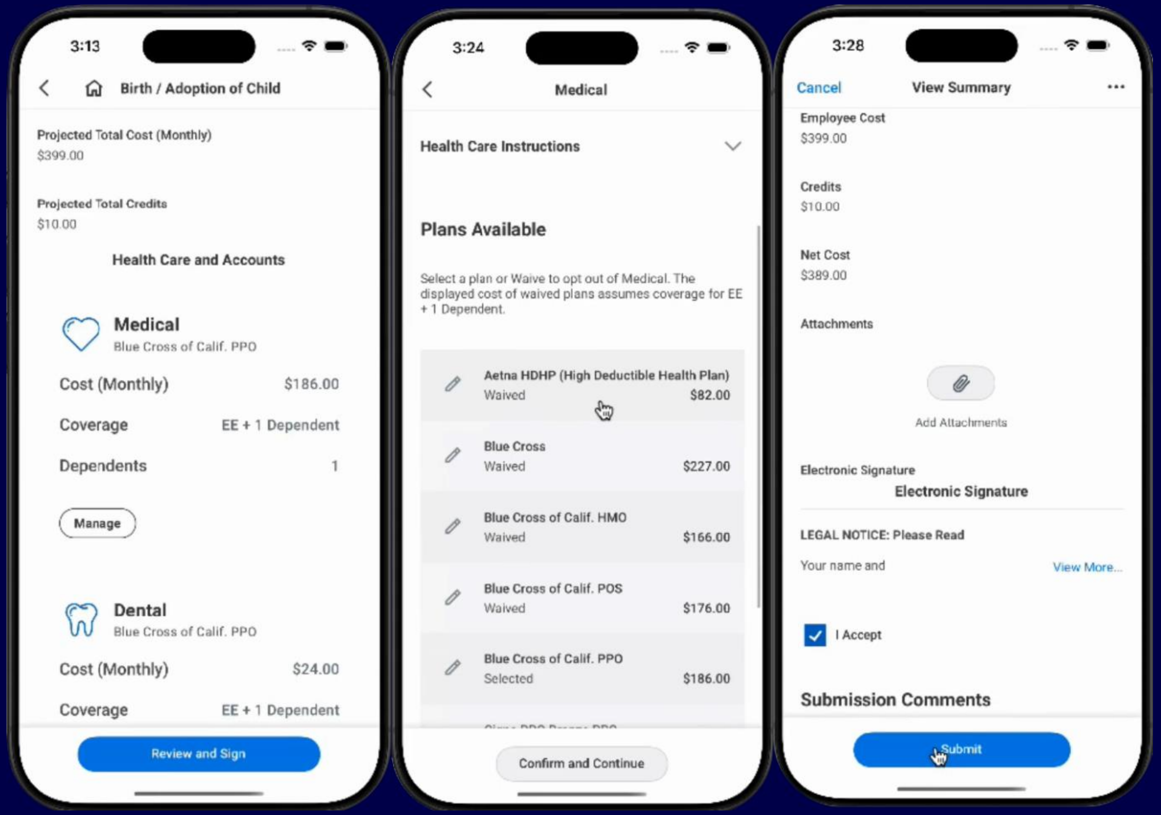
Mobile Benefits UI Rearchitecture

Impact analysis

Before the release

N/A

After the release



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Purge Dependents and Beneficiaries for Active Workers

What's changing

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

Additional considerations

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

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.

(Optional) Create a purge plan.

Note: If you don't create a purge plan, Workday will automatically select required purgeable data types to purge.

Run the Purge Person Data task to purge the data or use a MOM (Mass Operation Management) task to purge the data.

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

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Purge Dependents and Beneficiaries for Active Workers, cont.

Additional considerations

Workday added 1 purgeable data type: Workers Dependents and Beneficiaries.
This feature is available only by request, as purging this data is irreversible and can cause issues if done incorrectly. Contact Workday Support to request that they enable the Workers Dependent and Beneficiary purgeable data type to your tenant.

What happens if I do nothing

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

What do I need to do

Best Practice: To avoid affecting payroll, integrations, and reporting, Workday strongly recommends that you don't purge dependents or beneficiaries that are active in current elections. If you choose to purge active dependents or beneficiaries, Workday deletes all the dependent and beneficiary data from the election, but the coverage target doesn't change.

Example: If you purge dependents for a worker with an EE + Family coverage, that coverage target will remain as elected even if dependents are purged.

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

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Purge Dependents and Beneficiaries for Active Workers

Impact analysis

Before the release	After the release
Previously, you could only purge dependents and beneficiaries for terminated workers.	You can now purge all dependents and beneficiaries for a selected set of active workers with the Purge Person Data task. After purging workday will remove all the references from the tenant related to that person

Impact description
This feature helps comply with privacy regulations and data protection laws.

[link to release note in community]

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Benefit Credit Offsets for Workday Payroll

What's changing

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

Additional considerations

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

- Benefits: Total Benefit Credits - Identifies the total number of benefit credits awarded for any combination of benefit group, benefit plan, and benefit coverage type credits associated with an earning or deduction.
- Benefits: Benefit Credit Election Offset - Identifies the total number of benefit credits used to offset the cost of an election associated with an earning or deduction.

What do I need to do

Benefits Configuration:

1. Access the Edit Benefit Group task and select a benefit group. On the Benefit Credits tab, select the Enable Remaining Benefit Credits check box.
2. Set up benefit credits. You can set up benefit credits by:
    - Accessing the Edit Benefit Plan task and configuring benefit credits to apply to the plan elections.
    - Accessing the Edit Benefit Group task. On the Benefit Credits tab, configure benefit credits applicable to the group. In the Offset Deductions with Benefit Credits grid, add the coverage types that you want the benefit group and remaining plan credits to offset.

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

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Benefit Credit Offsets for Workday Payroll, cont.

What do I need to do

Payroll Configuration:

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

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

1. Create or edit an earning.
2. On the Effective Dated tab, add the Benefits: Total Benefit Credits IVC in a calculation. On the Non-Effective Dated tab, configure the associated benefit plans and group credits that contribute to the credit total.

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

1. Create or edit a deduction.

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

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Benefit Credit Offsets for Workday Payroll, cont.

What do I need to do

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

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

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

What happens if I do nothing

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

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

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Setup required

Benefit Credit Offsets for Workday Payroll

Impact analysis

Before the release	After the release
Benefit Offsets can be seen during the worker’s enrollment event	Workday can now calculate benefit credit offsets via earnings and deductions in payroll

Impact description
This feature allows you to configure benefit credits in Payroll to more easily offset the cost of a worker’s benefit election.

[link to release note in community]

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Compensation

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Administrator Security for Compensation

What's changing

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

Additional considerations

Workday updates the security evaluation for these reports:

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

What do I need to do

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

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

What happens if I do nothing

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

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

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Automatically available

Administrator Security for Compensation

Impact analysis

Before the release	After the release
Some administrators may see changes in their access to sensitive worker compensation information.	Secures sensitive worker compensation information.

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

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

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Percent-Based Commission Plans for MBT and Web Services

What's changing

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

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

Additional considerations

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

What do I need to do

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

What happens if I do nothing

Nothing. Workday works the same as in previous updates.

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

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Percent-Based Commission Plans for MBT and Web Services, cont.

Additional considerations

Workday also updates these web services to support MBT:

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

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

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Percent-Based Commission Plans for MBT and Web Services

Impact analysis

Before the release	After the release
This option was not available	You can now include percent-based commission plans as part of an MBT compensation basis. Also, workday updates web services to support percent-based commission plans.

Impact description
This is an enhancement provided by Workday who had set up the percentage-based Commission plan and using MBT. For others there is no change.

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

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Increased Flexibility for Compa-Ratio and Position in Range Fields

What's changing

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

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

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

What do I need to do

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

What happens if I do nothing

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

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

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

Additional considerations

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

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

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

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

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

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

Additional considerations

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

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

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

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

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Increased Flexibility for Compa-Ratio and Position in Range Fields

Impact analysis

Before the release	After the release
Options to the Edit Compensation Package Analytics task: 1. Hide Compa-Ratio. 2. Hide Compensation Package Analytics.	Added these 2 new options to the **Edit Compensation Package Analytics** task: 1. Display Compa-Ratio 2. Display Position in Range Hide Compa-Ratio and the Hide Compensation Package Analytics options were removed. **Compa-Ratio** and **Position in Range** fields were also added to the Total Base Pay and Primary Compensation Basis tasklets during the *Hire, Add Additional Job,* and *Start International Assignment* processes.

Impact description
You will now have options to Display Compa-Ratio and/or Display Position in Range 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

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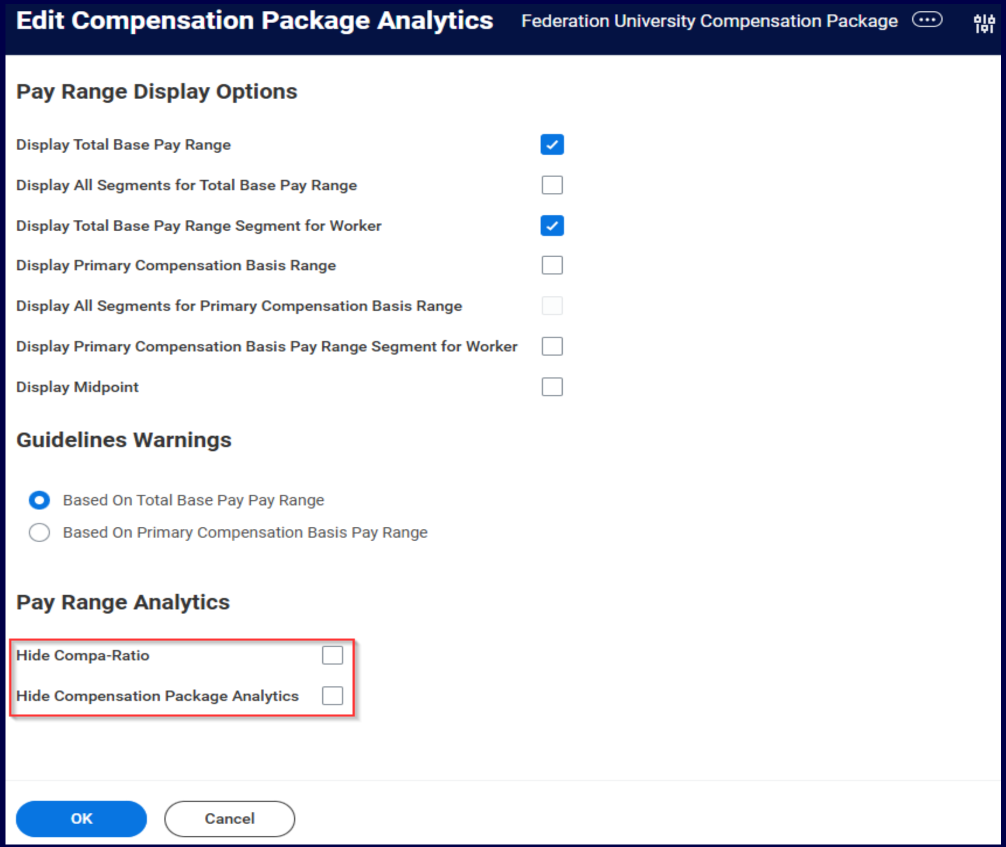
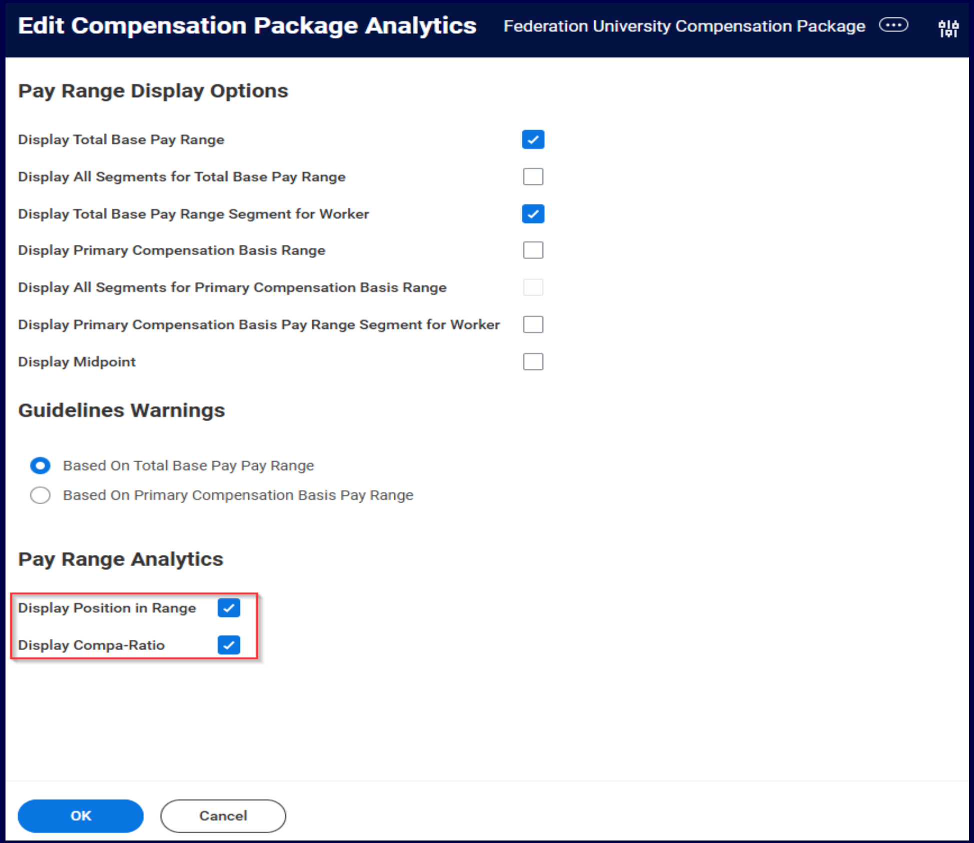
Increased Flexibility for Compa-Ratio and Position in Range Fields

Impact analysis

Before the release



After the release



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

What's changing

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

What do I need to do

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

Additional considerations

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

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

What happens if I do nothing

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

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

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Automatically available

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

Impact analysis

Before the release	After the release
N/A	You can enable Personnel Action Request (PAR) business process as a subprocess of these web services: Request Compensation Change and Request One-Time Payment

Impact description
This is an enhancement provided by Workday who is using. For others there is no impact.

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

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Total Rewards Template Conversion

What’s changing

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

Additional considerations

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

What do I need to do

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

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

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

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

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Total Rewards Template Conversion, cont.

Additional considerations

• Configure non-currency section groups that display values without specifying a currency.

• Delete templates and sections.

• Add your company's logo to the Total Reward. Statement using the Configure Tenant Branding task. Workday also remove the header image. If you configure tenant branding, the image you select displays on the statement. If not, Workday doesn't display an image for the header.

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

What happens if I do nothing

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

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

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Setup required

Total Rewards Template Conversion

Impact analysis

Before the release	After the release
2024R1 and later template format would be available in the tenant, which would be incompatible.	You can now convert total rewards templates created before Workday 2024R1 to the new template format (2024R1 and later).

Impact description
Pre-2024R1 templates remain incompatible with the 2024R1 and later template format.

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

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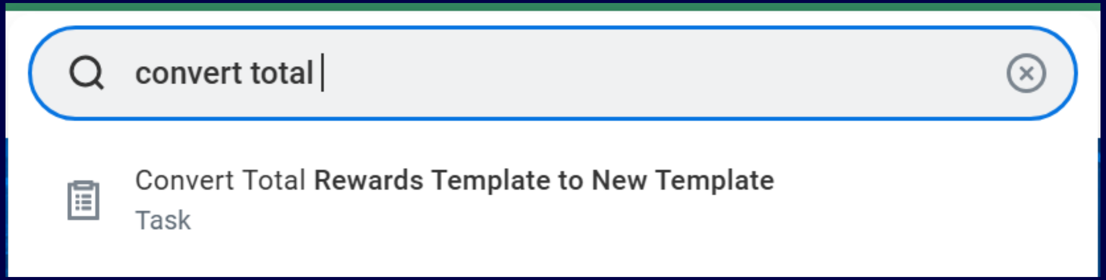
Total Rewards Template Conversion

Impact analysis

Before the release

N/A

After the release



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Defaulting Based on Changes to Guidelines

What's changing

Workday 2025R1 increases the flexibility of the Enable Defaulting Based on Changes to Guidelines tenant option. You can now apply the option to 1 or more business processes.

Additional considerations

- Workday 2025R1 updates the Enable Defaulting Based on Changes to Guidelines option in the Compensation section on the Edit Tenant Setup - HCM task. You can now select 1 or more of these business processes that the option applies to:

• Add Additional Job (Propose Compensation Hire).

• Change Job (Propose Compensation Change).

• Employment Agreement (Propose Compensation Offer/Employment Agreement).

• Hire (Propose Compensation Hire).

What do I need to do

If you originally had this setting selected, Workday displays Change Job (Propose Compensation Change) for the Business Process. If you want this capability applied to other processes, you must select them from the list.

What happens if I do nothing

Nothing. Workday honors your existing configuration.

https://doc.workday.com/release-notes/en-us/hrcomp/8481747.html

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Defaulting Based on Changes to Guidelines, cont.

Additional considerations

- Job Requisition (Requisition Compensation).
- Job Requisition Change (Requisition Compensation).
- Offer (Propose Compensation Offer/Employment Agreement).

https://doc.workday.com/release-notes/en-us/hrcomp/8481747.html

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Defaulting Based on Changes to Guidelines

Impact analysis

Before the release	After the release
If you originally had this setting selected, Workday displays *Change Job (Propose Compensation Change)* for the **Business Process**.	There is a possibility to apply this to other processes, based on your selection from the list.

Impact description
Increases flexibility to choose specific business processes to apply compensation defaulting within the Compensation section.

[link to release note in community]

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Templates for Propose Compensation Hire

What's changing

Workday continue enhancements to the manager experience for Compensation first delivered with Workday 2024R1 for the Propose Compensation Change business process.

Note: To use compensation change templates for Hire, you must consolidate the Propose Compensation Hire business process with the Hire business process and use the enhanced user interface for Hire.

Additional considerations

- Workday enables you to configure compensation change templates for the Propose Compensation Hire business process within Hire.

What do I need to do

Access the Maintain Compensation Change Templates task to configure the display of specific sections and fields for Propose Compensation Hire within the enhanced user interface for Hire.

What happens if I do nothing

Nothing. Workday works the same as in previous updates.

https://doc.workday.com/release-notes/en-us/hrcomp/8692839.html

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Setup required

Templates for Propose Compensation Hire

Impact analysis

Before the release	After the release
N/A	You can configure compensation change templates for the Propose Compensation Hire business process within Hire.

Impact description
Nothing. Workday works the same as in previous updates.

https://doc.workday.com/release-notes/en-us/hrcomp/8692839.html

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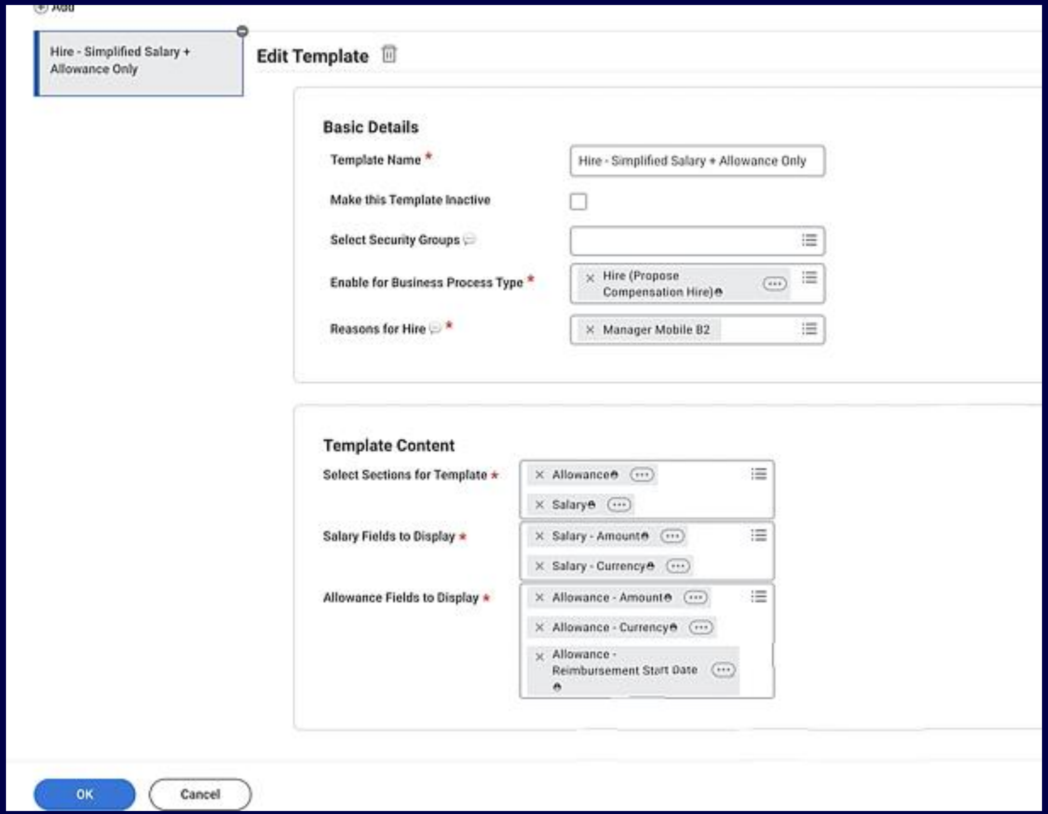
Templates for Propose Compensation Hire

Impact analysis

Before the release

N/A

After the release



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Individual Target Improved User Interface for Funded Plans

What's changing

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

Additional considerations

- Workday 2025R1 adds the new Plan Target and Specify Target Override options to the Compensation Plan tasklets on these business processes using the enhanced compensation change interface:
- Change Job.
- Hire.
- Request Compensation Change.
- Workday automatically defaults the selection to Plan Target, unless there is an Individual Target specified.

What do I need to do

Use the enhanced user interface for these business processes:

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

What happens if I do nothing

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

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

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Individual Target Improved User Interface for Funded Plans , cont.

Additional considerations

When you select Plan Target, the Individual Target value remains visible but non-editable. When you select Specify Target Override, you must enter an Individual Target value greater than 0.
If the plan doesn't allow overrides, Workday displays only the Plan Target option.
These new options comply with the Hide Funded Plan Target and Configure Optional Fields features.

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

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Setup required

Individual Target Improved User Interface for Funded Plans

Impact analysis

Before the release	After the release
Only individual target% field available for funded plans.	You can now select either the plan target or specify a target override for bonus, merit, and stock plans.

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

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

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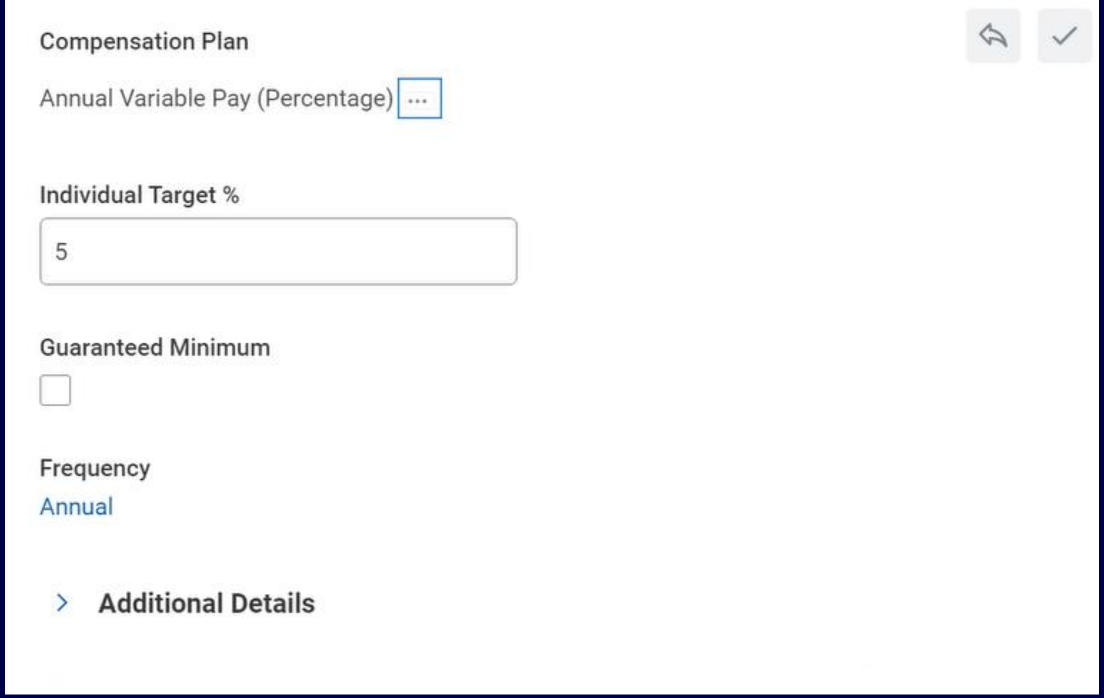
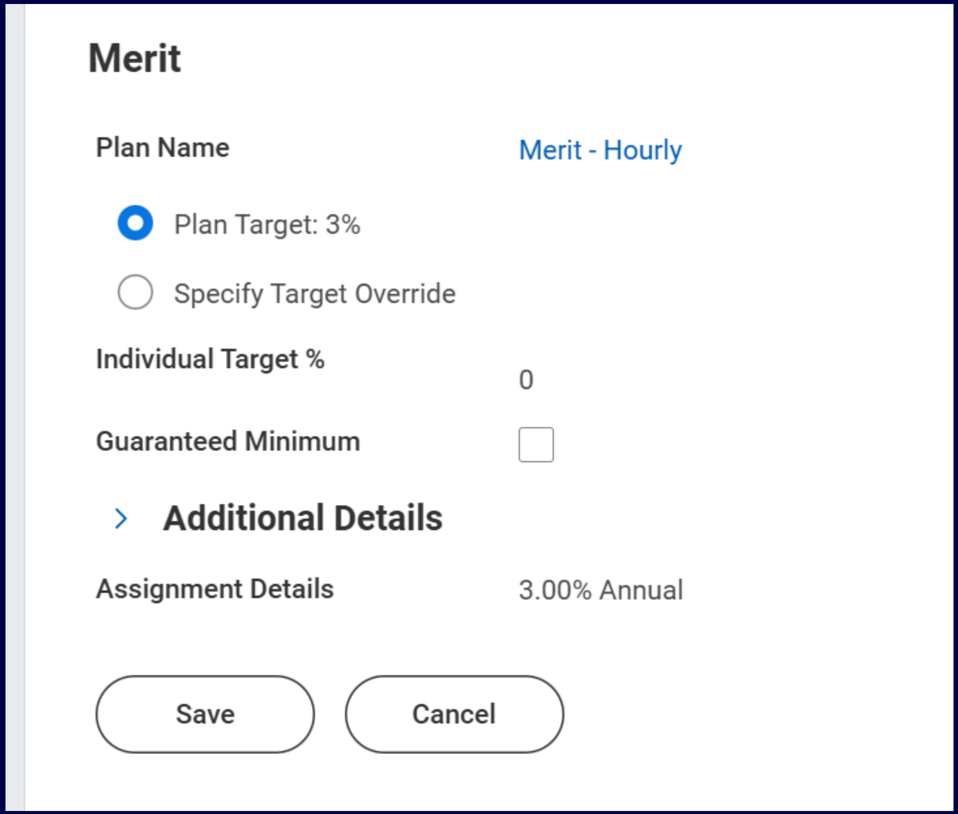
Individual Target Improved User Interface for Funded Plans

Impact analysis

Before the release



After the release



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U.S. Federal Pay and/or Grade Retention

What's changing

With this release, Workday enables U.S federal government users to retain a worker's previous pay and/or grade when they must move to a position of lower responsibility. override for bonus, merit, and stock plans.

Additional considerations

UI Changes : Workday update the Maintain Federal Field Values task with these new fields:

Grade Retention PRDs

Pay Retention PRDs

PRDs are Pay Rate Determinant codes. These codes designate any special factors that help determine an employee's rate of pay in the U.S. federal government, including an employee's entitlement for pay and/or grade retention. In Workday, PRDs are configured as Job Classifications. See the US Federal Government Compensation Community Guide in the Related Information section for more information.

What do I need to do

To enact an official grade or pay retention, you must also manually enter a personnel action. To do this in Workday, configure the Personnel Action Request business process as a subprocess of the Change Job business process. See the US Federal Government Business Processes community guide in the Related Information section for more information.

(Optional) Remove pay and/or grade retention by running the Change Job process again and removing any pay and/or grade retention PRDs from the Additional Job Classifications section.

What happens if I do nothing

Nothing. Workday continues to work as in previous updates.

https://doc.workday.com/release-notes/en-us/hrcomp/6922043.html

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U.S. Federal Pay and/or Grade Retention, cont.

Additional considerations

Workday update the Change Job business process to enable pay and/or grade retention. When you enter a valid PRD in the Additional Job Classifications field on the Details tab, workday enable these new fields in the Guidelines tasklet on the Compensation tab:

- Retained Compensation Package
- Retained Grade
- Retained Grade Profile
- Retained Step
- Retention Period End Date

When you select a PRD, you can also modify the worker's salary in the Compensation section to ensure they receive the correct amount.

Workday update the Set Up Compensation Step Adjustment and Schedule Automatic Step Progression tasks to exclude workers that are tied to a valid pay and/or grade retention pay rate determinant code. Workers who are on pay and/or grade retention are excluded from step progression, automatic step progression, step adjustments, and within grade increase notifications.

https://doc.workday.com/release-notes/en-us/hrcomp/6922043.html

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U.S. Federal Pay and/or Grade Retention, cont.

Additional considerations

Workday update the worker profile's Compensation page and the View Compensation task with pay and/or grade retention details. In addition, workday update the Compensation Events grid with pay and/or grade retention details in the existing Current and Proposed columns within the Compensation Changes sub-grid.

When you complete a Personnel Action Request to generate a copy of SF-50, Workday now populates the TO and FROM compensation fields with the appropriate retained data when the worker is on grade retention.

Workday add these compensation template fields in the Maintain Compensation Change Templates task under the Template Content->Guidelines Fields to Display section:

Guidelines - Retained Compensation Package

Guidelines - Retained Grade

Guidelines - Retained Grade Profile

Guidelines - Retained Step

https://doc.workday.com/release-notes/en-us/hrcomp/6922043.html

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U.S. Federal Pay and/or Grade Retention, cont.

Additional considerations

Guidelines - Retention Period End Date

Reporting
Workday deliver these new report fields with which you can create custom pay and/or grade retention reports:
On the Position business object:

Retained Compensation Grade (secured to the Worker Data: Compensation Grade domain)
Retained Compensation Grade Profile (secured to the Worker Data: Compensation Grade domain)
Retained Compensation Package (secured to the Worker Data: Compensation by Organization domain)
Retained Compensation Step (secured to the Worker Data: Compensation Grade domain)
Retained Step Start Date (secured to the Worker Data: Compensation Grade domain)
Retention Period End Date (secured to the Worker Data: Compensation Grade domain)

https://doc.workday.com/release-notes/en-us/hrcomp/6922043.html

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U.S. Federal Pay and/or Grade Retention, cont.

Additional considerations

On the Worker business object:

Retained Compensation Grade (secured to the Worker Data: Compensation Grade domain)

Retained Compensation Grade Profile (secured to the Worker Data: Compensation Grade domain)

Retained Compensation Package (secured to the Worker Data: Compensation by Organization domain)

Retained Compensation Step (secured to the Worker Data: Compensation Grade domain)

Retained Step Start Date (secured to the Worker Data: Compensation Grade domain)

Retention Period End Date (secured to the Worker Data: Compensation Grade domain)

Workday update these report fields to return empty if pay and/or grade retention is in place:

https://doc.workday.com/release-notes/en-us/hrcomp/6922043.html

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U.S. Federal Pay and/or Grade Retention, cont.

Additional considerations

On the Worker business object:
Compensation Step Eligible for Next Step
Compensation Step - Next
Next Step Start Date
On the Position business object:
Compensation Step Eligible for Next Step
Compensation Step - Next
Compensation Step - Next Start Date
On the Employee Compensation Event business object:
Compensation Step - Next Start Date
Web Services
Workday update these web services in v.44.0 to support pay and/or grade retention:
Change Job
Request Compensation Change
Import Request Compensation Change
See the SOAP API Change Log link under Related Information

https://doc.workday.com/release-notes/en-us/hrcomp/6922043.html

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Setup required

U.S. Federal Pay and/or Grade Retention

Impact analysis

Before the release	After the release
N/A	UI Changes Workday update the **Maintain Federal Field Values** task with these new fields: - Grade Retention PRDs - Pay Retention PRDs Workday update the *Change Job* business process to enable pay and/or grade retention. When you enter a valid PRD in the **Additional Job Classifications** field on the **Details** tab, Workday enable these new fields in the **Guidelines** tasklet on the **Compensation** tab: - Retained Compensation Package - Retained Grade - Retained Grade Profile - Retained Step - Retention Period End Date

Impact description

Improves the learner experience of your global workforce by ensuring that the recommended content aligns with the languages they understand best

This feature eliminates the need to create multiple job profiles to retain a worker's previous grade and/or pay details, providing a more simplified, streamlined experience. This feature also enables you to document the pay and/or grade retention of a worker with a Personnel Action Request on SF-50. If didn’t set up, Workday continues to work as in previous updates.

https://doc.workday.com/release-notes/en-us/hrcomp/6922043.html

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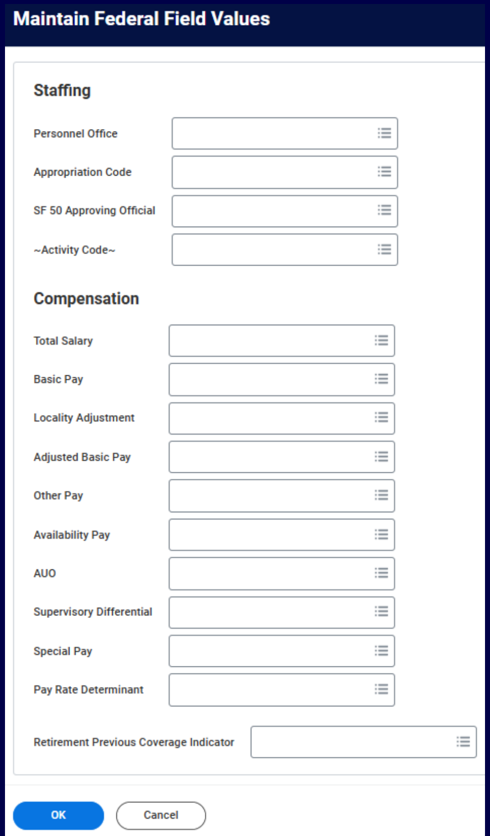
Setup required

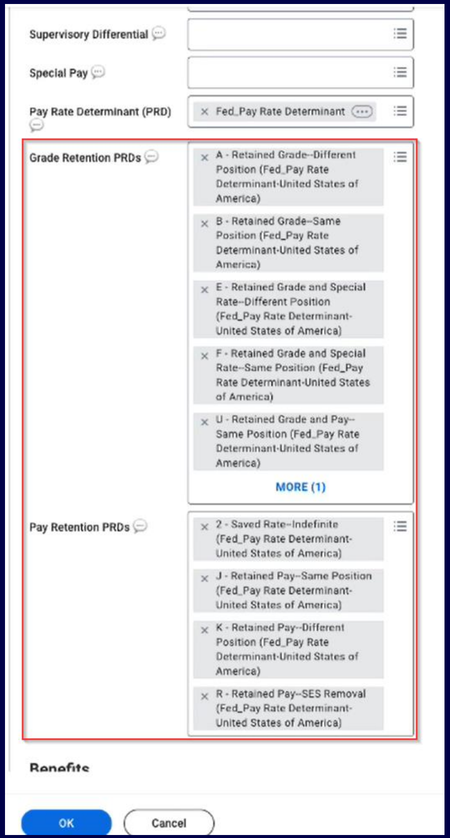
U.S. Federal Pay and/or Grade Retention

Impact analysis

Before the release



After the release



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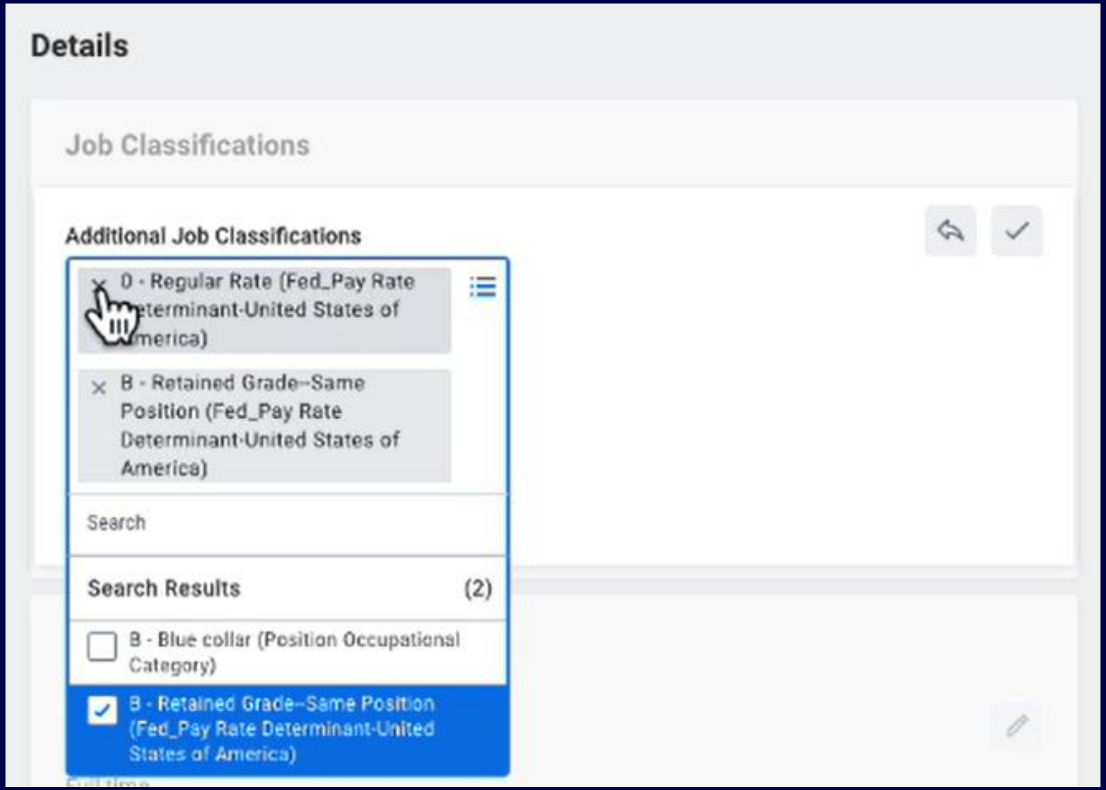
U.S. Federal Pay and/or Grade Retention

Impact analysis

Before the release

N/A

After the release



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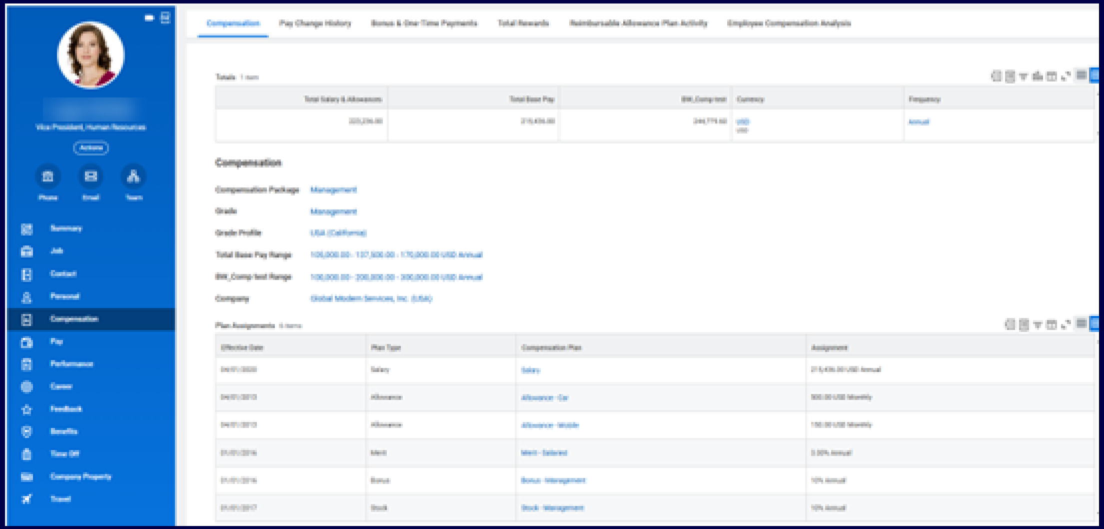
Setup required

U.S. Federal Pay and/or Grade Retention

Impact analysis

Before the release



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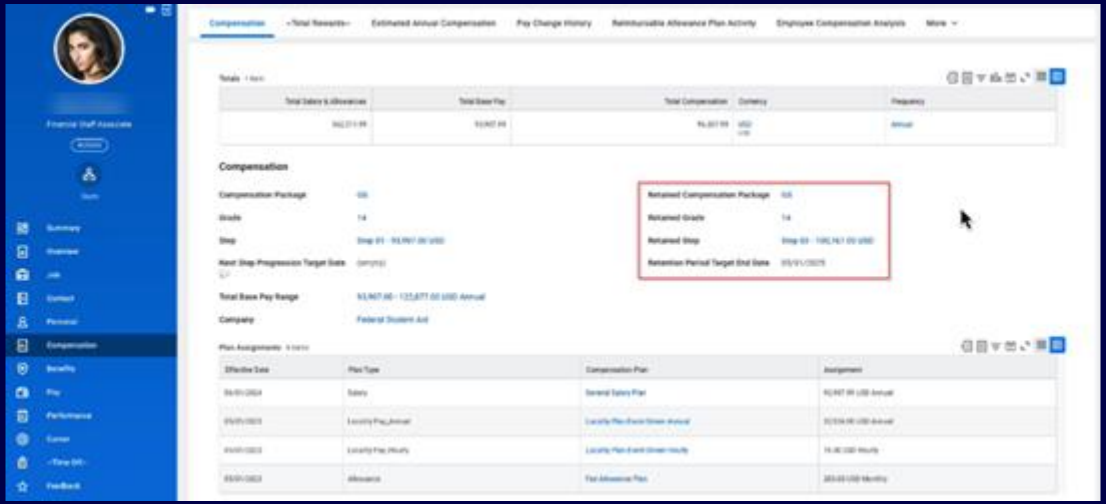

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Propose Compensation Hire as Substep of Hire with Enhanced User Interface

What's changing

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

Additional considerations

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

What do I need to do

- Access the View Business Process Type for Hire.
- Select Business Process > Configure Consolidated Template.
- Add Propose Compensation Hire as a Business Process Type.
- Add Propose Compensation Hire as a step in the Hire business process.

What happens if I do nothing

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

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

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Propose Compensation Hire as Substep of Hire with Enhanced User Interface

Impact analysis

Before the release	After the release
N/A	Workday enable the *Propose Compensation Hire* business process for use as a step within the *Hire* business process. With the enhanced user interface for *Hire* delivered in 2024R2, you can now propose compensation when hiring a new employee.

Impact description
Improves the learner experience of your global workforce by ensuring that the recommended content aligns with the languages they understand best. If didn’t set up, you can't include *Propose Compensation Hire* within the enhanced *Hire* interface.

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

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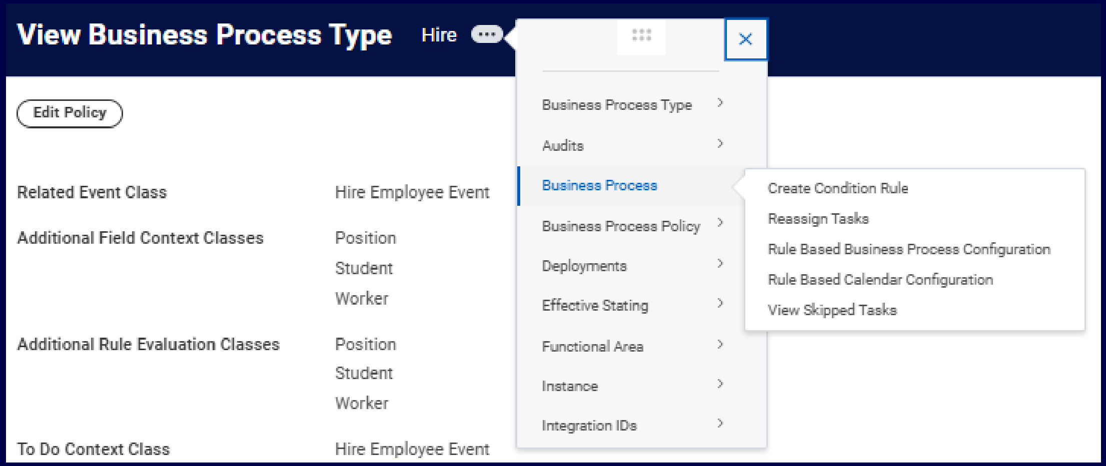
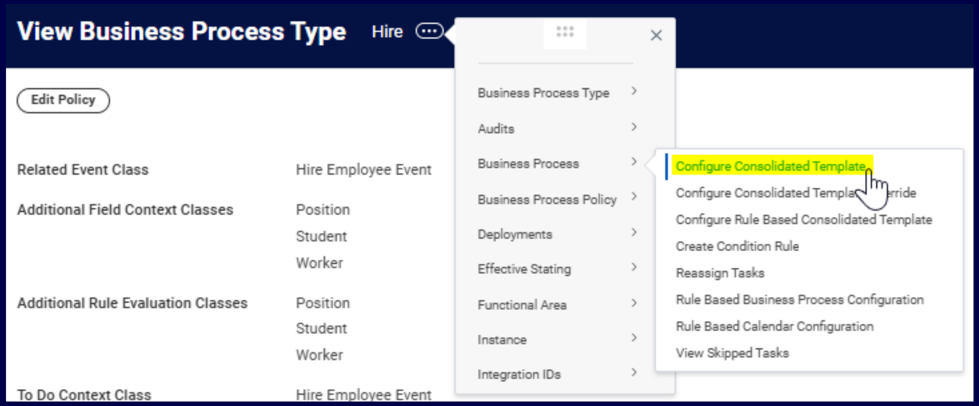
Propose Compensation Hire as Substep of Hire with Enhanced User Interface

Impact analysis

Before the release



After the release



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Setup required

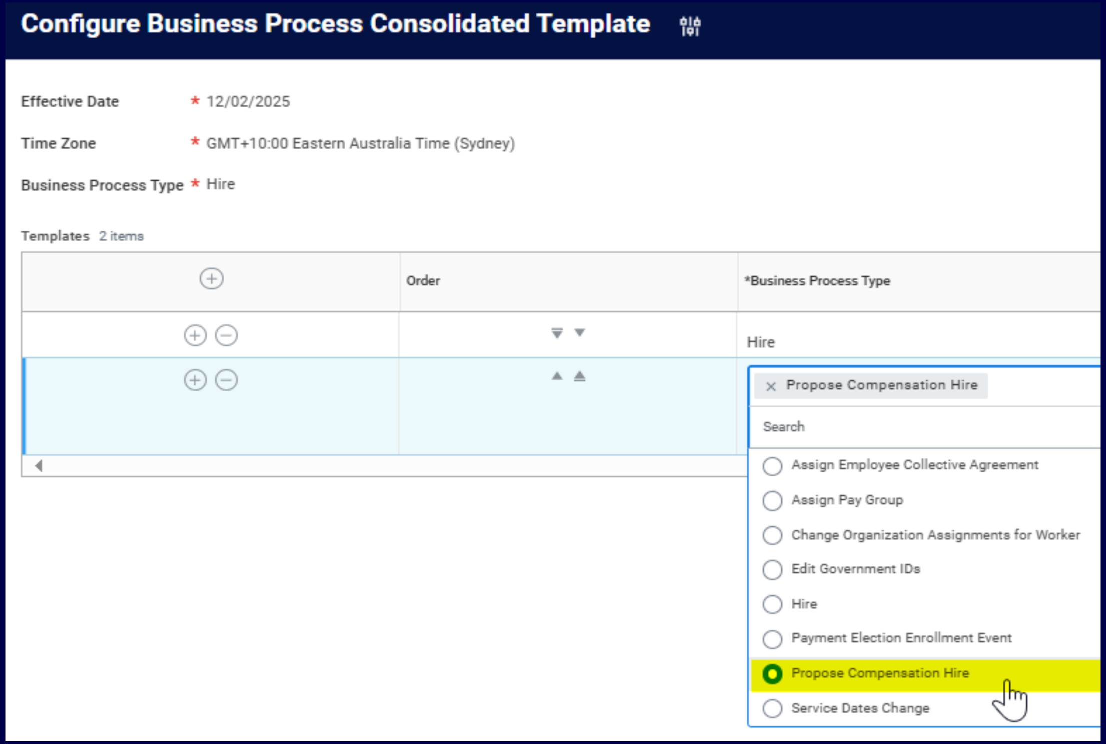
Propose Compensation Hire as Substep of Hire with Enhanced User Interface

Impact analysis

Before the release

N/A

After the release



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Minimum Wage in Compensation

What's changing

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

What do I need to do

To uptake the new functionality:

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

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

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Minimum Wage in Compensation, cont.

Additional considerations

Workday renames the Minimum Wage check box to Enforce Minimum Wage on the Create and Edit Hourly Plans tasks and the Set Up Hourly Plan Adjustment task to better describe its functionality. Enforce Minimum Wage on hourly plans uses Workday Payroll Authority Minimum Wage rates, a flat rate, or calculations to help you become compliant with minimum wage requirements. Workday also adds the Minimum Wage display field on the hourly tasklet, providing guidance when making a new pay recommendation. Workday displays the worker's minimum wage based on the hourly plan configuration.

What happens if I do nothing

Workday works as in previous updates.

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

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Minimum Wage in Compensation, cont.

Additional considerations

When the Enforce Minimum Wage checkbox is selected, you must enter an amount that's equal to or greater than the new pay recommendation in the Minimum Wage display field. Workday also delivers the new:

• Set Up: Payroll Authority Minimum Wages View security domain in the Compensation functional area.

• Hourly Plan Assignment Updates for Worker by Position mass operation type on the Mass Operation Management task, enabling you to update existing plan assignments. You can also enter an Adjust By Custom Amount to update a worker's hourly rate without changing the assignment or the hourly plan default. Example: Enter 5 for Adjust By Custom Amount to update Terry's hourly rate from 10.00 to 15.00.

• Minimum Wage Audit for Worker Assignments standard report (secured to the Worker Data: Staffing Reports main) to identify workers paid below the minimum wage amount set on the plan. Note:

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

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Minimum Wage in Compensation, cont.

Additional considerations

You can optionally configure compensation review validations on the New Base Pay Amount field using the new Minimum Wage Amount report field. Reporting: Workday delivers the new Minimum Wage Audit for Worker Assignments report on the Worker business object (secured to the Worker Data: Compensation by Organization domain). Workday also delivers these new report fields:

- Minimum Wage Amount report field on the Compensation Plan Assignment business object (secured to the Public Reporting Items domain).
- These report fields on the Compensation Assignment Proposal business object (secured to the Public Reporting Items domain):
- Minimum Wage Amount - Current
- Minimum Wage - Proposed

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

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Minimum Wage in Compensation, cont.

Additional considerations

• These report fields on the Compensation Plan Reporting Interface business object (secured to the Set Up: Base and Plan domain):
• Enforce Minimum Wage
• Minimum Wage
• Minimum Wage Amount Calculation
• Minimum Wage Type

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

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Minimum Wage in Compensation

Impact analysis

Before the release	After the release
N/A	Enforce minimum wage Check box is available in the Create Hourly Plan and Set up Hourly Plan Adjustment

Impact description
Improves the learner experience of your global workforce by ensuring that the recommended content aligns with the languages they understand best

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

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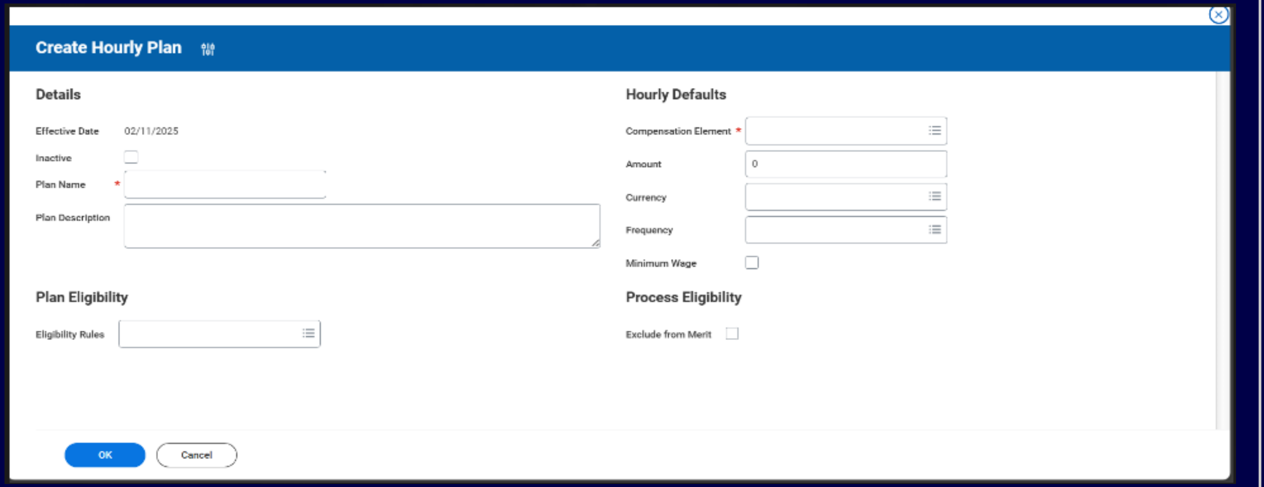
Setup required

Minimum Wage in Compensation

Impact analysis

Before the release



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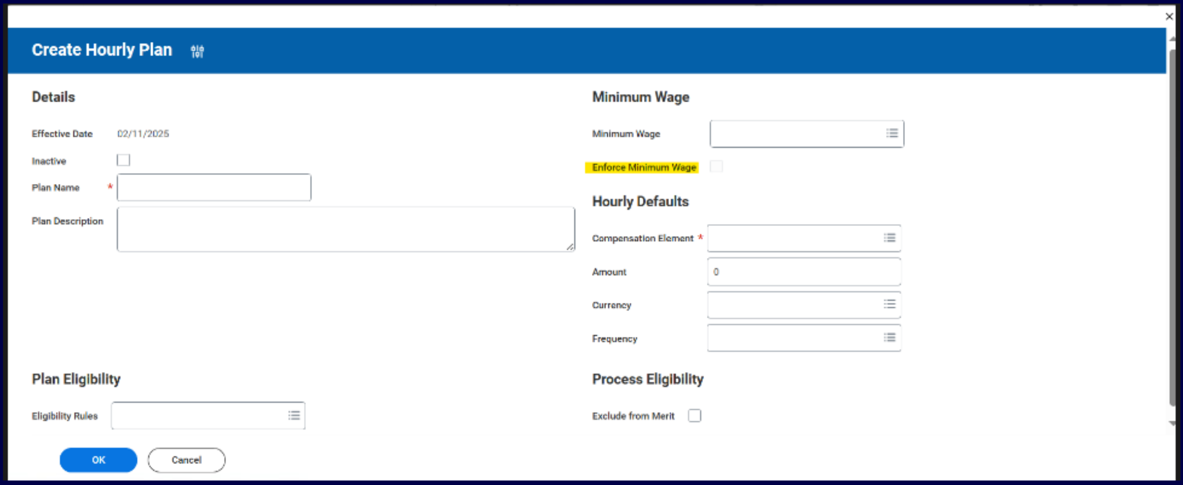

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Machine Learning Compensation Plan Recommendations for Hire

What's changing

- Workday expands the use of machine learning to recommend compensation plans first delivered in 2024R2.
- Workday extends this machine learning functionality to the Compensation Plan prompt during the Hire business process.

Additional considerations

If you opt in, Workday recommends up to 5 compensation plans whenever you assign a new compensation plan to a worker during the Propose Compensation Hire business process.

What do I need to do

To opt in to this feature, you must:

- Access the Innovation Services and Data Selection Opt-In task.
- Navigate to Cross Application Services category under the Available Services tab.
- Select the Opt In check box for the Intelligent Core Generally Available Features service.
- On the next page, select the Opt In check box for these data categories: Custom Organization Data, Staffing Event Data, Supervisory Organization Data, Worker Profile Data.

After you opt in, it takes approximately 2 weeks for Workday to process your data and present recommendations.

https://doc.workday.com/release-notes/en-us/hrcomp/8477429.html

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Machine Learning Compensation Plan Recommendations for Hire, cont.

Additional considerations

Example: When you add an allowance plan, Workday might suggest:

- Car Allowance
- Housing Allowance
- Meal Allowance

Workday uses machine learning to recommend compensation plans most relevant to:

- The user making the change, depending on how frequently and recently they assign plans.
- The worker receiving the assignment, such as eligibility, job profile, or location.

Workday only displays plans that:

What happens if I do nothing

Nothing. Workday won't display recommendations based on machine learning.

https://doc.workday.com/release-notes/en-us/hrcomp/8477429.html

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Machine Learning Compensation Plan Recommendations for Hire, cont.

Additional considerations

• The worker is eligible for, unless you have the ability to assign any plan regardless of the worker's eligibility.

- Are active.
- The user has security permissions to add. Example: If segmented Security is set up to hide specific plans from the user, then those plans won't display as recommendations.

https://doc.workday.com/release-notes/en-us/hrcomp/8477429.html

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Machine Learning Compensation Plan Recommendations for Hire

Impact analysis

Before the release	After the release
Workday must manually select the eligible Compensation Plan during the propose compensation event.	Workday recommends up to 5 compensation plans whenever you assign a new compensation plan to a worker during the Propose Compensation Hire business process.

Impact description
Improves the learner experience of your global workforce by ensuring that the recommended content aligns with the languages they understand best.

https://doc.workday.com/release-notes/en-us/hrcomp/8477429.html

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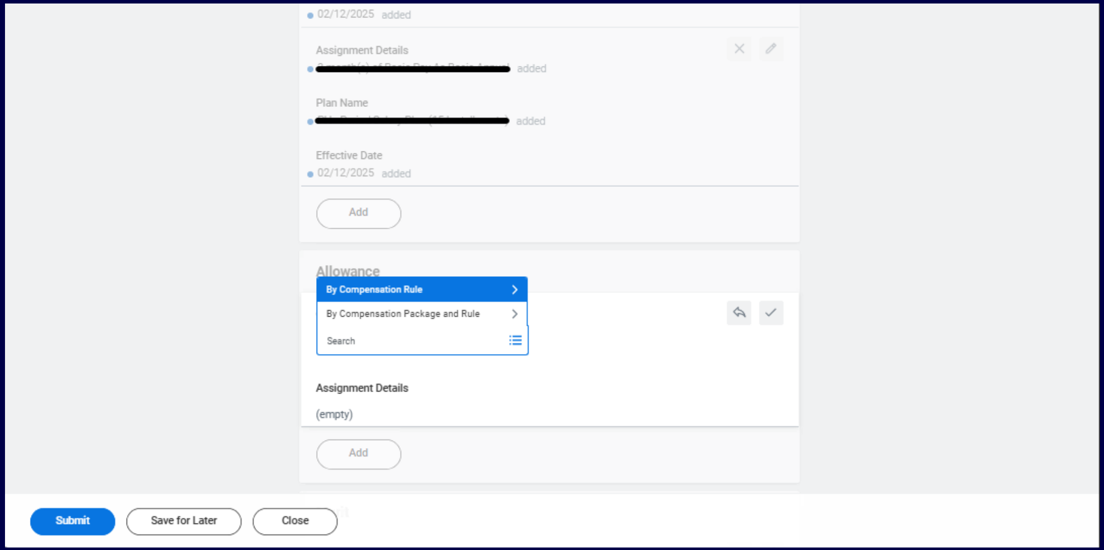
Setup required

Machine Learning Compensation Plan Recommendations for Hire

Impact analysis

Before the release



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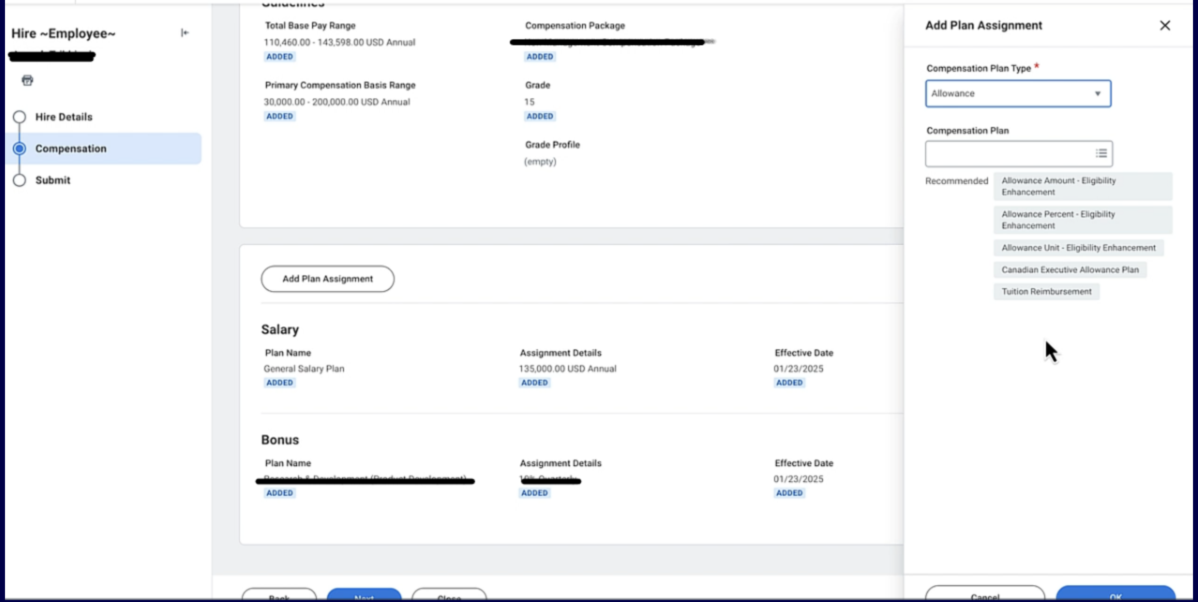

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Core Human Capital Management

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Edit To Do Task

What's changing

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

Additional considerations

Workday delivers a new Edit To Do task secured to these domains:

- *Business Process Administration.*
- *Manage: Business Process Definitions.*

You can use the Edit To Do task to edit these To Do details either directly or as a related action for a To Do item.

- Inactive/Active.
- Instructional Text.
- Show Report Document.
- Task.
- To Do Description.

What do I need to do

Nothing. This feature is automatically available.

What happens if I do nothing

This feature is automatically available. You won't experience any change except for the ability to search for the standalone Edit To Do task or view the related action to edit To Dos.

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

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Edit To Do Task

Impact analysis

Before the release	After the release
Workday doesn’t allow stand-alone task or related actions to edit To Dos.	Workday now enables you to use a standalone task or related action to edit To Dos.

Impact description
This feature provides an improved user experience and faster workflows by enabling you to directly edit To Dos with a standalone task or related actions.

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

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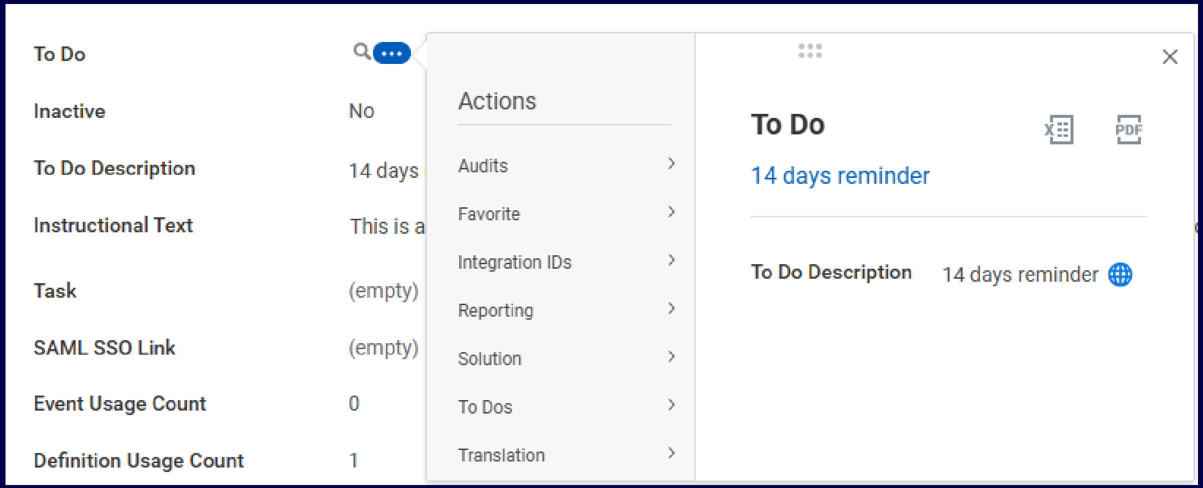
Automatically available

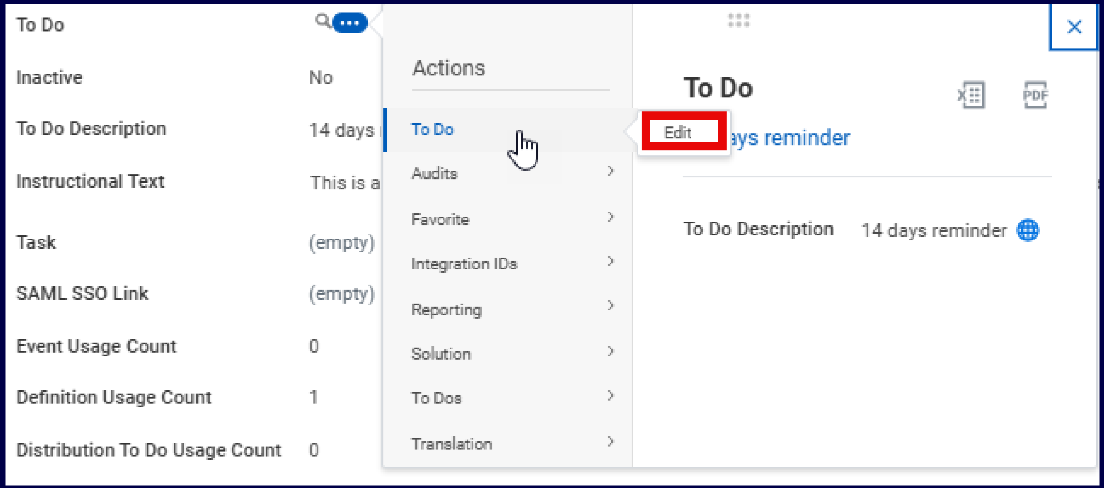
Edit To Do Task

Impact analysis

Before the release



After the release



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Automatic Advance of Business Processes when Integrations Fail

What's changing

With this release, Workday now enables you to automate whether your business processes can advance, even if associated integrations fail.

What do I need to do

Nothing. This feature is automatically available.

Additional considerations

Workday delivers a new Advance Automatically check box to the Maintain Redirect related action for integration steps on business processes. When you select the Advance Automatically checkbox, Workday disables manual redirect actions and automatically advances your business processes to the next step if an integration fails.

What happens if I do nothing

This feature is automatically available. You won't experience any change except for the ability to select the Advance Automatically checkbox in the Maintain Redirect related actions for integration steps on business processes.

https://doc.workday.com/release-notes/en-us/efcore/8244322.html

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Automatic Advance of Business Processes when Integrations Fail

Impact analysis

Before the release	After the release
If a Custom Integration in the Business Process fails, the business process step does not advance to the next step, manual intervention is required to proceed.	Workday now allows custom integrations in the Business Processes to advance automatically to the next step even if integration fails

Impact description
Workday improves user experience and efficiency by eliminating the need to manually intervene when business processes stall after custom integrations fail.

https://doc.workday.com/release-notes/en-us/efcore/8244322.html

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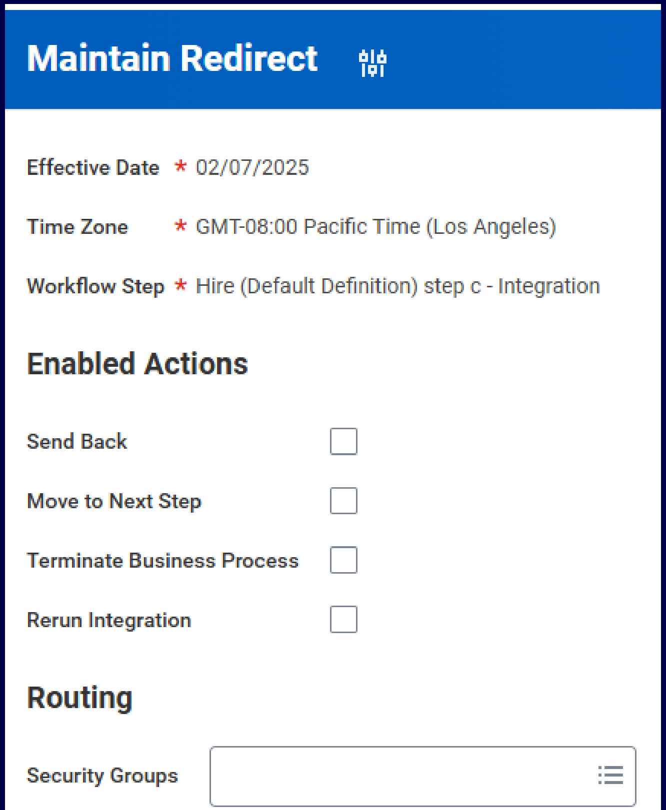
Automatically available

Automatic Advance of Business Processes when Integrations Fail

Impact analysis

Before the release



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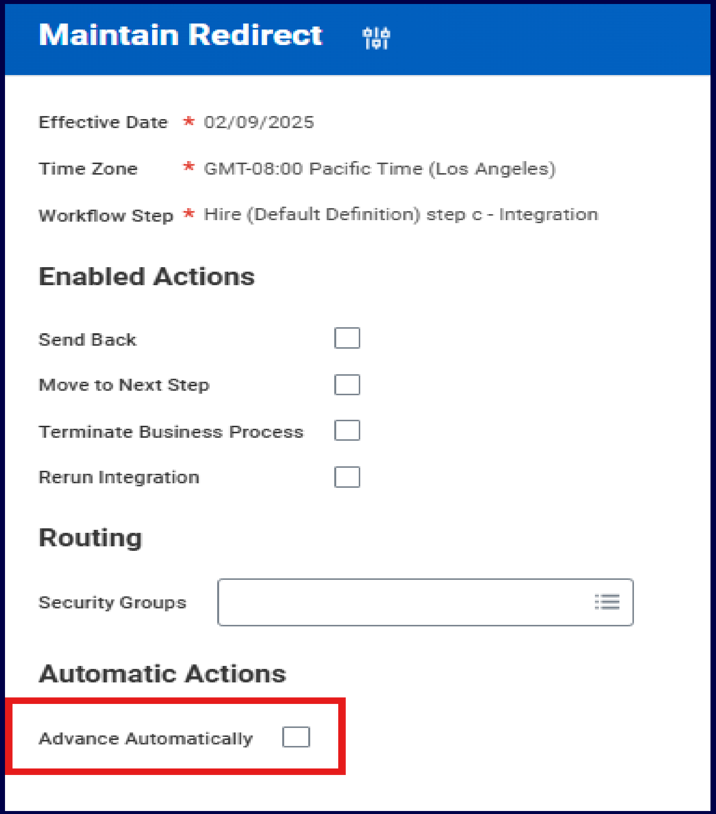

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Routing Modifier Support on the Request Business Process

What's changing

With this release, Workday adds support for the Primary Position and Additional Positions routing modifiers on the Request business process.

What do I need to do

N/A

Additional considerations

Workday delivers a new Routing Modifier prompt that enables users to select routing modifiers for steps when configuring a Request business process definition.

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/efcore/8244335.html

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Automatically available

Routing Modifier Support on the Request Business Process

Impact analysis

Before the release	After the release
The Request business process didn’t support routing modifiers.	With this release, Workday adds support for the routing modifiers on the Request business process.

Impact description
• Previously, the Request business process didn’t support routing modifiers. • Example: For workers with multiple positions, Request business process Approval steps were routed to both a worker's primary position manager and their additional position manager. • With this update, the Request business process is now routed to the most relevant users based on the configuration of the Additional Positions and Primary Position routing modifiers.

https://doc.workday.com/release-notes/en-us/efcore/8244335.html

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Automatically available

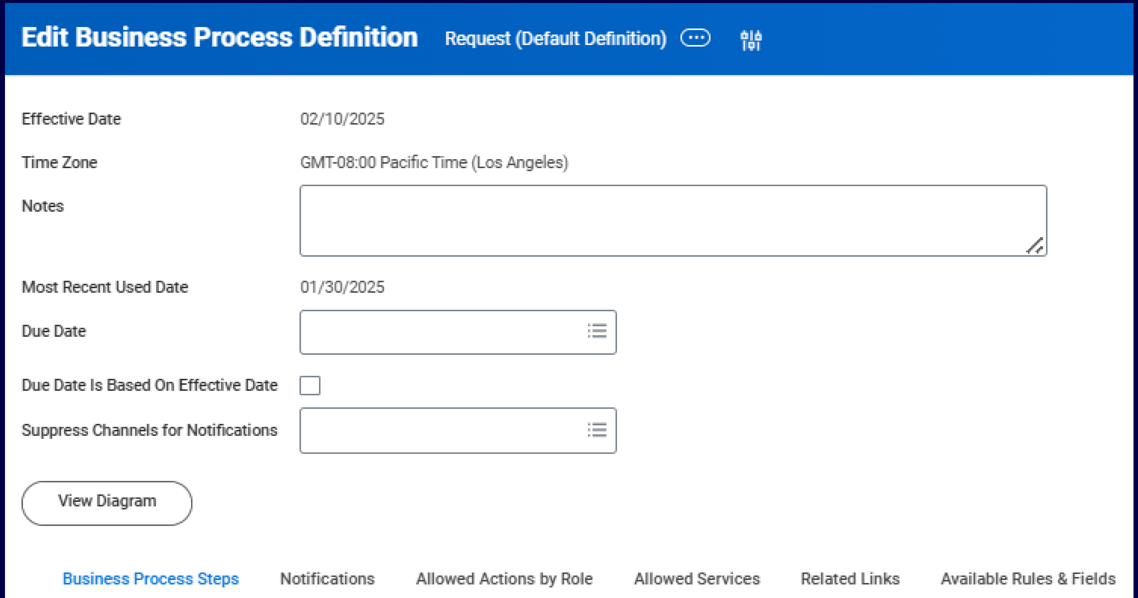
Routing Modifier Support on the Request Business Process

Impact analysis

Before the release

N/A

After the release



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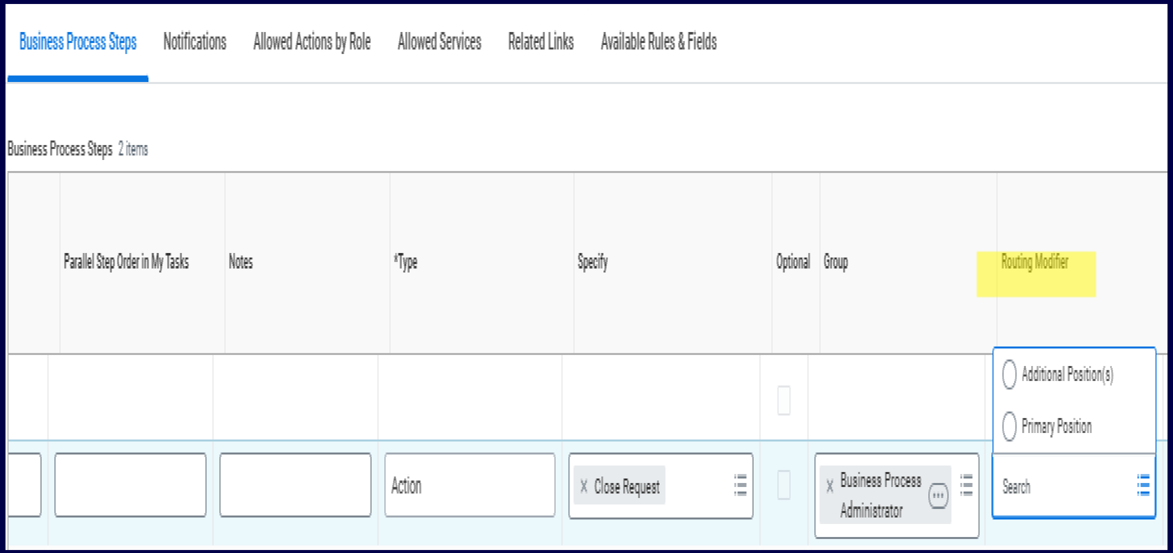
Routing Modifier Support on the Request Business Process, cont.

Impact analysis

Before the release

N/A

After the release



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U.S. Federal Enhancements - Personnel Action Request.

What's changing

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

Additional considerations

New Fields

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

What do I need to do

These changes are automatically available for US Federal customers only.

What happens if I do nothing

These changes will still apply since they are automatically available.

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

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

Additional Considerations

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

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

Cancel PAR

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

PAR Set Up

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

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

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U.S. Federal Enhancements - Personnel Action Request

Impact analysis

Before the release	After the release
Transfer In Agency Code and Transfer Out Agency Code fields are not available in PAR	Workday adds two new fields: Transfer In Agency Code and Transfer Out Agency Code to PAR under the Agency Data Element

Impact description
The addition of Transfer In Agency Code and Transfer Out Agency Code to PAR allows you to keep track of personnel transferring to and from another agency. This record keeping is necessary for an accurate documentation of a personnel action for your employees. Allowing the flexibility to generate a Cancel PAR when needed gives you more control over when a Cancel PAR occurs and the option to cancel a Cancel PAR business process, if necessary.

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

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U.S. Federal Enhancements - Personnel Action Request

Impact analysis

Before the release

N/A

After the release

2 items

Report Fields	Related Business Object	Description	F
Transfer Out Agency Code (Report Field)		The transfer out agency code entered on the Personnel Action Request.	T
Transfer In Agency Code (Report Field)		The transfer in agency code entered on the Personnel Action Request.	T

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Latest Event Record Moment for Reassigned Business Process Tasks

What’s changing?

With this release, Workday provides a more accurate date and time when a business process task is successfully reassigned to another person to act on.

Additional considerations

- When you reassign a business process step, workday now display the latest date and time when the reassignment successfully completes. Workday display the latest timestamp for the reassigned event record associated with the My Tasks item:
- In the Event Record Moment column on the All Actions tab of the Full Process Record.

What do I need to do?

N/A

What happens if I do nothing?

N/A

https://doc.workday.com/release-notes/en-us/efcore/7944614.html

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Latest Event Record Moment for Reassigned Business Process Tasks, cont.

Additional considerations

- When you use the Last Updated Moment report field to report on the last moment a step was updated. Workday now returns the same date and time as the Event Record Moment on the Full Process Record.
- When you reassign an unassigned task and the business process administrator approves the reassignment, workday update the Event Record Moment to reflect when the awaiting person is assigned to take action on the task.
- Workday doesn’t update the Event Record Moment if the reassignment is:
  - Canceled.
  - Denied.
  - Pending.

https://doc.workday.com/release-notes/en-us/efcore/7944614.html

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Automatically available

Latest Event Record Moment for Reassigned Business Process Tasks

Impact analysis

Before the release	After the release
No provision to check accurate date and time when a business process task is reassigned to another person.	Workday now enables you to track the accurate date and time when a business process task is successfully reassigned to another person.

Impact description
This This feature provides a better user experience and more accurate event data by providing the latest date and time, so you know who is assigned to the task.

https://doc.workday.com/release-notes/en-us/efcore/7944614.html

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Automatically available

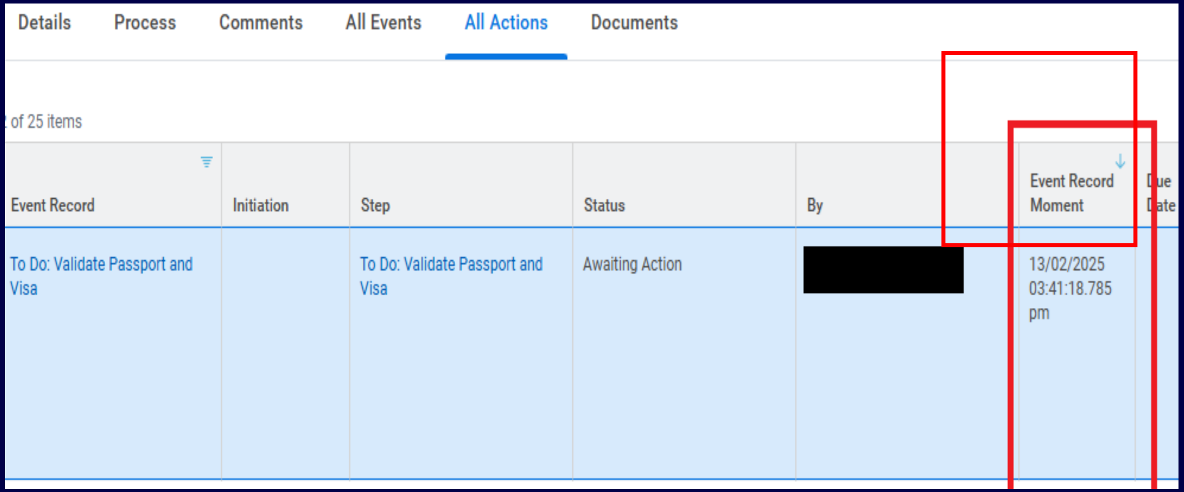
Latest Event Record Moment for Reassigned Business Process Tasks

Impact analysis

Before the release

N/A

After the release



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Latest Event Record Moment for Reassigned Business Process Tasks, cont.

Impact analysis

Before the release

N/A

After the release

Process History 38 items

Process	Step	Status	Completed On
Add Additional Job	To Do: Validate Passport and Visa	Reassigned	13/02/2025 03:41:18 pm

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Automatically available

Manager Insights Hub

What's changing

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

Additional considerations

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

What do I need to do

If you have already configured the Manager Insights Hub, there's nothing you need to do. Access to pages, sections, tasks, and reports depends on your organization's Workday product subscriptions. The individual security permissions of supervisory organization managers determines what data they can view, and which tasks, reports and cards they can use.

If you haven't configured the Manager Insights Hub, you must configure the Manage: Manager Insights Hub domain (secured to the Manager Insights Hub functional area). Consider the other domains that you want to enable as part of your Manager Insights Hub setup.

What happens if I do nothing

If you've already configured the Manager Insights Hub, users will continue to be able to access the hub.

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

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Manager Insights Hub, cont.

Additional considerations

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

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

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

What happens if I do nothing

Depending on their security permissions, they can view the new buttons and the new In-Progress Hire Events card.

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

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Automatically available

Manager Insights Hub

Impact analysis

Before the release	After the release
Workday doesn't have additional Cards and Tasks in the Manager Insight Hub UI	• Added In-Progress Hire Events card • Added Add Job & End Job Tasks in the Tasks & Reports Section • View Org Chart Button available in View my Team Tab

Impact description
This continues to consolidate critical hiring and staffing tasks into one central location, and enables managers to easily support their team.

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

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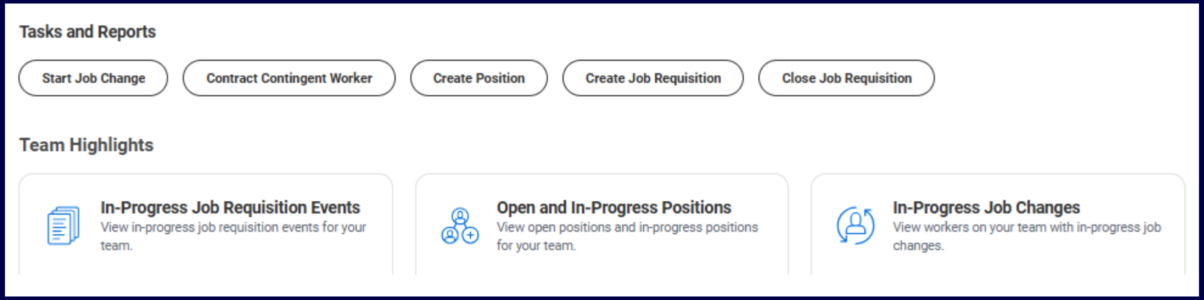
Automatically available

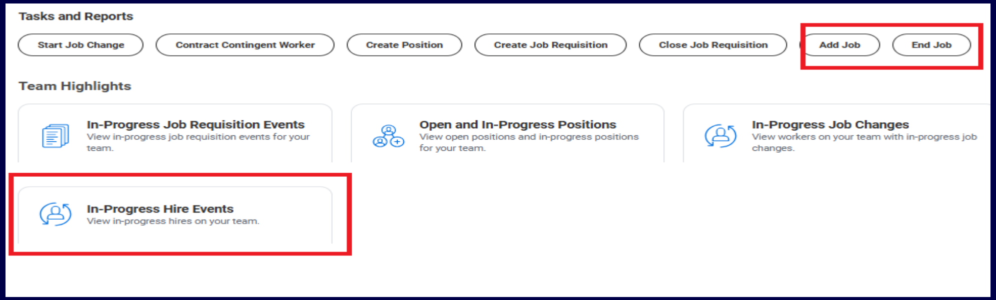
Manager Insights Hub

Impact analysis

Before the release



After the release



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Change Job New User Experience for Corrections

What's changing

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

Additional considerations

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

What do I need to do

The enhanced user experience is automatically available when you correct Change Job events for templates with the Enable Enhanced UI for this Template check box selected.

To enable the new Change Job Interface, select the Enable Enhanced UI for this Template check box for applicable Change Job templates.

What happens if I do nothing

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

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

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

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Automatically available

Change Job New User Experience for Corrections

Impact analysis

Before the release	After the release
The Change Job event correction has a different UI over the Change Job Templates if Enable Enhanced UI Template is checked	The enhanced user experience is automatically available when you correct Change Job events for templates with the Enable Enhanced UI for this Template check box selected.

Impact description
This supports a consistently streamlined experience by providing the simplified user interface throughout the Change Job business process.

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

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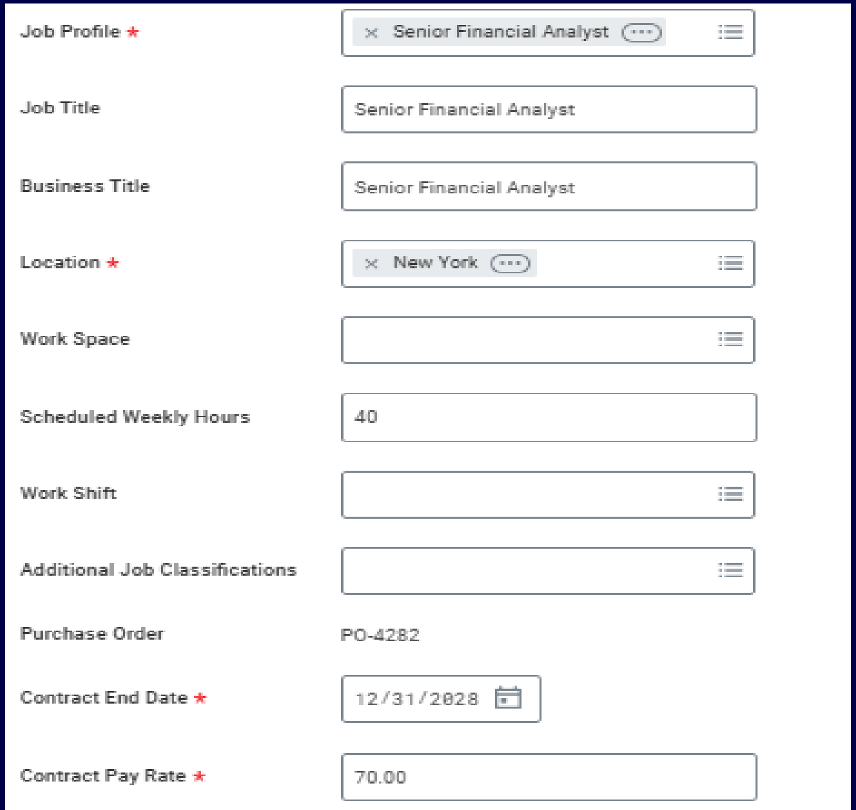
Automatically available

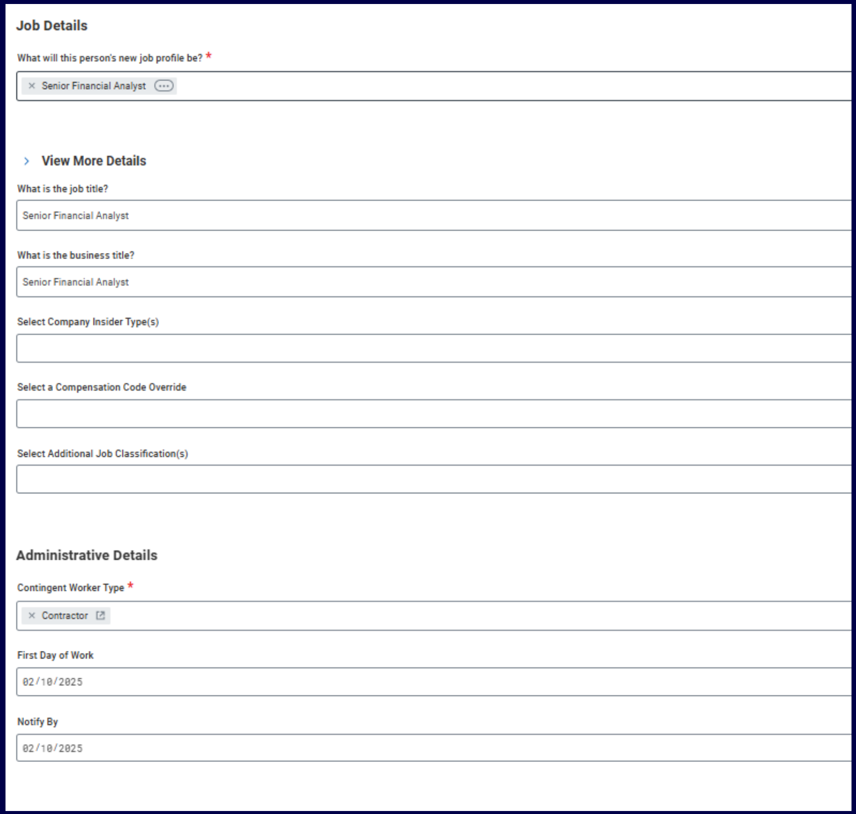
Change Job New User Experience for Corrections

Impact analysis

Before the release



After the release



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Custom Labels for Workday Fields

What's changing

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

Additional considerations

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

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

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

What do I need to do

N/A

What happens if I do nothing

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

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

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Automatically available

Custom Labels for Workday Fields

Impact analysis

Before the release	After the release
There was no option of renaming Workday fields, that was especially needed in case of government agencies.	This release will enable you to rename Workday fields to better meet customer requirements, particularly those of government agencies.

Impact description
Using custom labels in Workday for your terms makes it easier for you to align with your organization's terminology.

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

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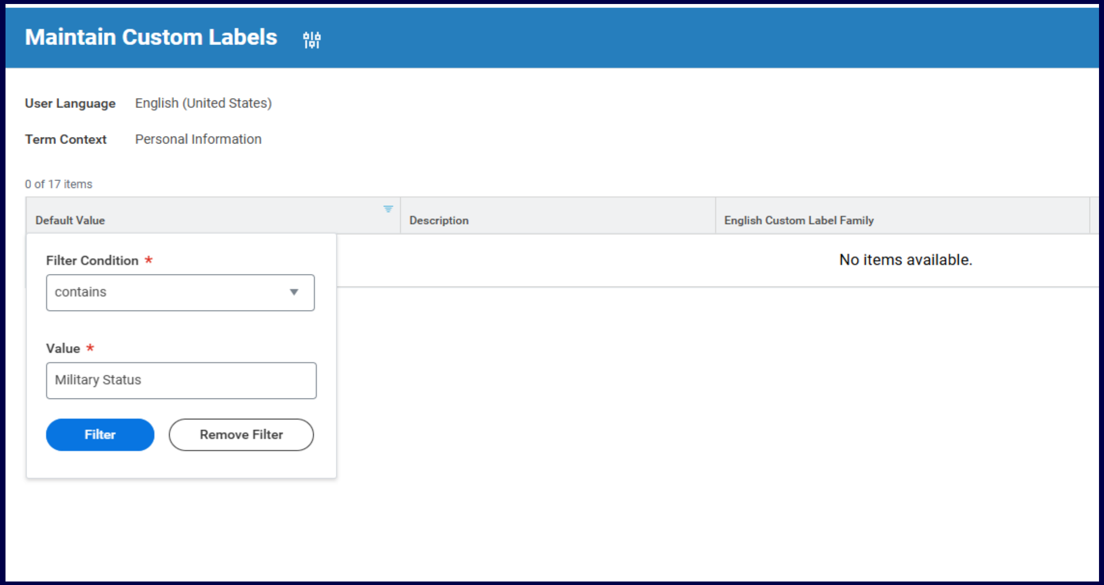
Custom Labels for Workday Fields

Impact analysis

Before the release



After the release

Workday updates the Preview and Production dates for this feature to:

- Preview: 2025-03-15
- Production: 2025-03-15

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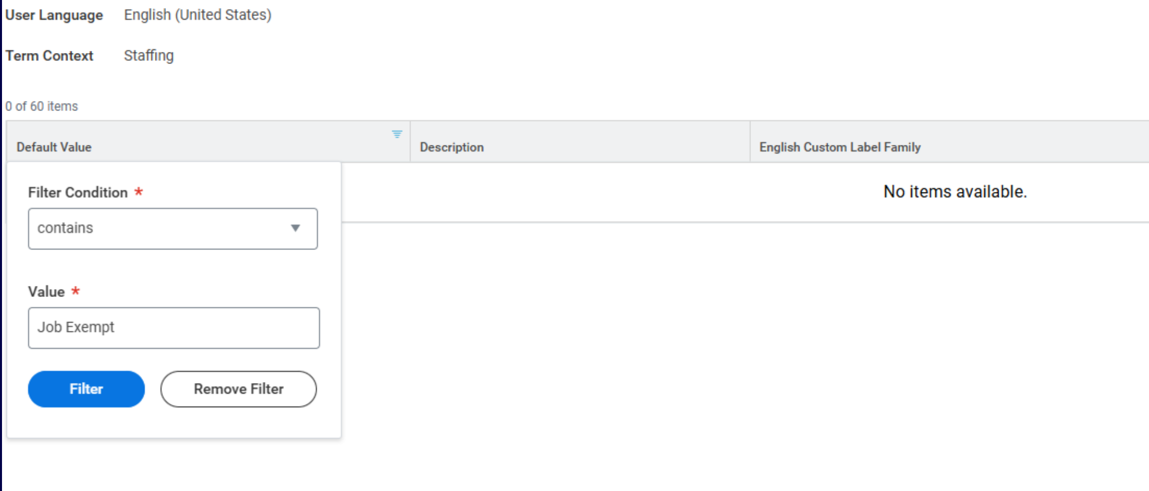
Custom Labels for Workday Fields, cont.

Impact analysis

Before the release



After the release

Workday updates the Preview and Production dates for this feature to:

- Preview: 2025-03-15
- Production: 2025-03-15

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Automatically available

Supervisory Organization Editable on the Change Job Business Process

What's changing

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

Additional considerations

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

- Review Change Job
- Review: Receiving ~Manager~

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

What do I need to do

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

What happens if I do nothing

N/A

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

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Supervisory Organization Editable on the Change Job Business Process

Impact analysis

Before the release	After the release
Supervisory Organization field is not able to be edited during review job change steps.	Workday updates Change Job business process so that you can now edit the Supervisory Organization field when reviewing job changes.

Impact description
This enables you to more easily and efficiently complete the administrative tasks that are required when transferring workers in your organization. It also enables the receiving manager to further define the target subordinate organization for a worker.

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

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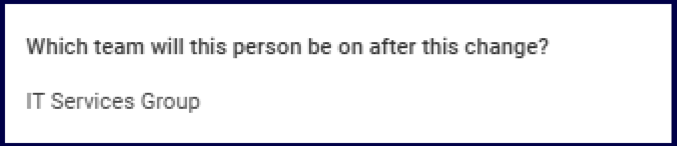
Supervisory Organization Editable on the Change Job Business Process

Impact analysis

Before the release



After the release

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Automatically available

Enhanced Offboarding Resignation User Experience

What's changing

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

Additional considerations

- Resignation Business Process
- Workday updates the user interface of these tasks on the Submit Resignation business process in order to deliver a guided experience as you complete the resignation process:
  - Approve Resignation
  - Correct Resignation
  - Rescind Resignation
  - Review Resignation

What do I need to do

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

What happens if I do nothing

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

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

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Enhanced Offboarding Resignation User Experience, cont.

Additional considerations

- Submit Resignation
- Withdraw Resignation
- Field Label Renames

- For clarity, Workday renames these field labels on resignation tasks:
  - Primary Reason to Reason for Resignation
  - Proposed Termination Date to When is your last available day of work?
  - Secondary Reason to Additional Reasons for Resignation
  - New Worker Information Side Panel
- Workday also delivers a new Worker Information side panel on resignation tasks, which displays to users as they review or approve a resignation.

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

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Enhanced Offboarding Resignation User Experience, cont.

Additional considerations

- Submit Resignation and Withdraw Resignation Tasks
- Workday enables the Submit Resignation and Withdraw Resignation tasks to be searchable through global Search.
- Workday enables Tenant Branding on this task.
    - Mobile
- Workday automatically enables these new user interfaces for Mobile.

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

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Enhanced Offboarding Resignation User Experience

Impact analysis

Before the release	After the release

• Field Labels: Primary Reason, Secondary Reason, Proposed Termination Date
• No Worker Information Side Panel.
• Submit Resignation and Withdraw Resignation not available in Global Search.
	Workday updates the following user experience for Resignation :
	
	• Field Label Renames for Resignation Tasks
	  ○ **Primary Reason** to **Reason for Resignation**
	  ○ **Proposed Termination Date** to W**hen is your last available day of work?**
	  ○ **Secondary Reason** to **Additional Reasons for Resignation**
	
	• New Worker Information Side Panel.
	• Submit Resignation and Withdraw Resignation Tasks now available in Global Search.

Impact description
The improved resignation experience increases efficiency by providing employees with field level guidance as they complete their resignation through self-service and without the need for additional support. This ensures more timely offboardings and prevents downstream issues relating to HR or Payroll.

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

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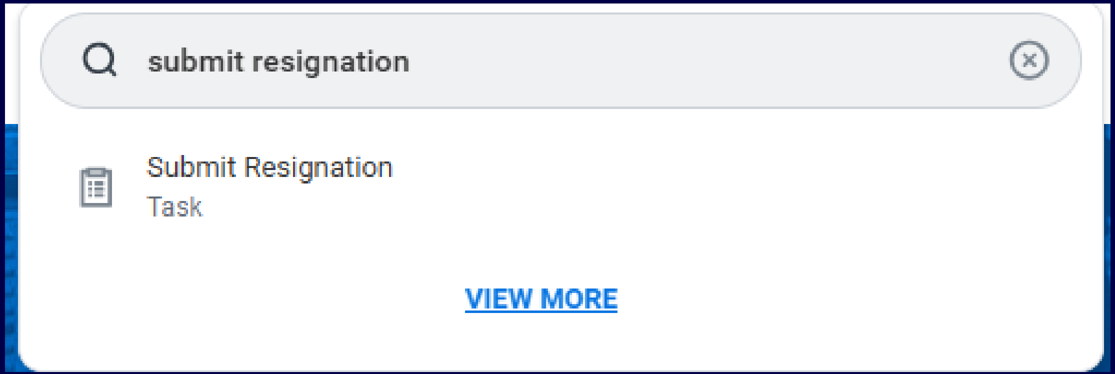
Enhanced Offboarding Resignation User Experience

Impact analysis

Before the release

After the release



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Enhanced Offboarding Resignation User Experience, cont.

Impact analysis

Before the release

Details to Review

Notification Date 02/07/2025

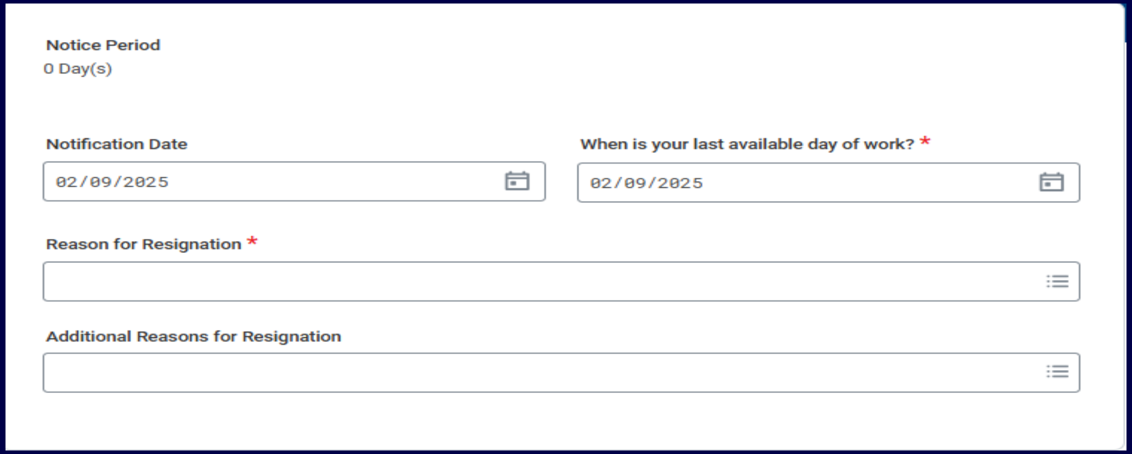
Notice Period 0 Day(s)

Proposed Termination Date * 02/07/2025

Primary Reason * Worker Resignation > Voluntary > Dissatisfied with Job

Secondary Reasons (empty)

After the release



Notice Period

0 Day(s)

Notification Date

02/09/2025

When is your last available day of work? *

02/09/2025

Reason for Resignation *

Additional Reasons for Resignation

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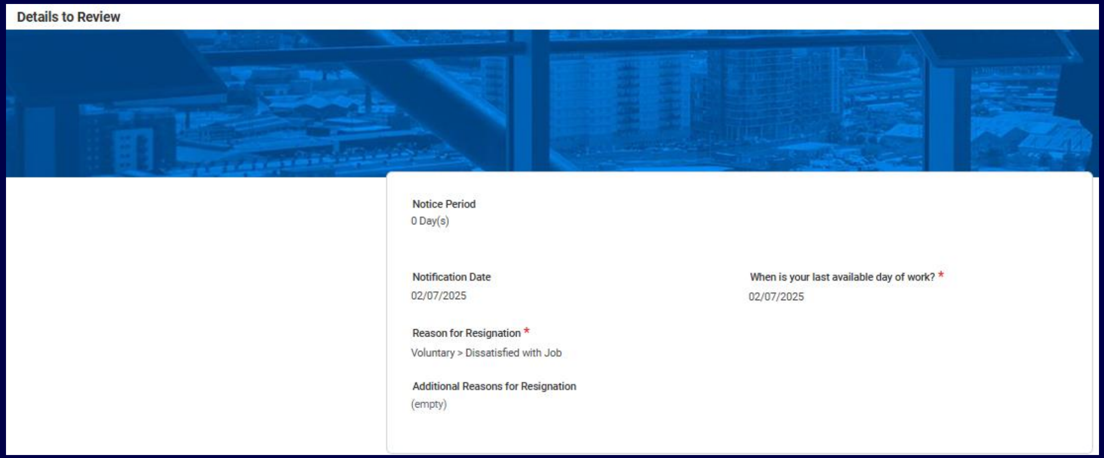
Enhanced Offboarding Resignation User Experience, cont.

Impact analysis

Before the release

N/A

After the release



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Effective Dating for Service Dates Web Service

What's changing?

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

Additional considerations

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

What do I need to do?

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

What happens if I do nothing?

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

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

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Automatically available

Effective Dating for Service Dates Web Service

Impact analysis

Before the release	After the release
No option to add effective dates to service date changes using the service dates web service.	Workday now enables you to add effective dates to service date changes using the service dates web service.

Impact description
This reduces downstream impacts to calculations and improves reporting.

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

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Automatically available

Effective Dating for Service Dates Web Service

Impact analysis

Before the release

N/A

After the release

Edit Service Dates - v44.0

Area	All			dit Service Dates Event Data (All)						
Restriction	Required	Required	Required	ptional	Optional	Optional	Optional	Optional	Optional	O
Format	Text	Employee_ID	YYYY-MM-DD	YYY-MM-DD	YYYY-MM-DD	YYYY-MM-DD	YYYY-MM-DD	YYYY-MM-DD	YYYY-MM-DD	Y
Fields	Spreadshe	Worker*	Effective Date*	riginal Hire Date	Continuous Service	Expected Retiremei	Retirement Eligibilit	End Employment Da	Seniority Date	S

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Custom Business Process Validations on Worksheets

What's changing?

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

Additional considerations

- Custom business process validations now trigger on these standalone worksheets when users select the Validate All button:
- Change Job.
- Change Organization Assignments.
- End Contract Contingent Worker.
- Termination.
- Note: This update doesn't include Org Studio worksheets.

What do I need to do?

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

What happens if I do nothing?

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

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

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Automatically available

Custom Business Process Validations on Worksheets

Impact analysis

Before the release	After the release
No option to validate on worksheets for custom business process validations.	Custom business process validations will now validate on worksheets, reducing manual effort and helping to ensure that data is correct.

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

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

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Automatically available

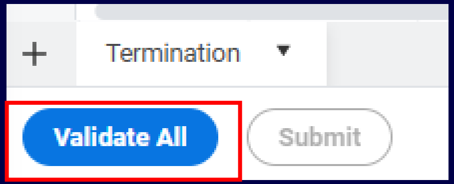
Custom Business Process Validations on Worksheets

Impact analysis

Before the release

N/A

After the release



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Change Job Templates New User Experience on Mobile

What's changing

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

Additional considerations

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

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

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

What do I need to do

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

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

What happens if I do nothing

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

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

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Change Job Templates New User Experience on Mobile

Impact analysis

Before the release	After the release
There was no option of leveraging the simplified version of user interface in mobile for change job templates with subprocesses.	This release will enable you to leverage the simplified user interface in mobile for change job templates with subprocesses. .

Impact description
This feature enables you to provide a consistent change job experience for users on mobile and desktop who are using change job templates with subprocesses.

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

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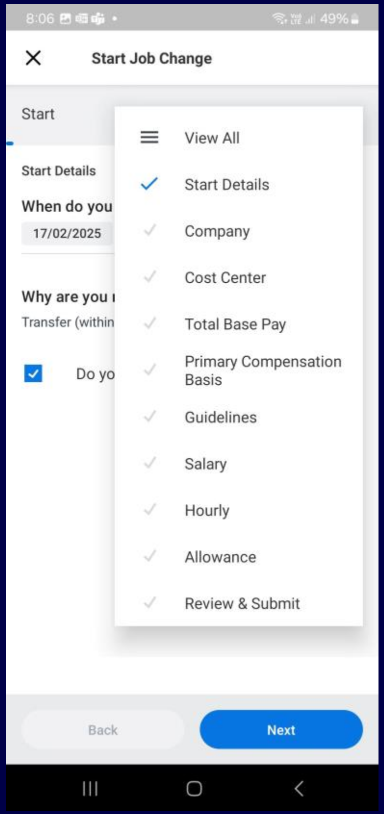
Automatically available

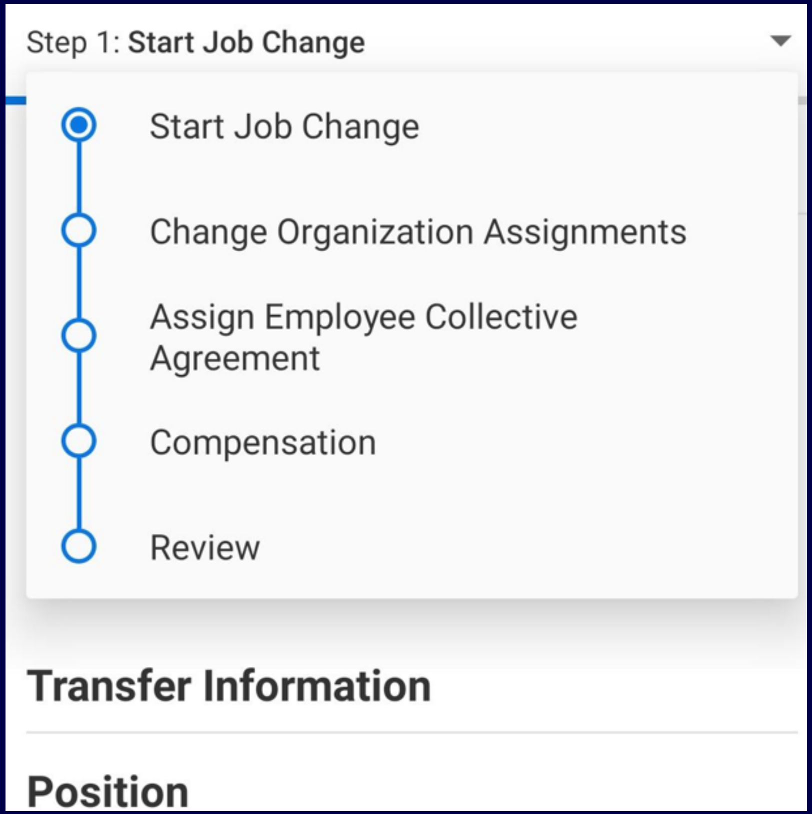
Change Job Templates New User Experience on Mobile

Impact analysis

Before the release



After the release



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Security History for Users Audit Report

What's changing?

With this release, Workday enables you to view changes in users' or organizations' security group membership within a given time frame.

Additional considerations

- Workday deliver a new Security History for Users Audit Report (secured to the Security Administration domain) that you can use to view changes in security group membership for users or organizations.
- Before you generate the report, you can use optional prompts to narrow the search parameters, including:
  - A From date field.
  - A To date field.
  - A Users prompt.
  - An Organizations prompt.

What do I need to do?

N/A

What happens if I do nothing?

N/A

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

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Automatically available

Security History for Users Audit Report, cont.

Additional considerations

- Once you generate the report, you can view information about individual security events, including the:
- Security History Event name, Security Groups Affected, Security Revoked, Security Group Type.

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

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Security History for Users Audit Report

Impact analysis

Before the release	After the release
No option to view changes in organizations' or users' security group membership within a given time frame.	You can view changes in users' or organizations' security group membership within a given time frame using this report.

Impact description
In addition to facilitating compliance with Sarbanes-Oxley auditing and reporting, this new report enables security administrators to quickly view changes in security assignments within a specific time period.

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

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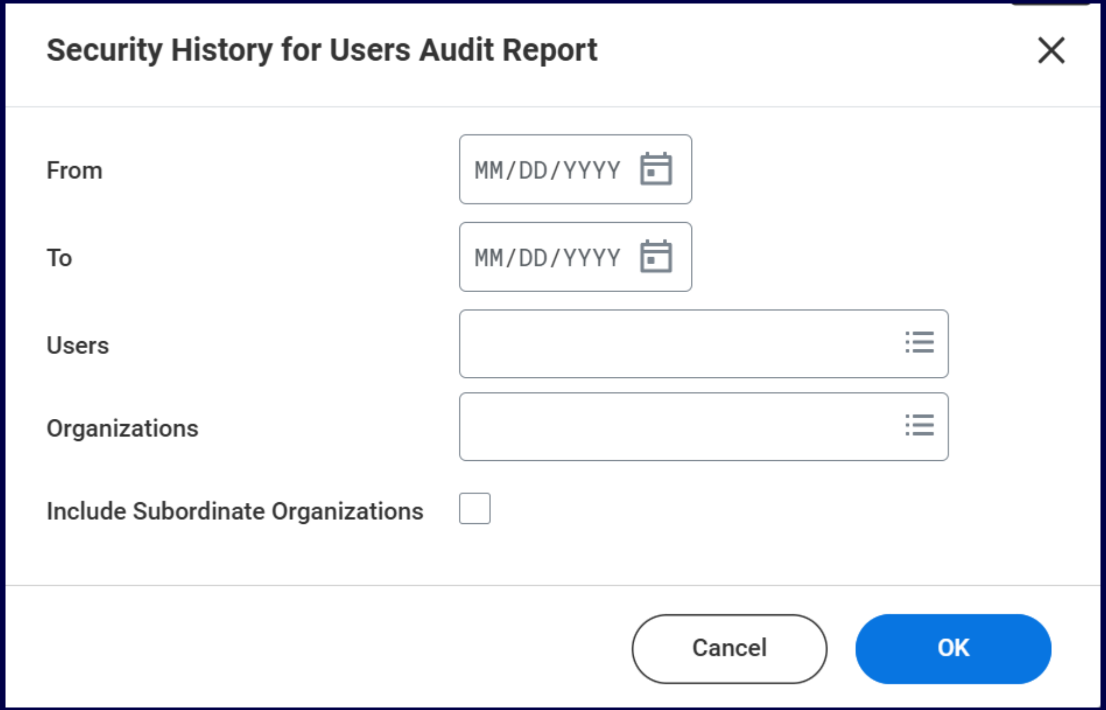
Security History for Users Audit Report

Impact analysis

Before the release

N/A

After the release



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Effective Dating for Service Dates

What's changing

You can now add effective dates to service date changes.

Additional considerations

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

What do I need to do

To prepare for this feature delivering to Production in 2025R1, workday request that customers take the following actions without delay.

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

What happens if I do nothing

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

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

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Effective Dating for Service Dates, cont.

Additional considerations

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

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

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Setup required

Effective Dating for Service Dates

Impact analysis

Before the release	After the release
Service Date changes are not effective-dated.	You can now add effective dates to service date changes.

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

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

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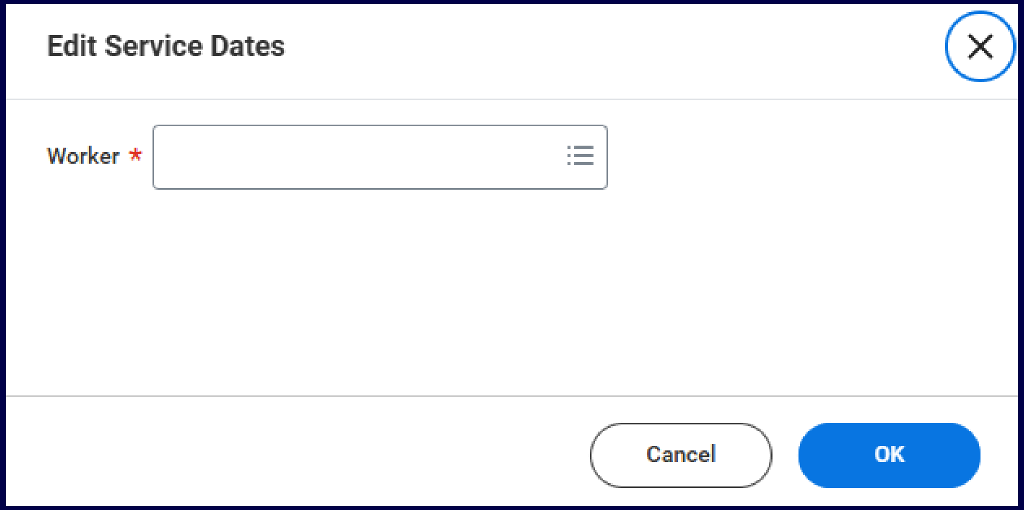
Setup required

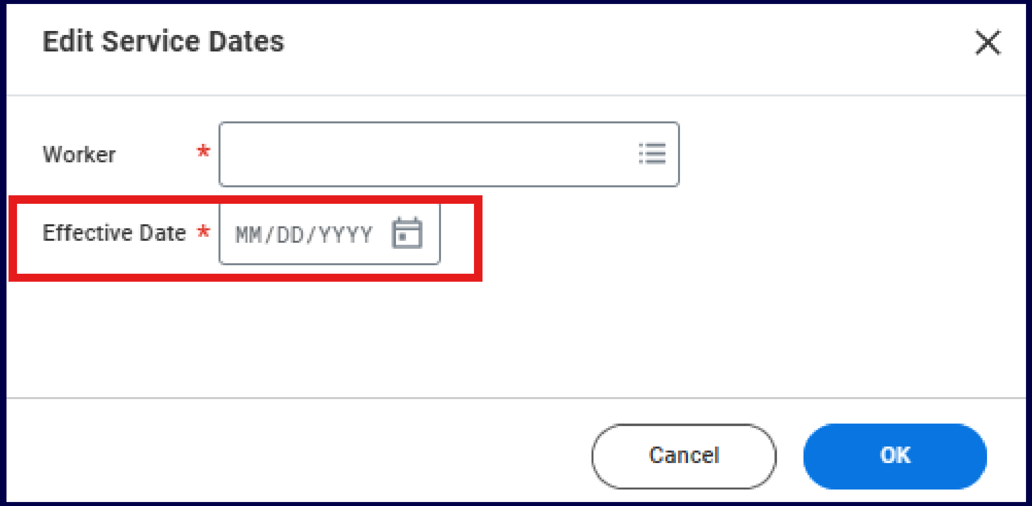
Effective Dating for Service Dates

Impact analysis

Before the release



After the release



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Job Description Generation on Job Profile

What's changing

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

Workday uses these data points to generate job descriptions:

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

What do I need to do

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

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

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

- Job Requisition Data.
- Job Posting Data.

What happens if I do nothing

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

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

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Job Description Generation on Job Profile, cont.

Additional considerations

Workday delivers a new Job Profile: Generate Job Descriptions domain (secured to the Jobs & Positions functional area) that you can use to secure access to the new Generate with AI button that uses machine learning to generate job descriptions on job profiles. Workday recommends that you configure unconstrained security groups to this domain. Generate with AI Button Workday adds a new Generate with AI button on the Job Profile field on these initiating actions for the Manage Job Profile business process, which you can use to create job descriptions using generative artificial intelligence:

- Create Job Profile

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

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Job Description Generation on Job Profile, cont.

Additional considerations

• Edit Job Profile Innovation Services Workday updates the Maintain Innovation Services Data Selection Opt-In task for this feature:

• On the Innovation Services Opt In tab, select HCM > HCM Machine Learning GA Services.

• On the Maintain Innovation Services Data Selection tab, opt-in to the Job Requisition Data and and the Job Posting Data categories. You must select the Opt In check box to contribute data to the machine learning data categories that Workday uses for Job Description Generation on Job Profile. Once you opt in, you can opt out by returning to this task.

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

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Job Description Generation on Job Profile, cont.

Additional considerations

Note: Workday only collects data for the Job Posting Data category if you have Workday Recruiting. If not, you must still opt-in to the Job Posting Data category, but Job Posting Data will not be processed in this situation. The Job Description Generation for Job Profile feature will continue to function, but with decreased insights as to customer-specific style and preferences in creating job descriptions.

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

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Job Description Generation on Job Profile

Impact analysis

Before the release	After the release
Workday does not have the ability to create job descriptions using generative artificial intelligence	Workday enables Job Description Generation on Job Profile, enabling you to quickly create job descriptions using generative artificial intelligence

Impact description
Job Description Generation on Job Profile leverages generative AI to enable users to quickly create consistent, high-quality job descriptions. This improves the data integrity of your job profiles by saving time and reducing manual effort. It provides uniformity, easy customization, and scalability to meet users’ organizational needs.

https://doc.workday.com/release-notes/en-us/efcore/8244322.html

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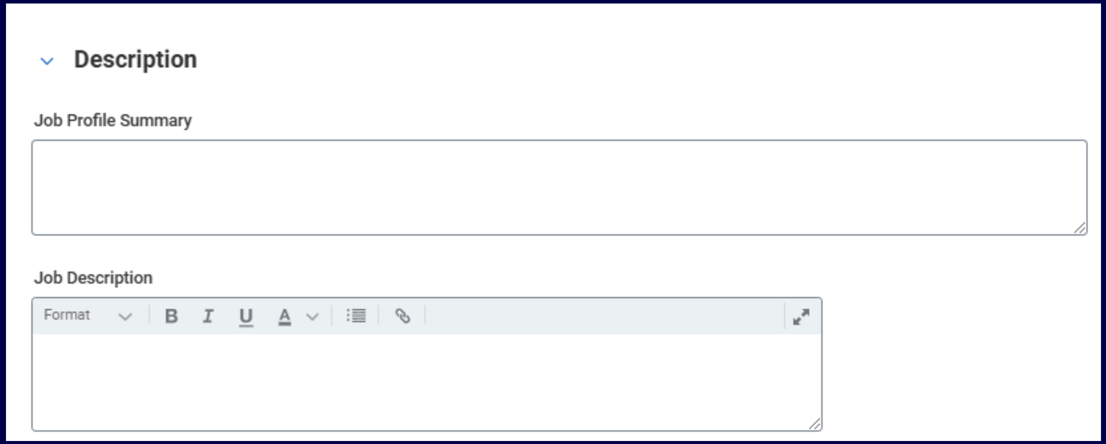
Setup required

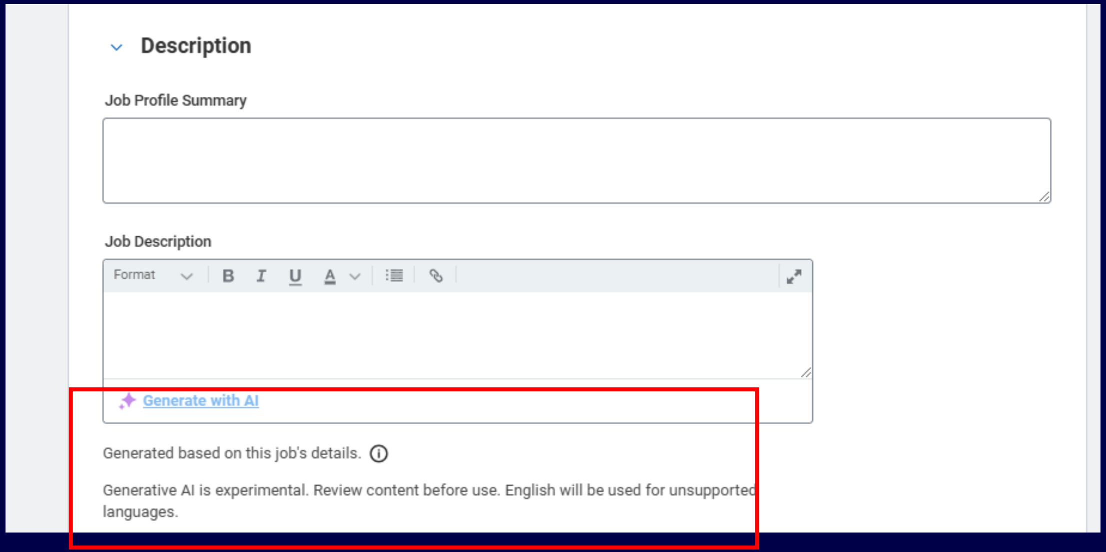
Job Description Generation on Job Profile

Impact analysis

Before the release



After the release



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US Federal Enhancements

What's changing

With this release, Workday updates the Cybersecurity Area field in the Create Position task from a single-select to a multi-select field. Workday also delivers a new Occupational Series field for the Job Family task.

Additional considerations

Cybersecurity Area Field:

- The Cybersecurity Area field is now a multi-select field.

Occupational Series:

- The Occupational Series field is a new text field in the Job Family task and is delivered hidden using Configure Optional Fields task.
- This field was created to support US Federal Occupational Series Code and can be renamed based on your organizational needs using the Maintain Custom Labels task.

What do I need to do

Cybersecurity Area Field

- The Cybersecurity Area field is automatically available, however, you should review any reports or integrations using the Cybersecurity Area field and adjust accordingly with the new multi-select option.

Occupational Series

- The new Occupational Series field is delivered hidden. Access the Configure Optional Fields task and select Create/View Job Family in the By Functional Area field to hide, unhide and control field visibility based on security groups.

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/hreg/8372080.html

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US Federal Enhancements

Impact analysis

Before the release	After the release
• The Cybersecurity Area field is a single-select field. • The Occupational Series field is not an existing field.	• The Cybersecurity Area field is now a multi-select field. • The Occupational Series field is a new text field in the Job Family task and is delivered hidden using Configure Optional Fields task.

Impact description
These enhancements provide a more flexible experience when configuring staffing actions for U.S. Federal agencies. They also ensure accuracy and completeness.

https://doc.workday.com/release-notes/en-us/hreg/8372080.html

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Setup required

US Federal Enhancements

Impact analysis

Before the release

3 items

Report Fields	Related Business Object	Description	Field Type
Cybersecurity Area (Report Field)	Cybersecurity Area	The Cybersecurity Area for the Position Restriction.	Single instance
Hiring Restrictions Current - Cybersecurity Area (Report Field)	Cybersecurity Area	The Cybersecurity Area for Position Restrictions before the completion of this business process.	Single instance
Hiring Restrictions Proposed - Cybersecurity Area (Report Field)	Cybersecurity Area	The Cybersecurity Area for Position Restrictions at the completion of this business process.	Single instance

After the release

3 items

Report Fields	Related Business Object	Description	Field Type
Cybersecurity Area (Report Field)	Cybersecurity Area	The Cybersecurity Area for the Position Restriction.	Multi-instance
Hiring Restrictions Current - Cybersecurity Area (Report Field)	Cybersecurity Area	The Cybersecurity Area for Position Restrictions before the completion of this business process.	Multi-instance
Hiring Restrictions Proposed - Cybersecurity Area (Report Field)	Cybersecurity Area	The Cybersecurity Area for Position Restrictions at the completion of this business process.	Multi-instance

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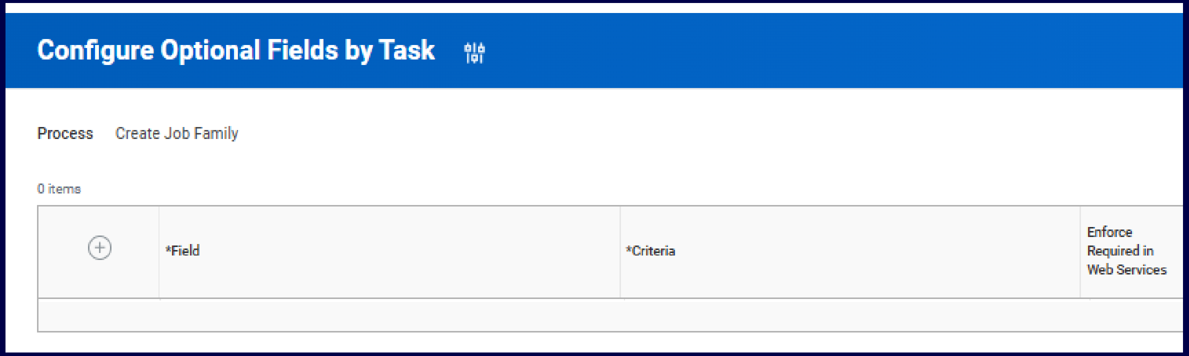
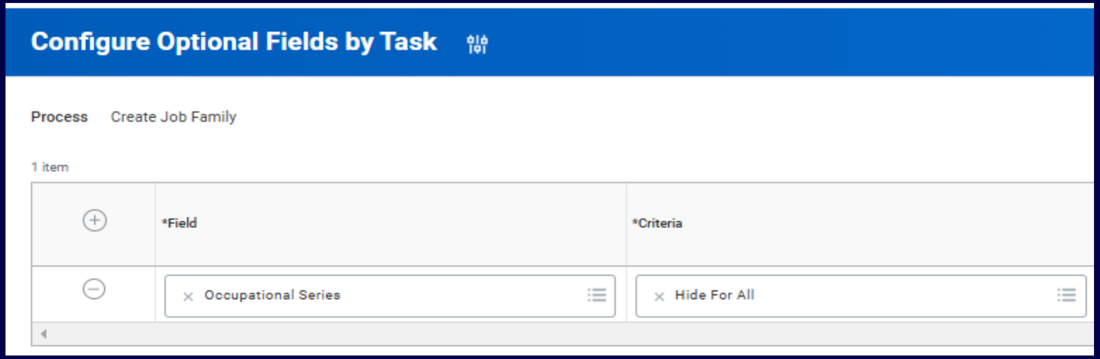
US Federal Enhancements, cont.

Impact analysis

Before the release



After the release



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Rescind Manage Job Profile Business Process

What's changing

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

What do I need to do

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

Additional considerations

Workday enables you to rescind the Manage Job Profile business process. You can
You can configure which unconstrained security groups can access these actions for the Manage Job Profile business process on the Edit Business Process Security Policy task:

What happens if I do nothing

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

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

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Rescind Manage Job Profile Business Process, cont.

Additional considerations

Rescind

Rescind (Web Service)

When configured, users can rescind a Manage Job Profile business process event from the:

- Related action of the Manage Job Profile event.
- Mass Rescind task.
- Rescind web service.

When a Manage Job Profile event is rescinded:

- It's removed from the Business Process History tab on the Job Profile report. The Job Profile report displays data as of the effective date, and doesn't display the rescinded data.

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

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Rescind Manage Job Profile Business Process, cont.

Additional considerations

You can view it from the Audits > View Audit Trail related action on the associated job profile.

- The Job Code on the associated job profile remains the same.

You can't rescind:

- The earliest event in the Manage Job Profile business process, unless the job profile existed before the introduction of the Manage Job Profile business process on 2024-03-09.
- Changes made to the job profile before the introduction of the Manage Job Profile business process. Those changes were not a business process event, and therefore can't be rescinded.

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

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Rescind Manage Job Profile Business Process

Impact analysis

Before the release	After the release
Workday doesn’t allow you to rescind the Manage Job Profile business process	Workday now enables you to rescind the Manage Job Profile business process

Impact description
This feature provides an ability to rescind completed events and restore data to the state it was in before the business process instance ran.

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

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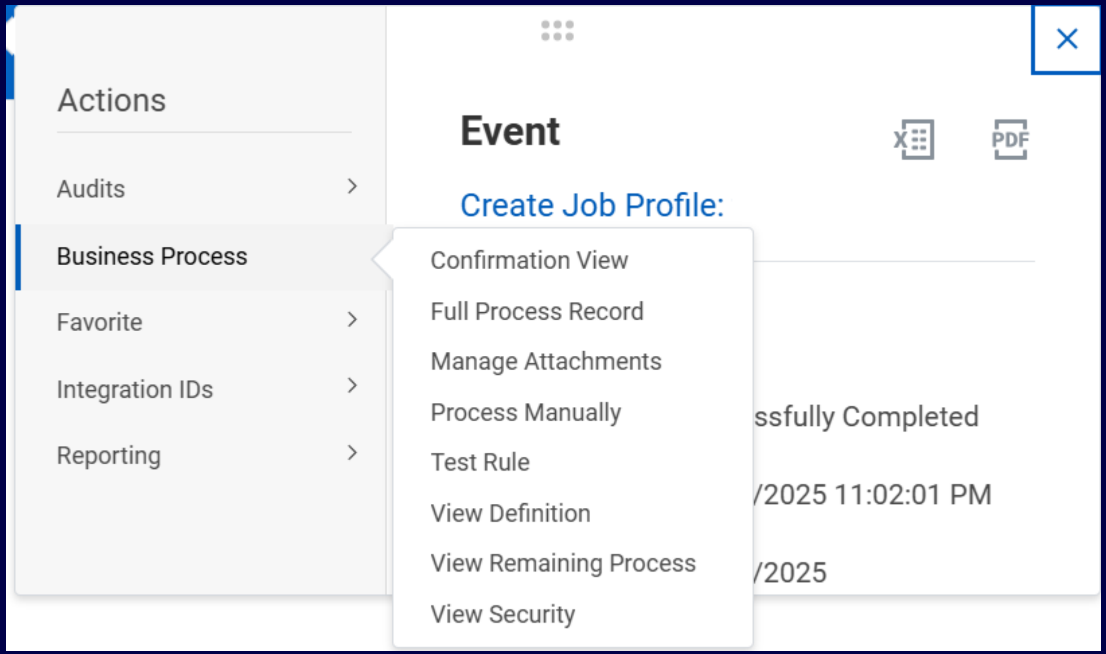
Setup required

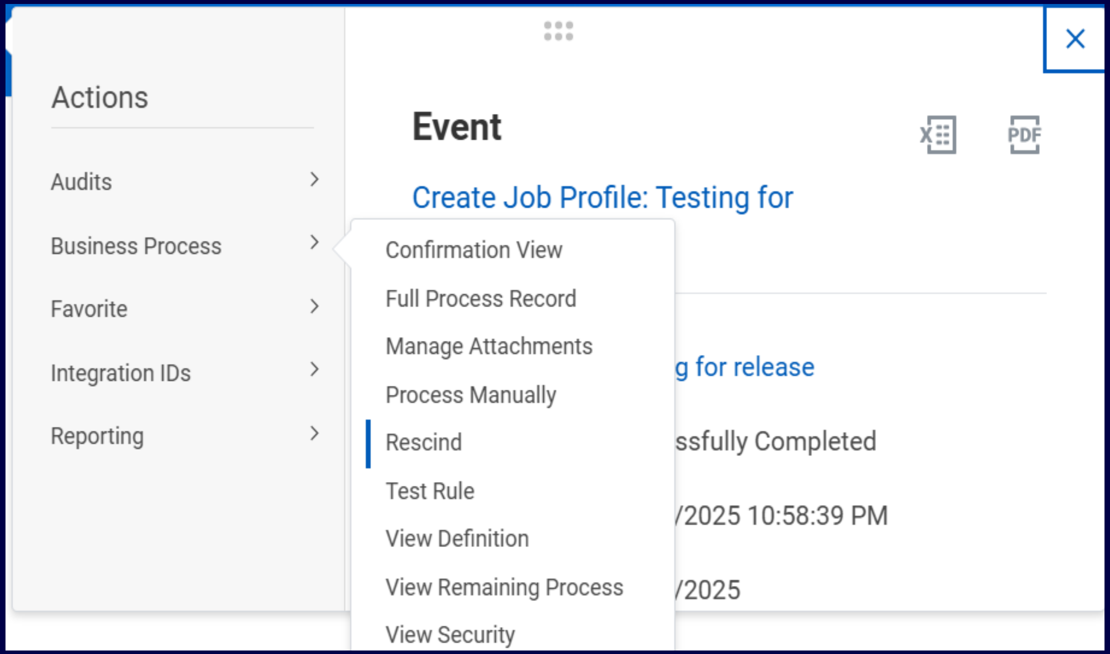
Rescind Manage Job Profile Business Process

Impact analysis

Before the release



After the release



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US Federal Personnel Action Request - Create Printable SF52

What’s changing

With this release, Workday enables the ability to generate a printable PDF of the SF52-Request for Personnel Action Request (PAR).

Additional considerations

You can now generate a printable PDF of the SF52-Request for events associated with a Personnel Action Request (PAR). Custom Report Fields will pull in Workday data from worker events to populate the printable SF52.

What do I need to do

This feature is specific to Federal US Customers only. This option is not accessible for ESS employees.

To create a printable PDF:

1. Select the Print Option from the related actions for a PAR Business Process Event.
2. In the Print Notification of Personnel Action (SF-52) task, search for the PAR Business Process Event by Worker Name or PAR Event Name, select the Confirm button, then select OK.

Condition must be met to generate a printable SF52 PDF, a PAR event must be initiated, canceled & completed.

What happens if I do nothing

This feature is specific to Federal US Customers only. If you don't select the Confirm button for the for the Print Notification of Personnel Action (SF-52) task you will not be able to generate a printable PDF.

https://doc.workday.com/release-notes/en-us/hreg/8646182.html

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US Federal Personnel Action Request - Create Printable SF52

Impact analysis

Before the release	After the release
Workday doesn’t allow you to rescind the Manage Job Profile business process	Workday now enables you to rescind the Manage Job Profile business process

Impact description
This feature provides an ability to rescind completed events and restore data to the state it was in before the business process instance ran.

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

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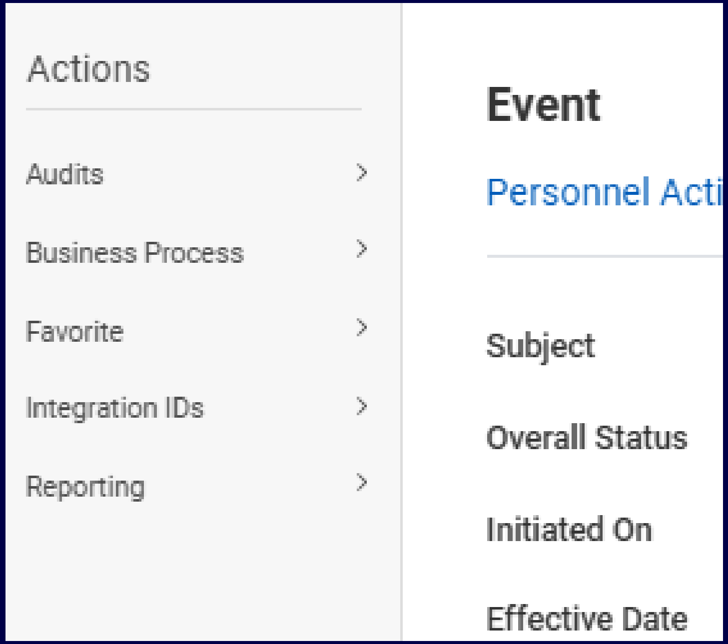
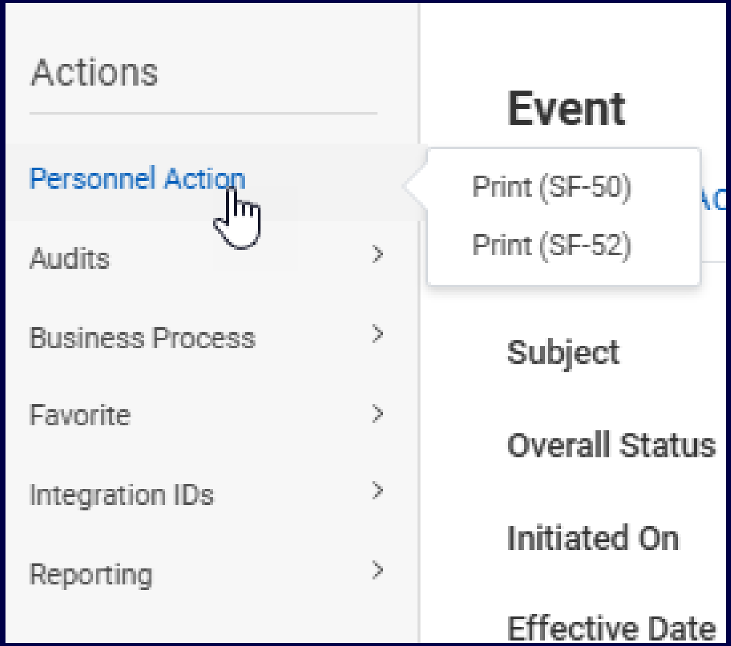
US Federal Personnel Action Request - Create Printable SF52

Impact analysis

Before the release



After the release



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Remove Multiple Matrix Members from Matrix Organizations

What's changing

With 2025R1, Workday continues to improve matrix organizations by enabling you to remove multiple matrix members from a matrix organization.

Additional considerations

Workday adds:

- The *Remove Multiple Matrix Members* business process (secured to the Organizations and Roles functional area).
- The **Remove Multiple Matrix Members** task (secured to the Organizations and Roles functional area).
- You can use the business process and task to remove multiple workers and their corresponding positions from matrix organizations in bulk.

What do I need to do

- Configure the business process security policy for the *Remove Multiple Matrix Members* business process. Note that Initiating and Processing Actions are restricted to Roles-Matrix and Unconstrained security groups.
- Review the default business process definition for *Remove Multiple Matrix Members* business process and make any necessary updates according to your business needs.

Note: When you configure the approval step for Remove Multiple Matrix Members, the approver will be able to review the entire list of workers and the associated positions that will be removed.

What happens if I do nothing

- You won't be able to use the new **Remove Multiple Matrix Members** task.

https://doc.workday.com/release-notes/en-us/hrcore/8256960.html

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Setup required

Remove Multiple Matrix Members from Matrix Organizations

Impact analysis

Before the release	After the release
Unable to remove multiple matrix members from Matrix Organizations	You can now remove multiple matrix members from a matrix organization via Remove Multiple Matrix Members Business Process & Task

Impact description
This update reduces manual processes and improves efficiency by enabling you to remove multiple matrix members from a matrix organization in bulk.

https://doc.workday.com/release-notes/en-us/hrcore/8256960.html

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Setup required

Remove Multiple Matrix Members from Matrix Organizations

Impact analysis

Before the release

N/A

After the release

Remove Multiple Matrix Members

Type	Task
On Menu	Menu: Organizations
Related Menu Path	Organization > Remove Multiple Matrix Members
Permission Required	Modify
Hidden Workday Delivered Report	No

Business Process Security   Language Restrictions

Business Process Security 1 item

Initiating Action for Business Process	Action Step for Business Process	Functional Area	Security Groups Needed
Remove Multiple Matrix Members		Organizations and Roles	

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U.S. Federal Personnel Action Requests - Add and End Additional Jobs

What's changing?

With this release, Workday delivers enhancements to the Personnel Action Requests (PAR) feature to improve efficiency and flexibility in managing PAR requests.

Additional considerations

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

- Add Additional Job.
- End Additional Job.

What do I need to do?

- This feature is specific to Federal US Customers. If required, enable PAR as a subprocess in the Add Additional Job and End Additional Job business processes.
- Personnel Action Request can be added to the Add Additional Job business process either before or after the completion step.
- Personnel Action Request Step can be added to the End Additional Job business process before the completion step.

What happens if I do nothing?

If you do nothing there is no impact.

https://doc.workday.com/release-notes/en-us/hreg/8432557.html

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U.S. Federal Personnel Action Requests - Add and End Additional Jobs

Impact analysis

Before the release	After the release
Personnel Action Request (PAR) was not available as a subprocess of the business processes listed. • Add Additional Job • End Additional Job	It is now available to be enabled as a subprocess of the said business processes.

Impact description
Personnel Action Request (PAR) is now available to be enabled as a subprocess of the business processes - Add Additional Job and End Additional Job.

https://doc.workday.com/release-notes/en-us/hreg/8432557.html

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U.S. Federal Personnel Action Requests - Add and End Additional Job

Impact analysis

Before the release

N/A

After the release

Business Process Configuration Options

Filter by Business Process Type Personnel Action Request **Return Business Processes for which the selected are allowed Subprocesses** Yes

252 items

Business Process Type	Description	Subprocess Only	Allowed Subprocess For	Valid for Usages	Approvable	Ad Hoc Approva
Add Additional Job	Add an additional job for an existing employee. The employee must have a completed hire.		Add Additional Job	Supervisory	Yes	Y

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Setup required

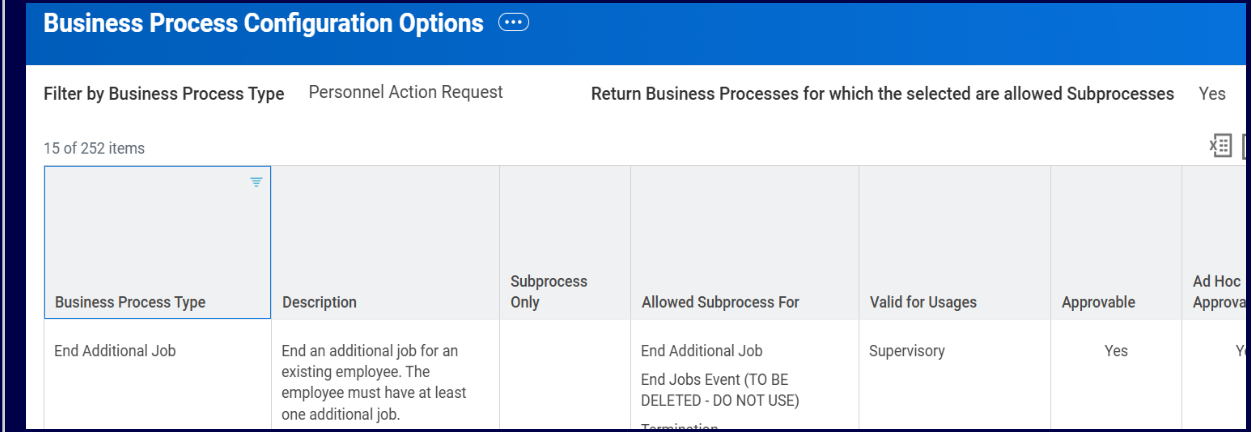
U.S. Federal Personnel Action Requests - Add and End Additional Job, cont.

Impact analysis

Before the release

N/A

After the release



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View Additional Organizations on Org Chart Side Panel

What's changing?

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

Additional considerations

- Workday update the Edit Tenant Setup - HCM task with a new Additional Organization View check box in the Always Hide field of the Org Chart section.

What do I need to do?

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

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

- All workers have access to at least one position information (security specified above).
- There are no restricted organization views as defined by organization visibility.

What happens if I do nothing?

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

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

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View Additional Organizations on Org Chart Side Panel, cont.

Additional considerations

- You can enable this feature by clearing the Additional Organization View check box.
- When the check box is cleared, Workday now displays an icon on the worker in the organization chart if the worker is in 1 or more of the following scenarios:
  - Manager or member of an active matrix org.
  - Manages more than 1 active supervisory org.
  - Has multiple positions.

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

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

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View Additional Organizations on Org Chart Side Panel, cont.

Additional considerations

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

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

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

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

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View Additional Organizations on Org Chart Side Panel, cont.

Additional considerations

The organizations are listed in this order:

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

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

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

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

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

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

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View Additional Organizations on Org Chart Side Panel, cont.

Additional considerations

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

If you opt-in to the feature, you will be able to see the supervisory and matrix organizations. No additional organization domain security policy is applied. Organization visibility configured for individual organizations will still be respected. Example: If organizations are configured to only be seen by certain roles, only the assignees for those roles will be able to see the organizations.

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

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View Additional Organizations on Org Chart Side Panel, cont.

Additional considerations

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

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

Limitations:

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

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

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View Additional Organizations on Org Chart Side Panel

Impact analysis

Before the release	After the release
No option to view additional organizations of the worker to which he belongs or manages.	Matrix and supervisory organizations that workers belong to or manage can be viewed from a side panel of the org chart.

Impact description
This feature provides workers, particularly matrix organization members and managers, with the visibility they need to visualize and understand their organizational structure.

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

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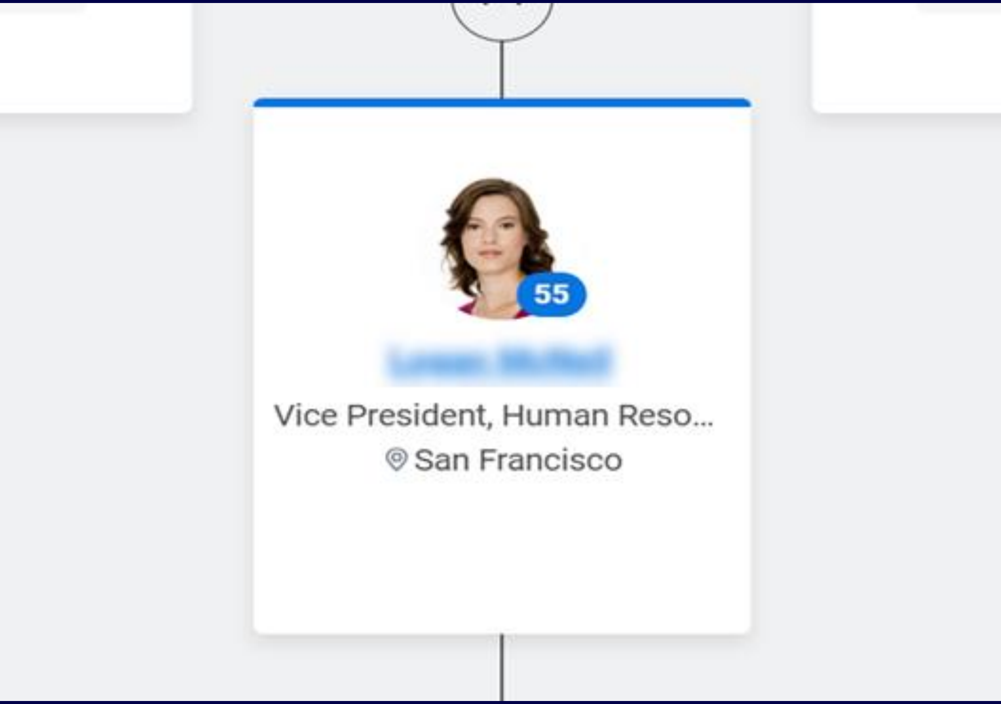
Setup required

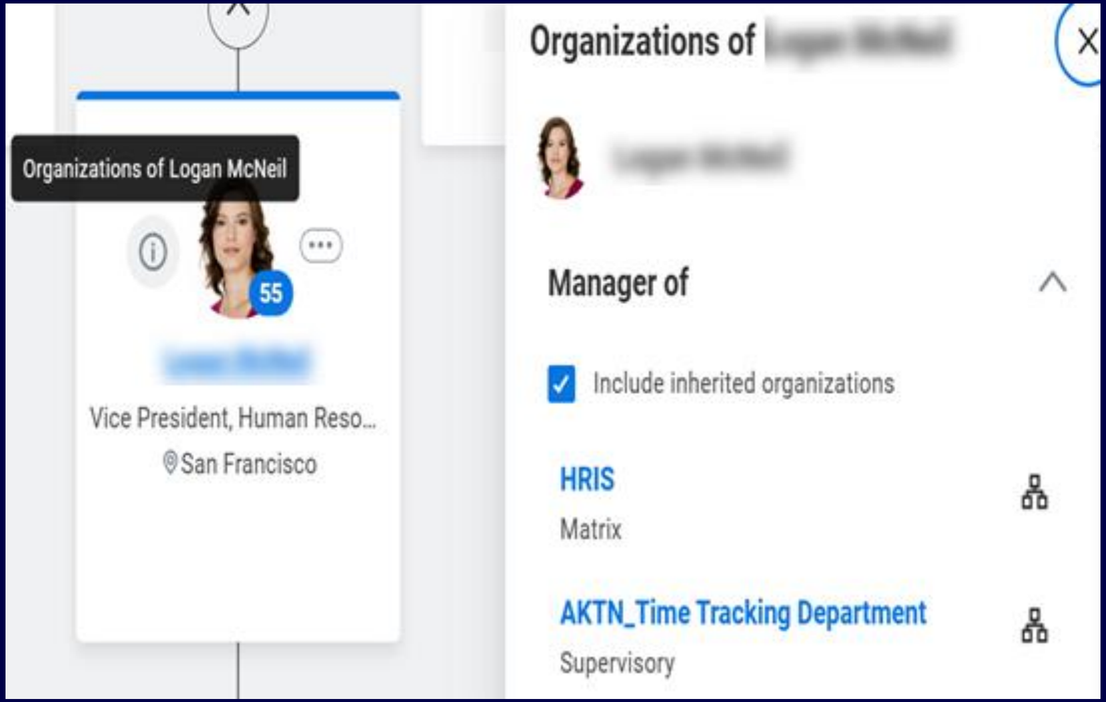
View Additional Organizations on Org Chart Side Panel

Impact analysis

Before the release



After the release



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Setup required

Configure Optional Fields for Change Job

What’s changing

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

Additional considerations

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

- Academic - Annual Work Period.
- Academic - Work Period Percent of Year.
- Academic - Disbursement Plan Period.
- Employee Type.
- Time Type.

What do I need to do

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

- Configure the fields for your company.
- Test your configuration and update your training materials.

What happens if I do nothing

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

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

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Configure Optional Fields for Change Job, cont.

Additional considerations

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

- Working Time.
- Contingent Worker Type.
- Select a Job Requisition for this change.
- This person is a manager. Will their team be moving with them?
- Currency.
- Frequency.
- Job Profile.
- Which team will this person be moving to?
- Who will be this person's manager after the move?
- Work Hours Profile.
- Location.

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

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Setup required

Configure Optional Fields for Change Job

Impact analysis

Before the release	After the release
There was no option of configuring any additional Change Job Fields through the Configure Optional	Workday now enables you to configure additional Change Job fields on the Configure Optional Fields task.

Impact description
This provides you with the flexibility to: • Hide fields you don't use. • Require fields that are important to you. • Control field visibility based on security groups.

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

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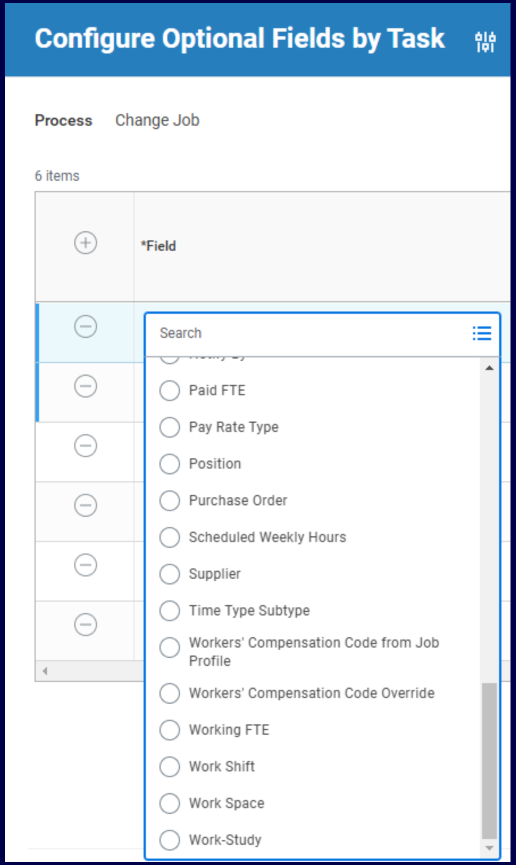
Setup required

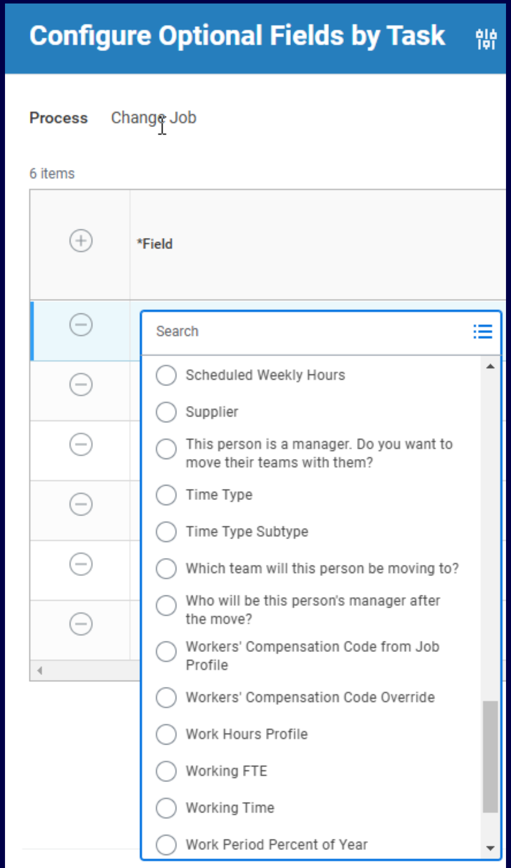
Configure Optional Fields for Change Job

Impact analysis

Before the release



After the release



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Configure Additional Address Components

What's changing

Workday continues to improve how you configure address components by country, giving you greater control over address information to meet the needs of your organization.

Additional considerations

Workday now add new features for address components. You can: Add an existing component type to a country on the Maintain Address Components by Country task. A new validation on the task reminds you that updating address configurations can impact integrations. Use additional address components by country when you enter or update address information. You can see the new components when you edit a home or work address. View the updated configuration on the View Address Components by Country report. Configure these label overrides for address components on the Maintain Address Components by Country task:

What do I need to do

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

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

What happens if I do nothing

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

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

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Configure Additional Address Components, cont.

Additional considerations

- Address Line 1 – Katakana
- Address Line 2 – Katakana
- Address Line 2 – Katakana
- City/Ward/Town – Katakana
- Neighborhood – Katakana
- Care of
- External Number
- Internal Number
- Zip Code

Workday also delivers the new Address Component Sync for Get Web Services feature opt-in on the Maintain Feature Opt-Ins report. Before opting in, you should:

- Access the View Address Component Configuration Sync report to confirm consistency of address components in Workday and web services.
- Review and resolve any inconsistencies identified in the report.
- Submit configuration changes made on the Address Components tab on the Maintain Address Components by Country task.

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

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Configure Additional Address Components, cont.

Additional considerations

Once you opt in, you can't opt out. Configuration changes that you make on the Address Components tab don’t impact Recruiting Address Components. You can update Recruiting Address Components on the Recruiting Address Component tab on the Maintain Address Components by Country task.

New components Include:

- Address 7
- Address 8
- Address 9
- City Subdivision 1
- City Subdivision 2
- Region Subdivsion 2

Workday also adds the new address components to these Recruiting web services:

- Get Candidates Put Candidates Refer a Candidate Submit Recruiting Agency Candidate

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

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Configure Additional Address Components

Impact analysis

Before the release	After the release
Workday gave lesser control over how to configure address components for example by country.	Workday continues to improve how you configure address components by country, giving you greater control over address information to meet the needs of your organization.

Impact description
You can add new address components by country for all addresses in Workday so that you collect the address data that's relevant to your business. This provides a better user experience and saves time, which helps your organization with: • Compliance: you can meet government requirements to capture specific address data. • Flexibility and Speed: you have greater flexibility for how you collect and use address data to meet your integration needs. • Global Expansion: you can customize address formats by country, enabling you to collect accurate and complete address data so that business processes run smoothly. .

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

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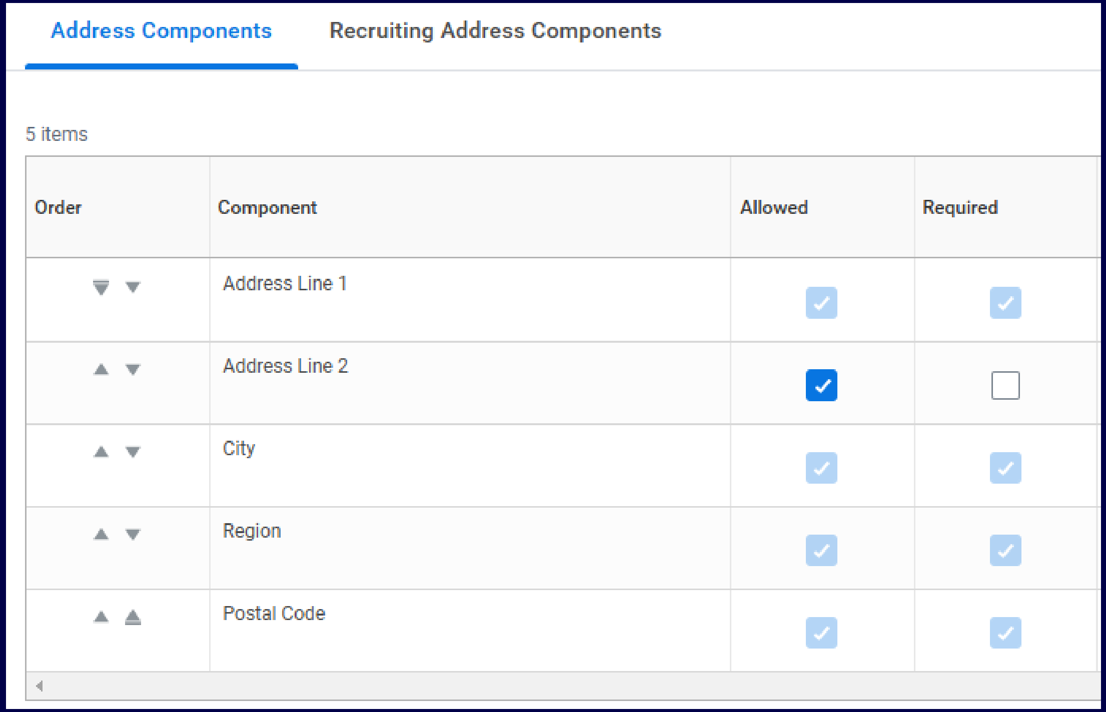
Setup required

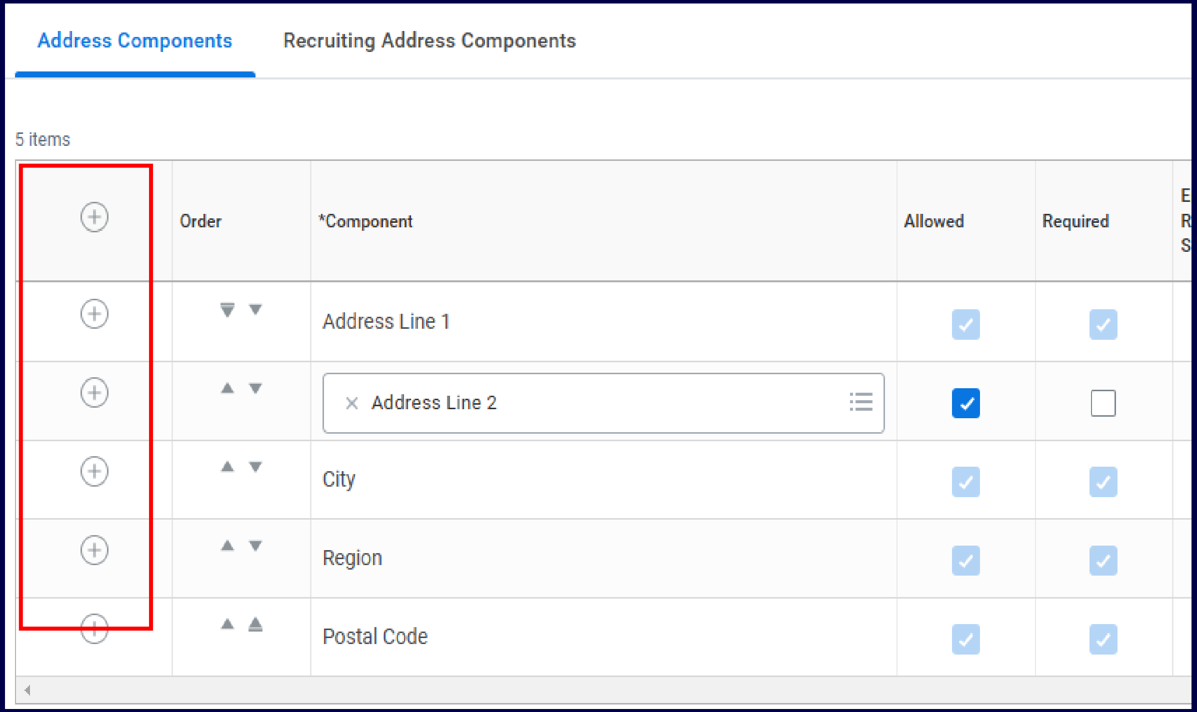
Configure Additional Address Components

Impact analysis

Before the release



After the release



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Help Text and Additional Links for Modals

What's changing

Workday enhance business process help text and additional links to progressively disclose in modals.

What do I need to do

N/A

Additional considerations

Workday plans to remove the ability to opt out and the Help Text and Additional Links for Modals feature from the Maintain Feature Opt-Ins task in a future update, after the completion of redesign work.

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/uiplatform/8116870.html

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Help Text and Additional Links for Modals

Impact analysis

Before the release	After the release
Workday gave control over how to configure address components by country.	With this release, workday enhance business process help text and additional links to progressively disclose in modals.

Impact description
This update provides better navigation and ease of use. .

https://doc.workday.com/release-notes/en-us/uiplatform/8116870.html

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Setup required

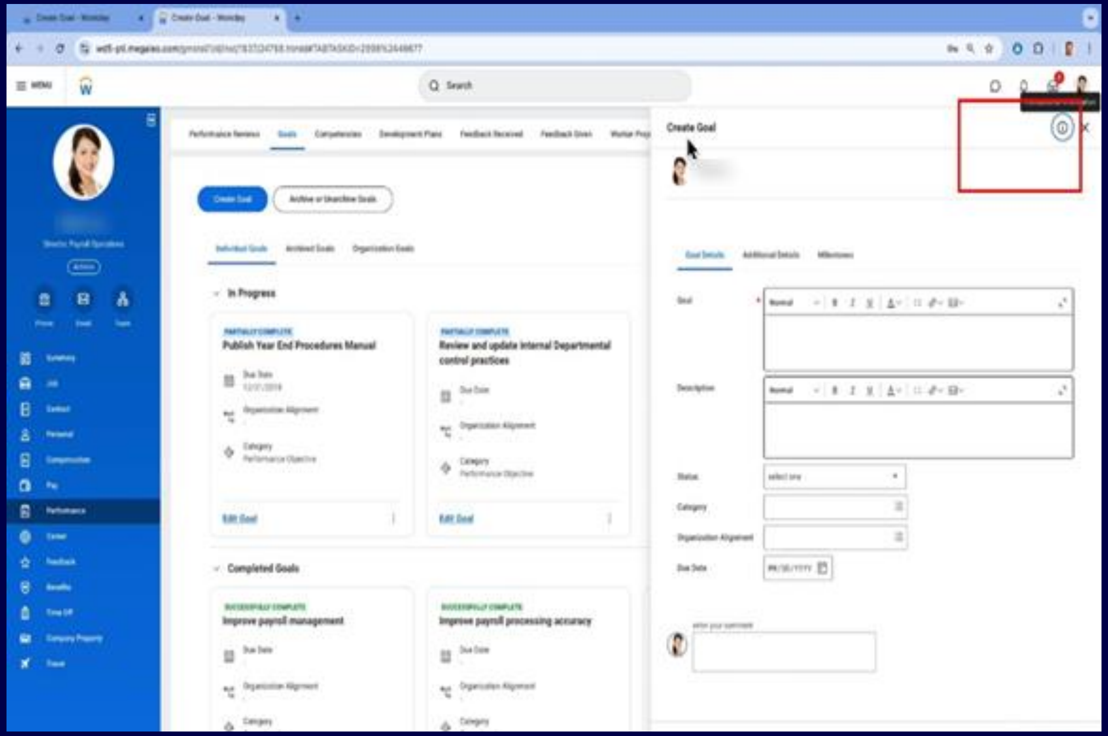
Help Text and Additional Links for Modals

Impact analysis

Before the release

N/A

After the release



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Customer Accounts

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

What's changing

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

What do I need to do

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

Additional considerations

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

What happens if I do nothing

There is no impact.

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

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Automatically available

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

Impact analysis

Before the release	After the release
N/A	N/A

Impact description
Performance improvement in Customer Payment Auto-Application task.

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

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Customer/Sponsor for Transaction Report Field

What's changing

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

What do I need to do

Nothing. This feature is automatically available.

Additional considerations

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

You can use this report field in custom reports.

What happens if I do nothing

N/A

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

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Customer/Sponsor for Transaction Report Field

Impact analysis

Before the release	After the release
N/A	N/A

Impact description
This feature provides consistency in viewing the customers and sponsors associated with a customer deposit in custom reports.

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

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Local Commodity Codes on Invoice Lines

What's changing

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

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

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

Additional considerations

N/A

What do I need to do

Nothing. This feature is automatically available.

What happens if I do nothing

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

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

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Local Commodity Codes on Invoice Lines, cont.

Additional considerations

You can now select active commodity codes on the Commodity Code prompt in the Invoice Lines grid on these tasks: Create Customer Invoice Create Customer Invoice Adjustment Record Cash Sale Workday also enables you to update commodity codes when you edit, change, review, revise, or correct the invoice lines originating from these tasks. To enable the Commodity Code prompt, you:

- No longer need to populate a sales item in the grid.
- Must configure commodity code types and add commodity codes in your tenant. You can select only 1 active code per commodity code type.

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

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Local Commodity Codes on Invoice Lines, cont.

Additional considerations

For v43.0, Workday updates these web services to no longer return an error when you add active commodity codes that aren't associated with sales items: Bulk Import Customer Invoice Import Customer Invoice Submit Cash Sale Submit Customer Invoice Submit Customer Invoice Adjustment See the SOAP API Change Log link under Related Information.

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

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Local Commodity Codes on Invoice Lines

Impact analysis

Before the release	After the release

Cannot select commodity codes without populating sales item in tasks and webservice.	• Can select active commodity codes on the Commodity Code prompt in the Invoice Lines grid of below tasks *without populating sales item:*
	  • Create Customer Invoice.
	  • Create Customer Invoice Adjustment.
	  • Record Cash Sale tasks.
	
	• Below web services will no longer return an error when you add active commodity codes that *aren't associated with sales items:*
	  • Bulk Import Customer Invoice.
	  • Import Customer Invoice.
	  • Submit Cash Sale.
	  • Submit Customer Invoice.
	  • Submit Customer Invoice Adjustment.

Impact description
This enhancement helps you better align with the local industry standards without utilizing the sales item functionality.

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

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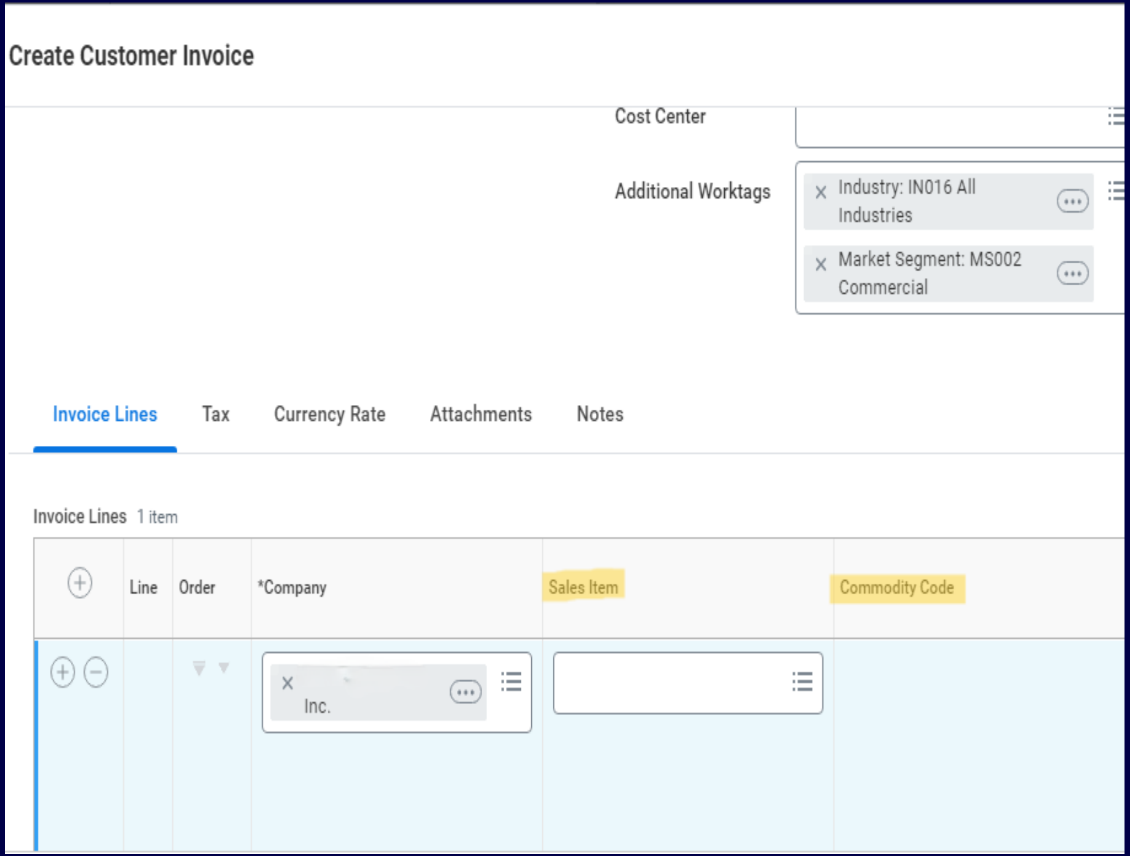
Local Commodity Codes on Invoice Lines

Impact analysis

Before the release



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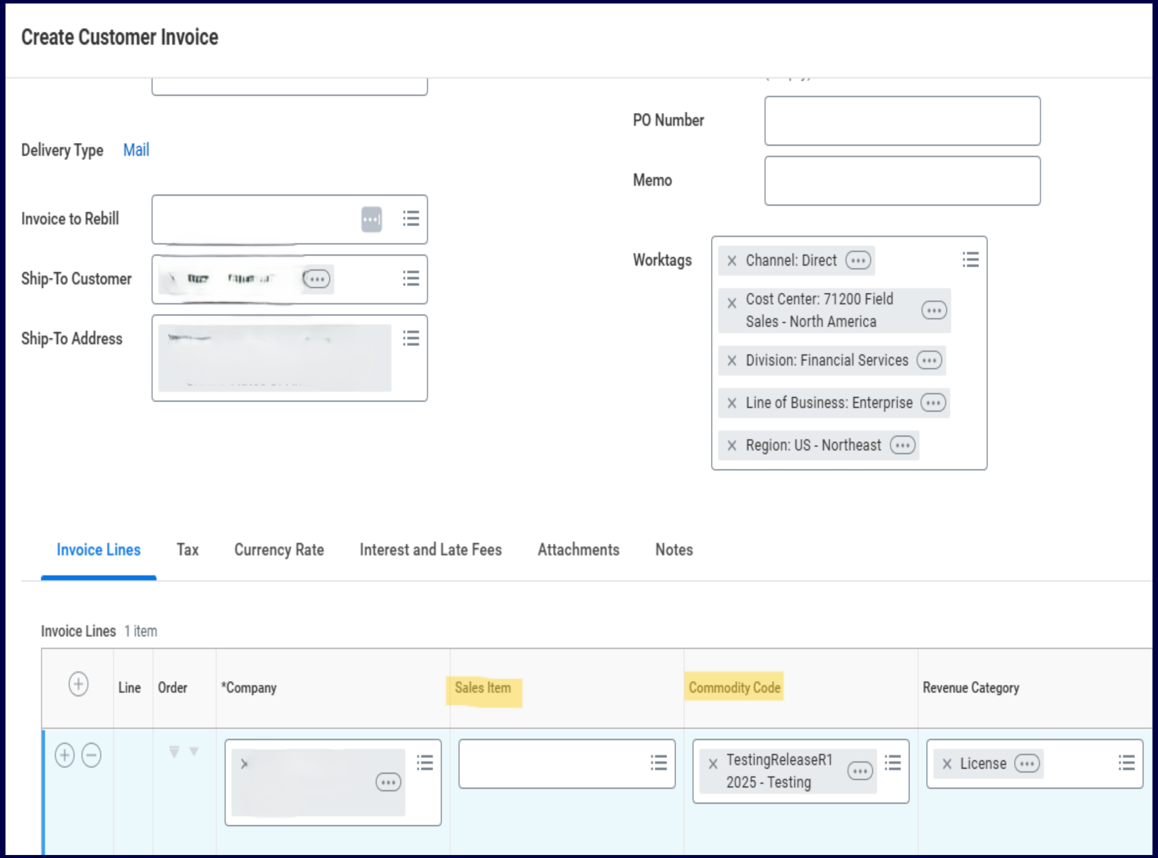
After the release



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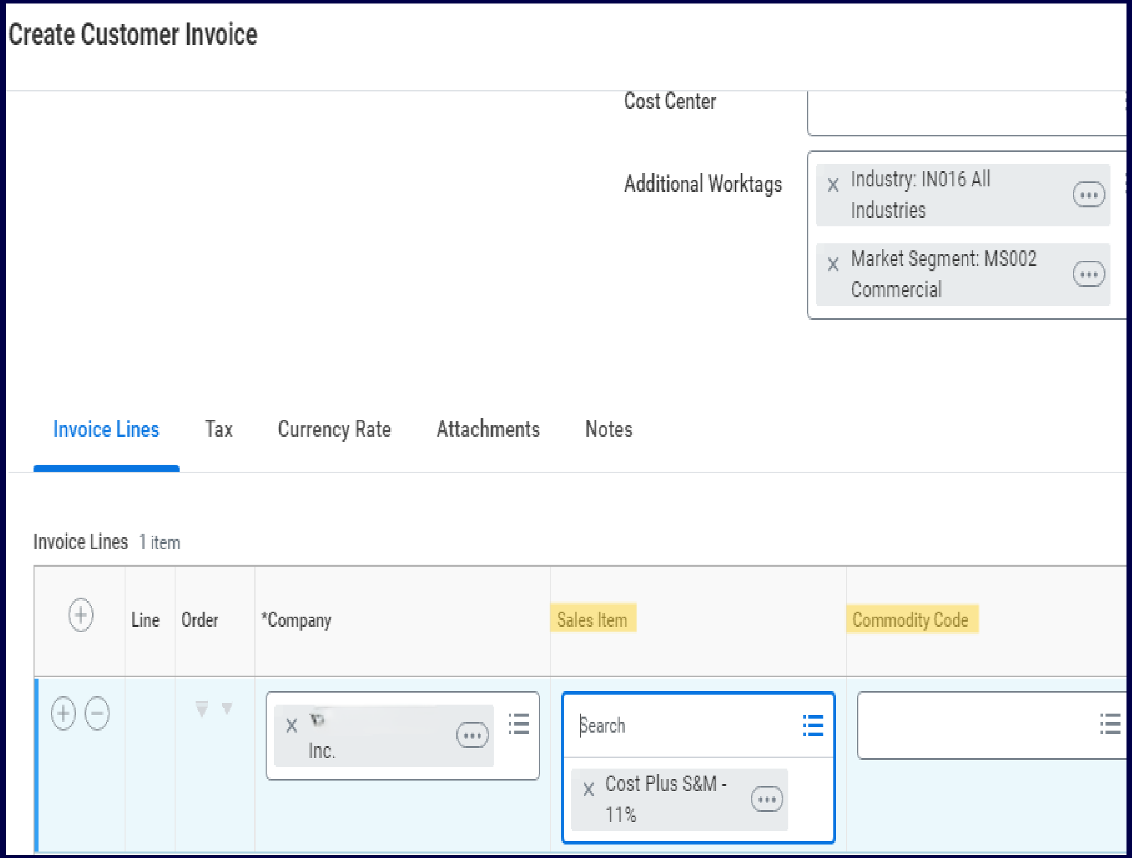
Local Commodity Codes on Invoice Lines, cont.

Impact analysis

Before the release



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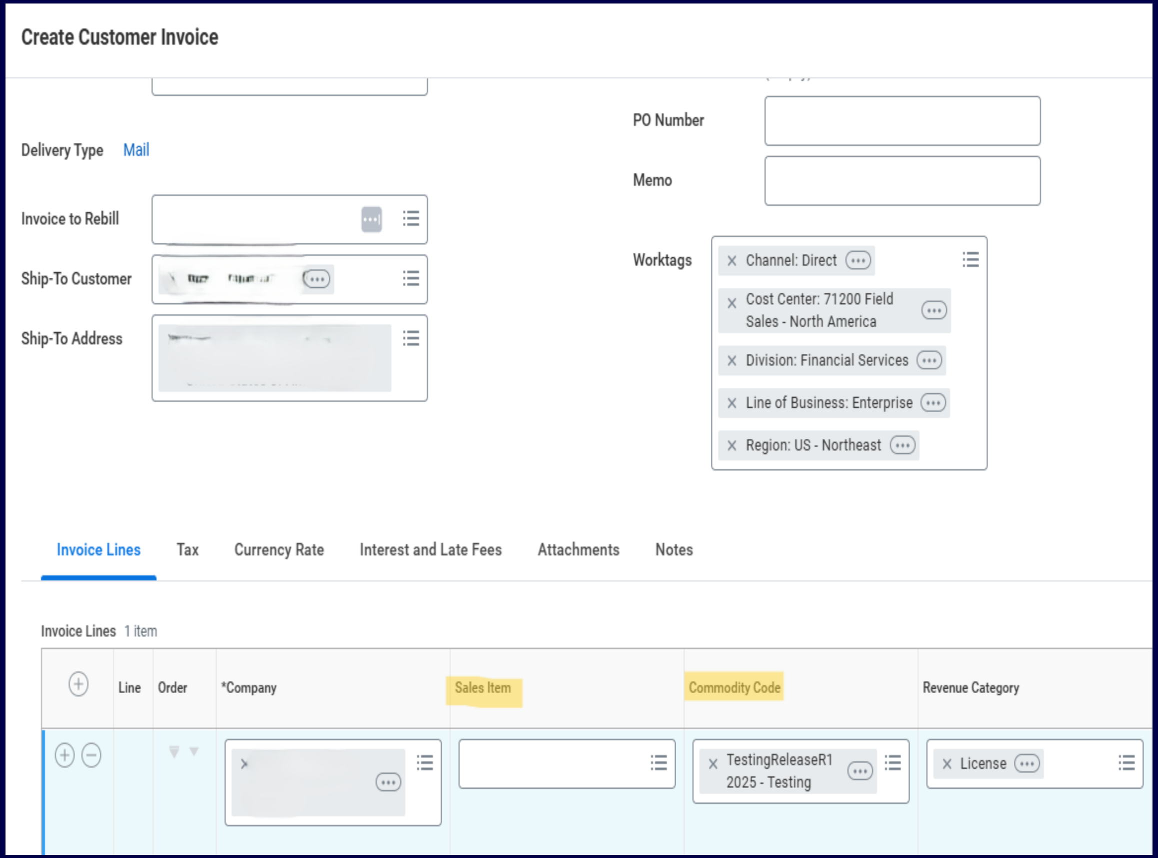

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View Intercompany Receipt Fields

What's changing

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

- Intercompany Payment
- Intercompany Invoice Type

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

The changes are available for both types of intercompany receipts: Direct and On Behalf Of

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

What do I need to do

Nothing. This feature is automatically available.

What happens if I do nothing

N/A

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

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View Intercompany Receipt Fields, cont.

Additional considerations

Workday now adds these new fields on the View Intercompany Receipt report: Intercompany Payment Intercompany Invoice Type Workday also displays transaction IDs in the Transaction field in the Intercompany Items grid of the report. The changes are available for these types of intercompany receipts: Direct On Behalf Of Workday delivers a new Amount Applied field in the Intercompany Items grid of the report that Workday displays for the direct intercompany receipts. Workday delivers these new report fields on the Intercompany Receipt business object (secured to the Public Reporting Items domain) that you can use in custom reports to view the intercompany invoice and payment information: Intercompany Invoice Type Intercompany Payment

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

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View Intercompany Receipt Fields

Impact analysis

Before the release	After the release
N/A	Additional details visible in the View Intercompany Receipt report

Impact description
This enhancement improves your ability to trace intercompany receipt activity back to intercompany payments and reconcile amounts applied to customer invoices, providing a better user experience and greater accessibility.

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

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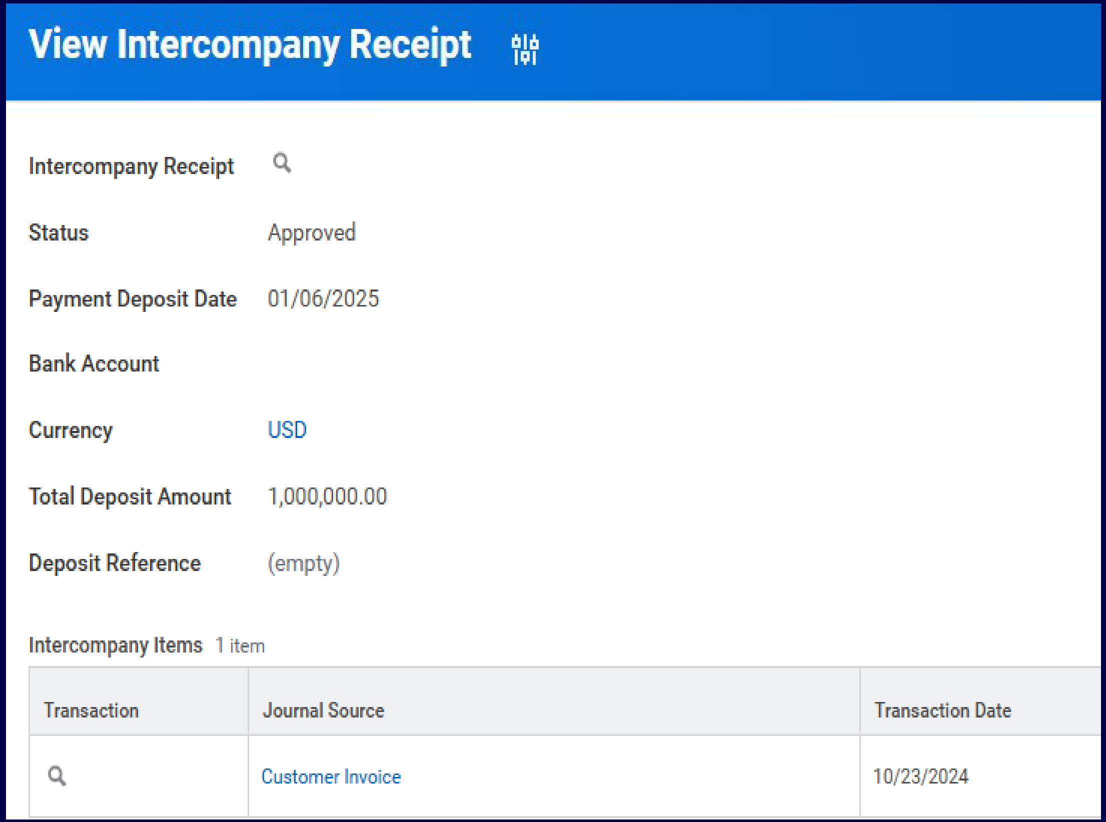
Automatically available

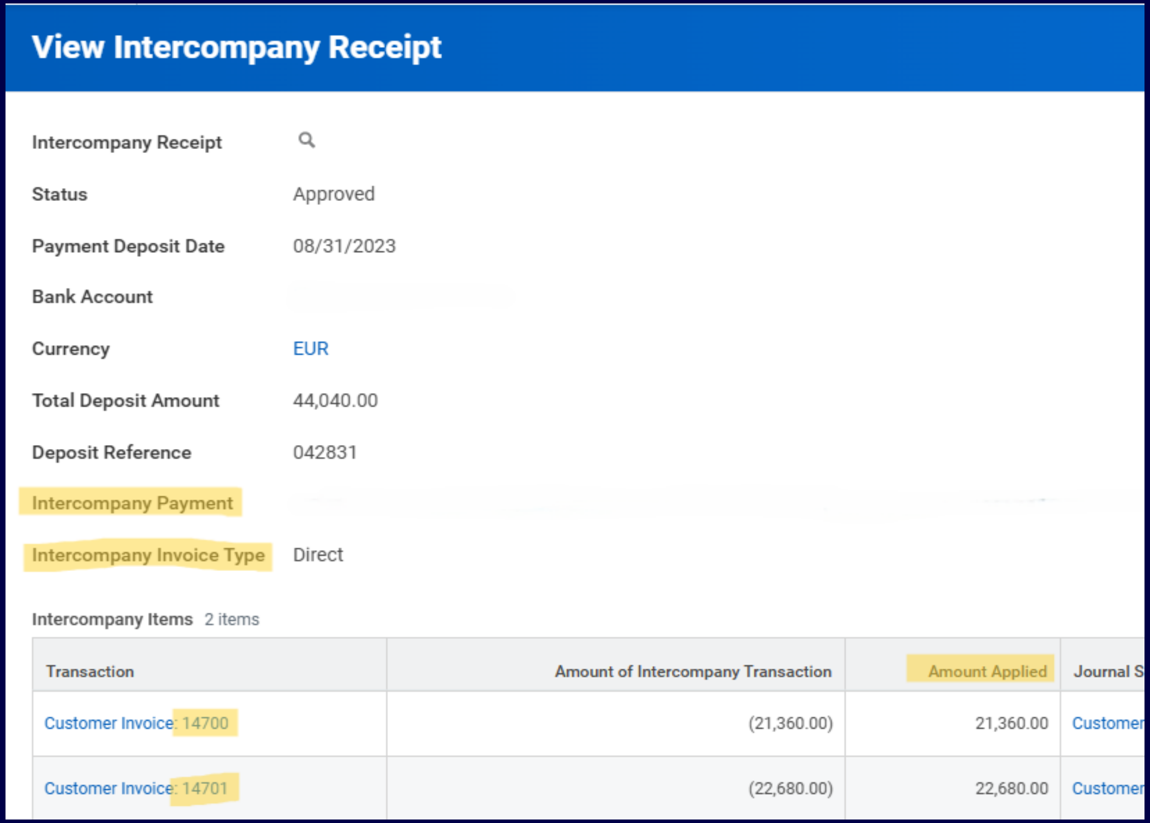
View Intercompany Receipt Fields

Impact analysis

Before the release



After the release



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Customer Refund Reporting

What's changing

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

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

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

Additional considerations

N/A

What do I need to do

- On the Maintain Feature Opt-Ins report, opt in to the Customer Refunds Optimization feature.
- Create and settle refunds for your on-account payments and credit adjustments.
- Create a copy of your standard report and include the new report fields in the report.
- View the customer refund details on your custom report.

What happens if I do nothing

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

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

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Customer Refund Reporting

Additional considerations

Workday delivers a new Approved Customer Refund Payment report field on the Customer Refund business object, which you can use in custom reports to view the most recently approved customer refund payment associated with the refund. The report field is secured to these domains: Process: Customer Refund/Payment Process: Customer Refund Settlement Process: Settlement Workday also delivers these new report fields on the Customer Refund Detail business object (secured to the Public Reporting Items domain) that you can use to view the refund payment details: Refund Document Date Transaction Number Transaction Type

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

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Customer Refund Reporting

Impact analysis

Before the release	After the release
N/A	New customer refund report fields are delivered for Customer Refund business object and Customer Refund Detail business object.

Impact description
This enhancement improves finance efficiency by providing greater visibility into customer refunds activity. It also enables you to easily add customer refund details on your printed checks, eliminating the need for workarounds.

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

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Separate Payments for Customer Refunds in Settlement Runs

What's changing

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

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

- Customer Invoices: this field replaces the Always Separate Payments field and is used for the same purpose.
- Customer Refunds: this is a new field to separate customer refund payments during a settlement run.

.

What do I need to do

- On the Maintain Feature Opt-Ins report, opt in to the Customer Refunds Optimization feature.
- Enable settings to separate payments for customer refunds on a customer or sponsor profile.
- Create a copy of the Find Customers standard report to find customers with Always Separate Refund Payments enabled.
- Create a copy of the Find Sponsors standard report to find sponsors with Always Separate Refund Payments enabled.
- Create customer refunds with the same settlement company, payee, payee remit-to address, payment type, currency, and bank account.
- Settle the customer refunds.

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

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Separate Payments for Customer Refunds in Settlement Runs, cont.

What's Changing

This new Separate Payments section is only visible when Customer Refunds 2.0 has been enabled.

If you enter text in the Memo field on the Create Customer Invoice task, the memo text will continue to appear in the remittance of a single refund payment.

Additional Considerations

Workday now adds a new Customer Refunds check box in a new Separate Payments section for your customers and sponsors. Workday also renames the existing Always Separate Payments check box to Customer Invoices and move it to the Separate Payments section on the customer and sponsor profile.

What happens if I do nothing

- If you choose not to opt in to the customer refunds optimization feature, you can't uptake this enhancement.
- If you don't select to separate the customer refunds, Workday continues to group refund documents with the same settlement company, payee, payee remit-to address, payment type, currency, and bank account into 1 refund payment.

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

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Separate Payments for Customer Refunds in Settlement Runs, cont.

Additional Considerations

You can access these check boxes from the:

- Create Customer or Create Sponsor tasks.
- Edit option on the Payment Details tab on the customer or sponsor profile.
- Change Customer Payment Details task from the related actions menu on the customer profile.

Edit Payment Details task from the related actions menu on the sponsor profile.

- Customer review and revise business processes.
- Customer Payment Change review and revise business processes.

When you select the Customer Refunds check box for a customer or sponsor, Workday creates separate payments for the customer refunds in a settlement run.

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

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Separate Payments for Customer Refunds in Settlement Runs, cont.

Additional Considerations

When you don’t select the check box, Workday continues to group payments for the customer refunds for the same:

- Bank account.
- Company.
- Currency.
- Payee.
- Payee remit-to address.
- Payment type.

Workday updates the customer refund settlement to now process approved customer refund payments separately for the same settlement company, payee, payee remit-to address, payment type, currency, and bank account when the payee’s profile is configured to separate payments for refunds.

In the settlement run, you can view the:

- Customer refund count in the Payment Information section.

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

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Separate Payments for Customer Refunds in Settlement Runs, cont.

Additional Considerations

Customer refund payment details on the Customer Refund Payments tab. Workday delivers a new Always Separate Refund Payments report field on the Customer business object (secured to the Public Reporting Items domain) that you can use in custom reports to view customers or sponsors that have separate payments for the refunds configured. Workday also updated these web services to now support the Always Separate Refund Payments option:

- Get Customers
- Get Sponsors
- Put Sponsor
- Submit Customer

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

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Setup required

Separate Payments for Customer Refunds in Settlement Runs

Impact analysis

Before the release	After the release
Workday groups refund documents with the same settlement company, payee, payee remit-to address, payment type, currency, and bank account into 1 refund payment.	If Separate Payment is opted for a customer, then separate line items will be generated for each customer refund even if settlement company, payee, payee remit-to address, payment type, currency, and bank account are same.

Impact description
This enhancement provides a more consistent user experience and improves finance efficiency by streamlining manual tasks and eliminating the need for workarounds.

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

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Setup required

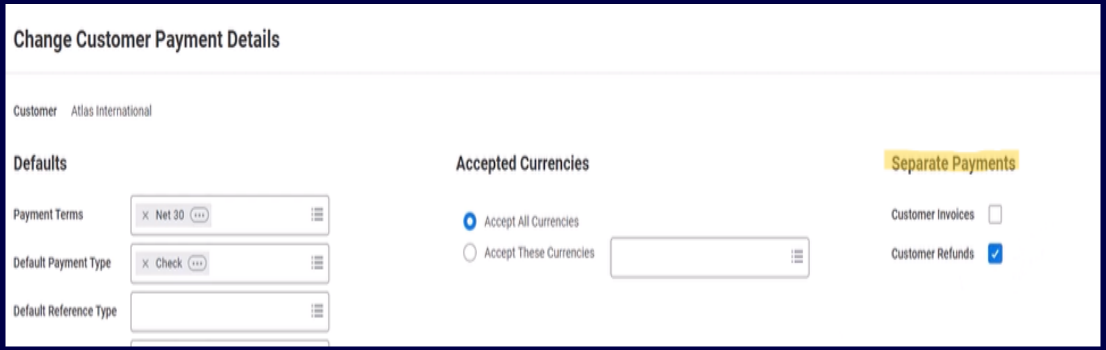
Separate Payments for Customer Refunds in Settlement Runs

Impact analysis

Before the release

N/A

After the release



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Setup required

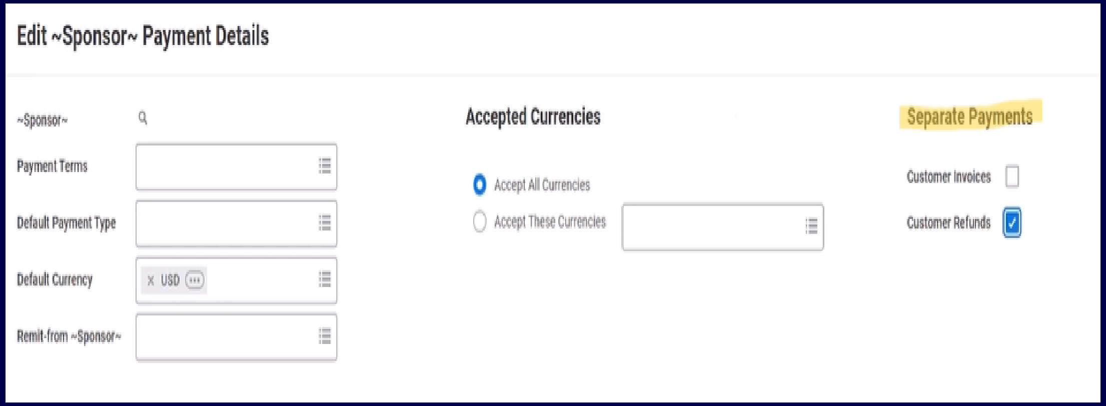
Separate Payments for Customer Refunds in Settlement Runs, cont.

Impact analysis

Before the release

N/A

After the release



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Expenses

Back to table of contents

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Setup required

Visa Level 3 Hotel Data for Expense Credit Cards

What’s changing

Workday add these new fields to the Visa Commercial Format 4.4 (VCF 4) scrubbed integration template: Charge Date, Check In Date, Checkout Date, Commodity Code, Daily Room Rate, Health Club Charges, If Purchase ID, Line Sub Total, Merchant Service Description , No Show Indicator , Prepaid Expenses Amount , Sequence Number, Source Amount ,Total Business Center Charges, Total Charges Amount , Total Folio Cash Advances , Total Food/Beverage Charges, Total Gift Shop Purchases , Total Laundry Charges , Total Mini-bar Charges , Total Movie charges. Workday also add new Visa Product Codes that you can use in Itemization Mapping. If your organization uses more than one network, you can map both Visa and MasterCard product codes to the same expense item.

What do I need to do

Visa Commercial Data Solutions provides enhanced data procured through several sources such as acquirers, GDS, TMCs and Hotels. If you’re not already enrolled, ensure the financial institution you work with subscribes your corporate
card program for enhanced data via Visa Commercial Solutions Experience portal. Before you use this functionality:

- Contact your financial institution to request enhanced level 3 credit card transaction data for hotel stays.
- Map merchant category codes to your expense items. Then:
  - Select the Automatically Populate Itemization for Level 3 Credit Card Transaction Data check box on your hotel expense items.
  - Map expense items to the relevant Visa product codes. If you don't map to product codes,.

https://doc.workday.com/release-notes/en-us/finexp/8647155.html

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Visa Level 3 Hotel Data for Expense Credit Cards, cont.

What's changing

Workday enables you to sort and search product codes if you've selected the Automatically Populate Itemization for Level 3 Credit Card Transaction Data check box.
Workday displays a new icon on expense report lines for transactions with Visa level 3 hotel data. Note: Workday doesn't automatically generate itemization lines when you use these web services to create expense reports that include level 3 credit card transaction data:

- Submit Expense Report for Applicant
- Submit Expense Report for Non-Worker
- Submit Expense Report for Worker

However, you can still use these web services to enter data and create itemization lines.

What do I need to do

Workday still automatically creates expense line but Workday don't automatically populate the lines with expense item you do map to product codes, Workday automatically generates expense report lines and automatically populates the lines with mapped expense items.
You need to manually populate itemization data when you don't have level 3 credit card transaction data, or when you manually create an expense.
For added efficiency, Workday recommend enabling expense item defaulting.

What happens if I do nothing

If you already subscribe to enhanced visa level 3 data, you can report on this data to analyze your hotel spend.

https://doc.workday.com/release-notes/en-us/finexp/8647155.html

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Visa Level 3 Hotel Data for Expense Credit Cards, cont.

Additional Considerations

Workday adds these new fields to the Visa Commercial Format 4.4 (VCF 4) scrubbed integration template:

- Charge Date
- Check In Date
- Checkout Date
- Commodity Code
- Daily Room Rate
- Health Club Charges
- If Purchase ID
- Line Item Sub Total
- Merchant Service Description
- No Show Indicator

https://doc.workday.com/release-notes/en-us/finexp/8647155.html

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Visa Level 3 Hotel Data for Expense Credit Cards, cont.

Additional Considerations

- Prepaid Expenses Amount
- Total Charges Amount
    - Total Folio Cash Advances
    - Total Food/Beverage Charges
    - Total Gift Shop Purchases
    - Total Laundry Charges
    - Total Mini-bar Charges
    - Total Movie charges
    - Total Non-Room Charges
    - Total Room Tax Amount
    - Total Tax Amount
    - Total Telephone Charges
    - Total Valet Parking Charges

https://doc.workday.com/release-notes/en-us/finexp/8647155.html

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Visa Level 3 Hotel Data for Expense Credit Cards, cont.

Additional Considerations

Workday also add new Visa Product Codes that you can use in Itemization Mapping.

If your organization uses more than one network, you can map both Visa and MasterCard product codes to the same expense item.

Workday enables you to sort and search product codes if you've selected the Automatically Populate Itemization for Level 3 Credit Card Transaction Data check box.

Workday displays a new icon on expense report lines for transactions with Visa level 3 hotel data.

https://doc.workday.com/release-notes/en-us/finexp/8647155.html

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Visa Level 3 Hotel Data for Expense Credit Cards, cont.

Additional Considerations

Note: Workday doesn't automatically generate itemization lines when you use these web services to create expense reports that include level 3 credit card transaction data:

- Submit Expense Report for Applicant
- Submit Expense Report for Non-Worker
- Submit Expense Report for Worker

However, you can still use these web services to enter data and create itemization lines.

https://doc.workday.com/release-notes/en-us/finexp/8647155.html

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Visa Level 3 Hotel Data for Expense Credit Cards

Impact analysis

Before the release	After the release
View and report on level 3 hotel data from Mastercard credit card transaction. You can now use Mastercard level 3 hotel credit card transaction data to automatically populate itemization lines on hotel expenses.	View and report on level 3 hotel data from Visa credit card transactions and Mastercard credit card transaction. You can also now use Visa level 3 hotel credit card transaction data along with MasterCard data to automatically populate itemization lines on hotel expenses.

Impact description
You can also now use Visa level 3 hotel credit card transaction data to automatically populate itemization lines on hotel expenses.

[https://doc.workday.com/release-notes/en-us/finexp/8647155.html
y]

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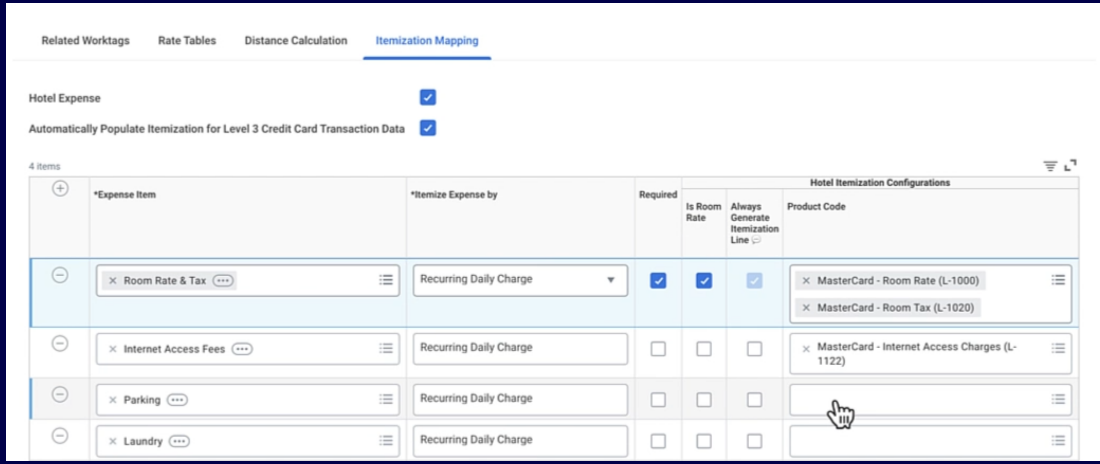
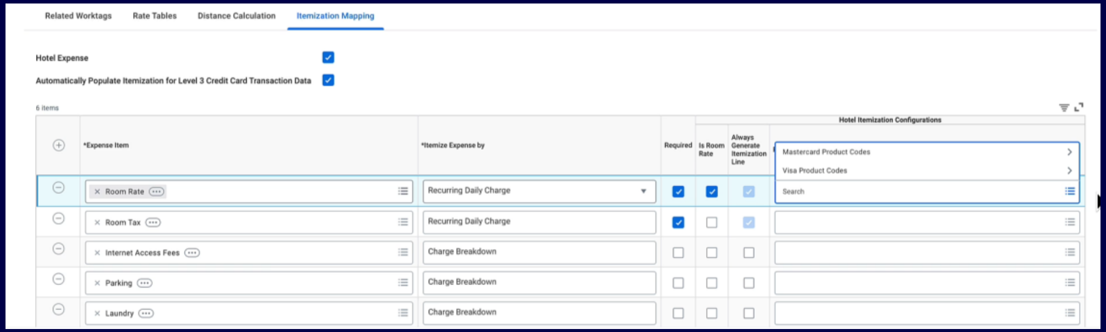
Visa Level 3 Hotel Data for Expense Credit Cards

Impact analysis

Before the release



After the release



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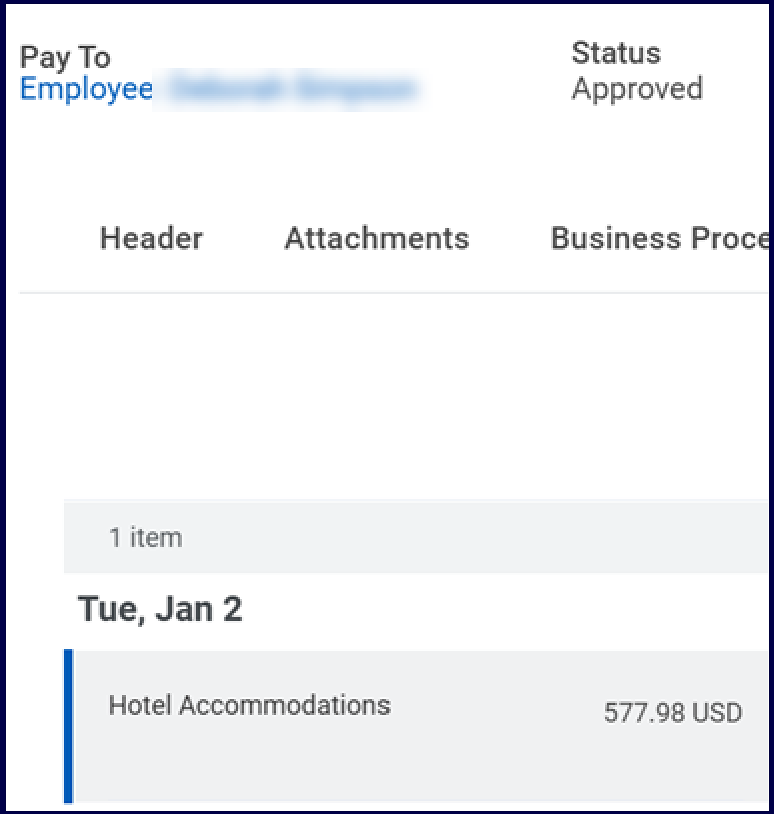
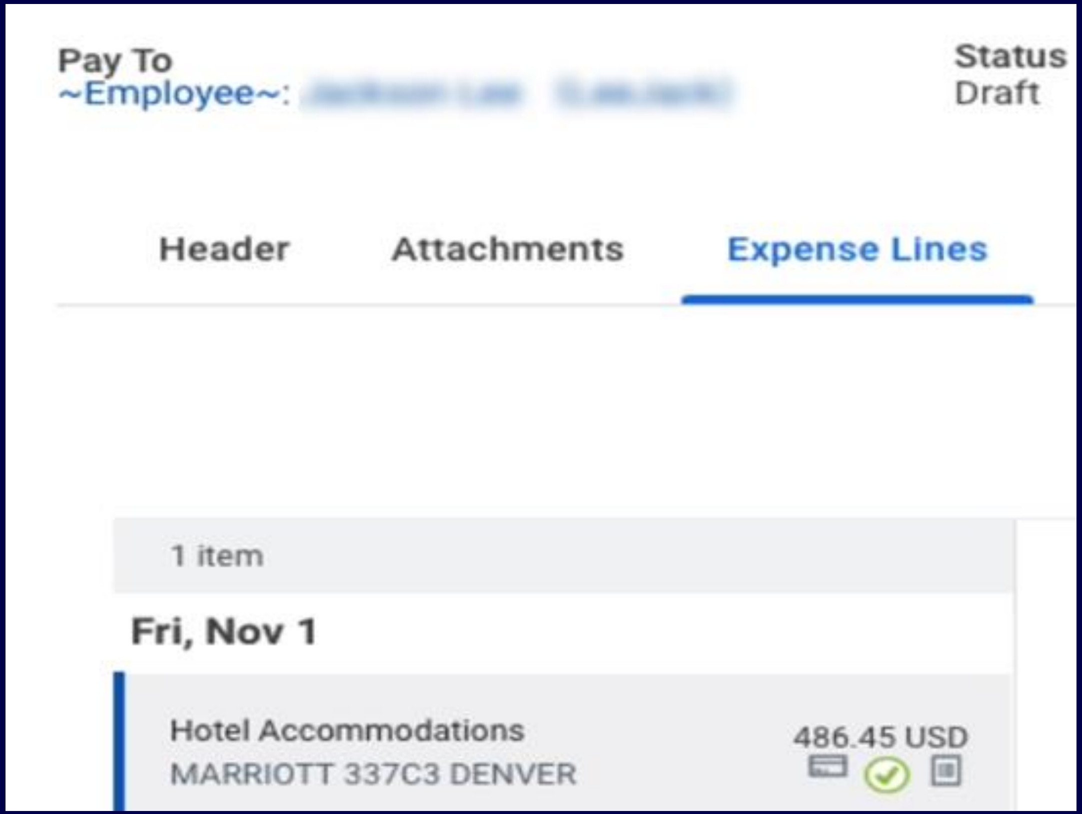
Visa Level 3 Hotel Data for Expense Credit Cards

Impact analysis

Before the release



After the release



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Enhanced Security for Credit Card Accounts, Files, and Transactions

What's changing

Workday enhance security for credit card-related domains to provide greater control over data that's related to corporate credit card billing accounts, credit cards, credit card transactions, and files.

This feature impacts all areas of Workday that use expense credit cards, credit card transactions, and billing accounts.

What do I need to do

To opt in to this feature:

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

Use the Security Exception Audit report to find and fix security issues and identify security groups that are no longer permitted on the impacted domains.

Workday recommend that you evaluate your security groups on the impacted domains and ensure user groups are provided the appropriate security access.

To remove invalid security groups:

- Access the Security Exception Audit report.
- Select the Domain Security Policy that has invalid security groups.
- Click Edit Permission.
- Remove invalid security groups.

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

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Enhanced Security for Credit Card Accounts, Files, and Transactions, cont.

Additional Considerations

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

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

Workday automatically copies over all security groups for the new Process: Credit Card Files domain. You can only make changes to your domain policy after you remove any invalid security groups from the policy.

Workday also updates these existing domains to provide security group restrictions by supporting Roles - Company and unconstrained security groups. The domain secure tasks, reports, data sources, and web services related to corporate credit card billing account, credit cards and credit card transactions.

What do I need to do

- Click OK and Done.
- Access the Activate Pending Security Policy Changes task.
- Describe your changes in the Comment field.
- Select the Confirm check box to activate your changes.

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

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Enhanced Security for Credit Card Accounts, Files, and Transactions, cont.

Additional Considerations

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

- Unconstrained security.
- A role in a company associated with the credit card billing account.
- A role in a company associated with the expense report containing the transaction.
- A role in an organization associated with central travel card transactions.

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

What happens if I do nothing

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

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

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Enhanced Security for Credit Card Accounts, Files, and Transactions, cont.

Additional Considerations

As part of this enhancement, Workday enable you to add a company to a billing account, even if the account already has transactions, provided the account didn't previously have an associated company. Workday only allows you to make this change once. Regardless of whether you opt in or not, integration system users with constrained access can no longer run the Import Credit Card and Import Credit Card Transactions web services for billing accounts without a company.

In preparation for future retirement, Workday append (DO NOT USE) to these report fields and replace them with report fields of the same name:

- Company.
- Company of Expensing ~Worker~ .
- Credit Card for Credit Card Transaction.

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

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Enhanced Security for Credit Card Accounts, Files, and Transactions, cont.

Additional Considerations

- Corporate Credit Card Account.
- Corporate Credit Card Accounts.
- Organization.

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

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

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

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

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Setup required

Enhanced Security for Credit Card Accounts, Files, and Transactions

Impact analysis

Before the release	After the release
Domain : Credit Card, supported all type of security group.	New domain will secure Credit Card transaction files and related tasks and reports. Only unconstrained security groups are supported

Impact description
Workday delivers a new Process : Credit Card Files domain that secures tasks, reports, data sources and web services related to Credit card transaction files.

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

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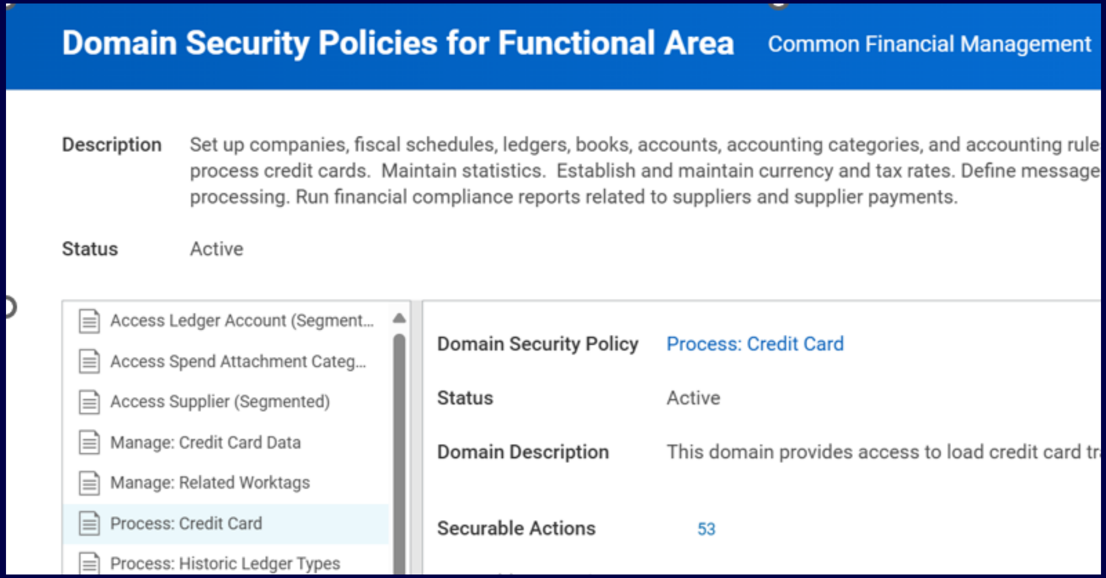
Setup required

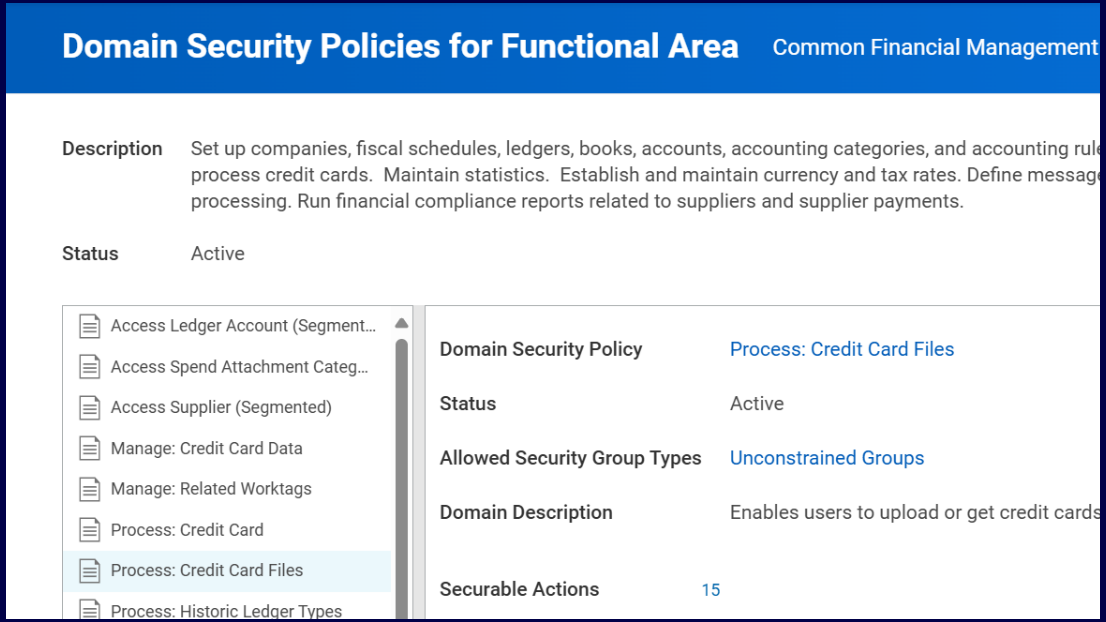
Enhanced Security for Credit Card Accounts, Files, and Transactions

Impact analysis

Before the release



After the release



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Extend

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Graph API Validate-Only Header

What's Changing

Workday updates Workday Graph API, enabling you to submit mutations in validate-only mode.

Additional Considerations

When you set the HTTP header x-validate-only to 1, Graph API only validates the request and doesn't update the tenant data. The Graph API response adds an extensions object with the validateOnly property containing the isSuccess field, which indicates the validation result.

What do I need to do

When you want to submit a mutation in validate-only mode, specify this HTTP header with your Graph API request:

x-validate-only: 1

What happens if I do nothing

By default, Graph API mutations save the tenant data as specified in the request.

Graph API Validate-Only Header

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Graph API Validate-Only Header

Impact analysis

Before the release	After the release
The request cannot be validated before updating data in Workday	The request can be validated before updating data in Workday

Impact description
The validate-only mode enables you to reduce the required corrections and protect data integrity when updating data with Graph API.

Graph API Validate-Only Header

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Graph API Validate-Only Header

Impact analysis

Before the release


```json
{
  "data": {
    "createExpenseReport": null
  },
  "errors": [
    {
      "message": "INVALID DATE during parsing. !**!!**! field: '!**!'. Cause:
com.workday.oms.utils.FastDateException: INVALID DATE during parsing. !**!!**! field: '!**!'",
      "path": [
        "createExpenseReport"
      ],
      "locations": [
        {
          "line": 2,
          "column": 3
        }
      ],
      "extensions": {
        "code": "S5",
        "field": "creationDate",
        "path": [
          "creationDate"
        ],
        "statusCode": 400
      }
    }
  ]
}
```


After the release


```json
{
  "data": {
    "createExpenseReport": null
  },
  "errors": [
    {
      "message": "INVALID DATE during parsing. Failed to parse ISO-8601 date",
      "path": [
        "createExpenseReport"
      ],
      "locations": [
        {
          "line": 2,
          "column": 3
        }
      ],
      "extensions": {
        "code": "S5",
        "path": [
          "creationDate"
        ],
        "field": "creationDate",
        "statusCode": 400
      }
    }
  ],
  "extensions": {
    "validateOnly": {
      "isSuccess": false
    }
  }
}
```


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Business Entity Contacts Query in Workday Graph API Schema

Impact analysis

What's Changing

Workday continues to grow the Workday Graph API schema, providing Workday Extend apps access to more business object data using Graph API.

Additional Considerations

Workday delivers the new businessEntityContact query, enabling Extend apps to read Business Entity Contact data using Workday Graph API. To configure the security domains for the new query, access the View Security for Securable Item report in Workday.

What do I need to do

N/A

What happens if I do nothing

N/A

Business Entity Contacts Query in Workday Graph API Schema

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Business Entity Contacts Query in Workday Graph API Schema

Impact analysis

Before the release	After the release
Business Entity Contacts data source is not available for Graph API	Business Entity Contacts data source is available for Graph API

Impact description
The new data source in Graph API enables us to fetch the data from the corresponding Business Object

Business Entity Contacts Query in Workday Graph API Schema

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Business Entity Contacts Query in Workday Graph API Schema

Impact analysis

Before the release

N/A

After the release

```
query businessEntityContact($businessEntityContact_dataSource: BusinessEntityContact_DataSources!) {
  businessEntityContact(dataSource: $businessEntityContact_dataSource) {
    data {
      businessEntity {
        workdayID {
          id
        }
        descriptor
      }
      businessEntityContact {
        workdayID {
          id
        }
        descriptor
      }
      contactCountry
      contactType {
        total
      }
      defaultEmailAddress1
      defaultPhoneNumber
      descriptor
```

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Financial Management

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Put Worktags Tax Rule SOAP Web Service

What's changing

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

Additional considerations

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

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

Workday also delivers new validations on the Put Worktags Tax Rule web service to support the new option.

What do I need to do

N/A

What happens if I do nothing

N/A

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

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Put Worktags Tax Rule SOAP Web Service, cont.

Additional considerations

See the SOAP API Change Log link under Related Information.

This update enables you to partially update worktag transaction tax rules, without the need to populate all lines, saving you time and improving performance.

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

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Put Worktags Tax Rule SOAP Web Service

Impact analysis

Before the release	After the release
Before this update there no webservice is available to update worktags on the tax rules.	With this update Put Worktags Tax Rule web service in v44.0 to now enable you to add or update specific lines for worktag transaction tax rules without reloading all of your unchanged lines.

Impact description
This update enables you to partially update worktag transaction tax rules, without the need to populate all lines, saving you time and improving performance.

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

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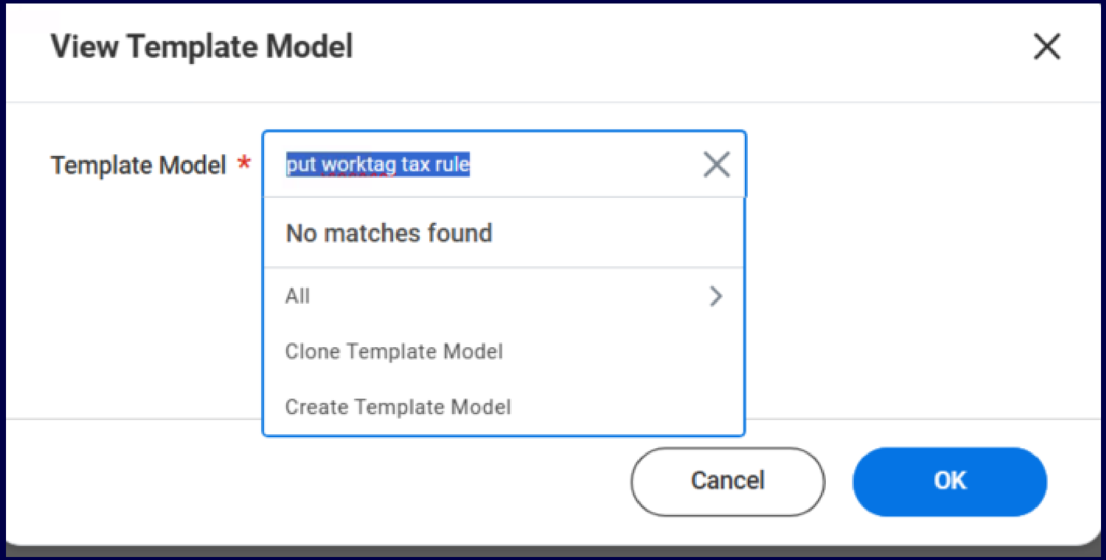
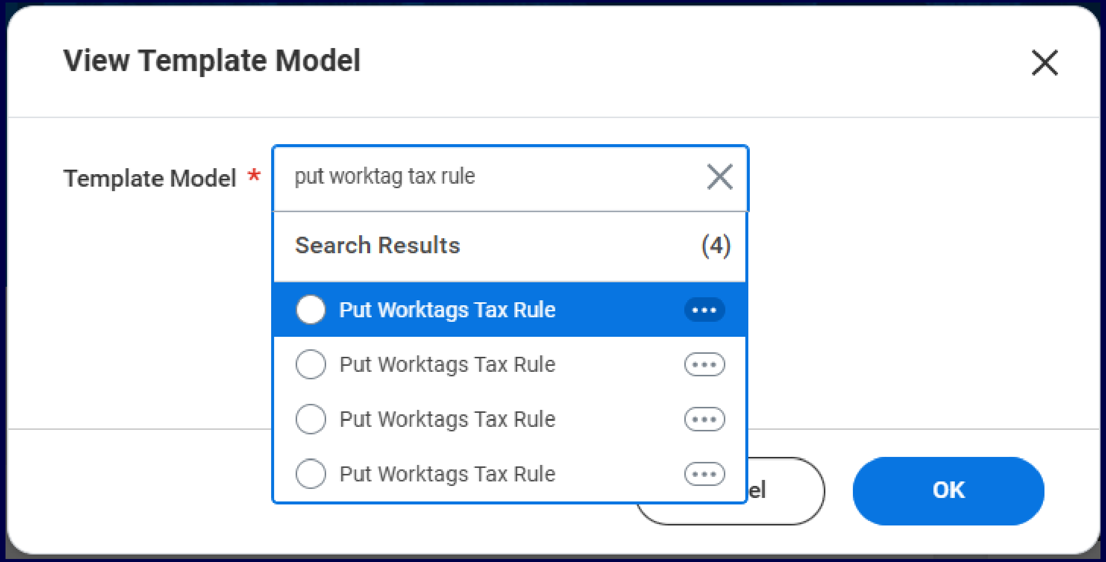
Put Worktags Tax Rule SOAP Web Service

Impact analysis

Before the release



After the release



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Tax Accounting for Customer Invoice Adjustments

What's changing

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

Additional considerations

Workday updating our processing logic so that when you apply adjustments to decrease the amount due from a customer on customer invoices with balancing worktags and VAT on payment enabled, Workday now reverses tax accounting entries on customer invoice application journals. Standard and custom reports on the Payment Tax Rate Application business object now also return rows for the customer invoice and for the customer invoice adjustment.

What do I need to do

N/A

What happens if I do nothing

N/A

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

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Tax Accounting for Customer Invoice Adjustments

Impact analysis

Before the release	After the release
Before this release no reversal on tax amounts for customer adjustment lines	Now Workday can see journal lines to reverse tax amounts

Impact description
This update increases the accuracy of your accounting and reporting.

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

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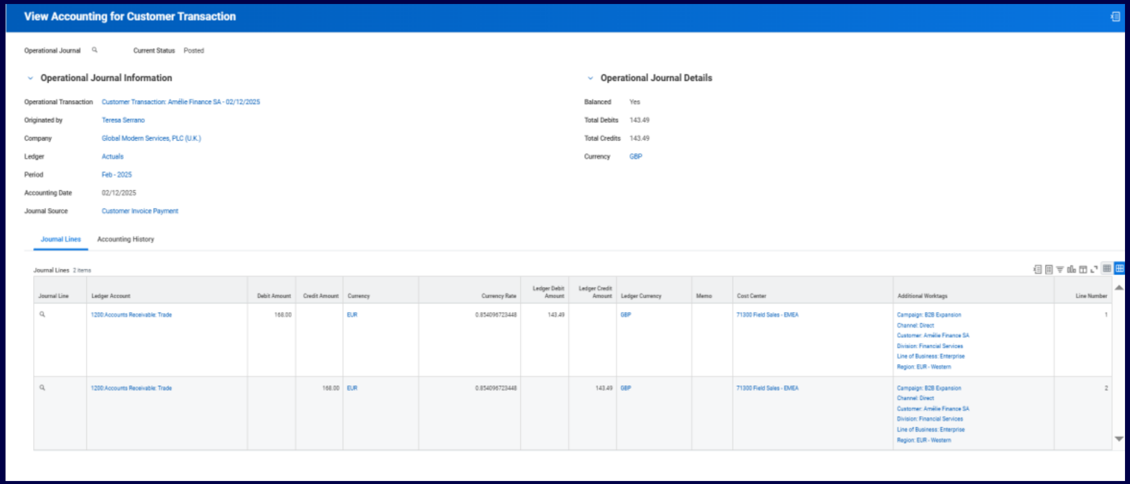
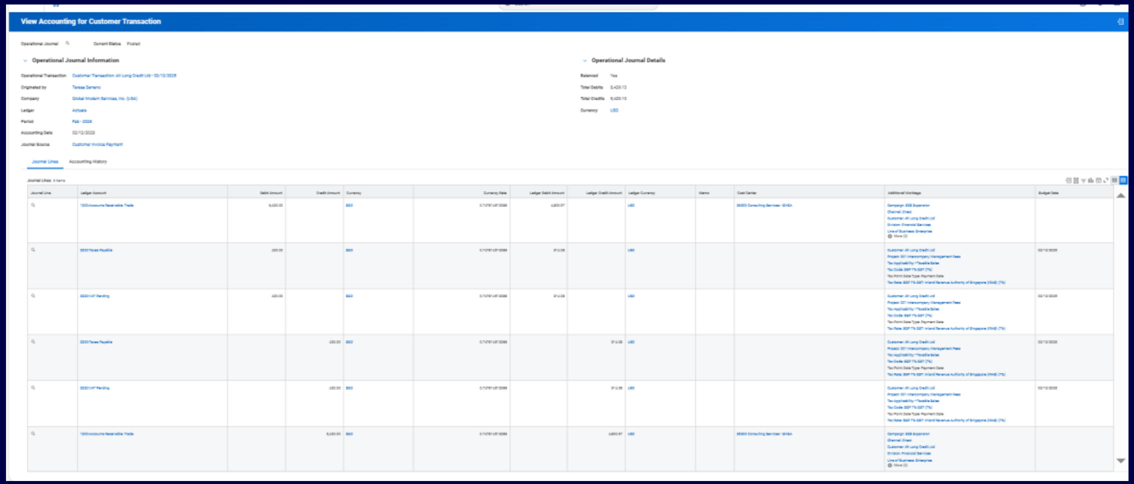
Tax Accounting for Customer Invoice Adjustments

Impact analysis

Before the release



After the release



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Worktags for Expense Journal Lines

What’s changing

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

- Tax Applicability
- Tax Code

Additional considerations

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

- Tax Applicability
- Tax Code

What do I need to do

N/A

What happens if I do nothing

N/A

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

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Worktags for Expense Journal Lines

Impact analysis

Before the release	After the release
Before this release tax code, tax applicability doesn’t pick on spend journal lines	With this update now Workday can see tax worktags on the spend journal line that was generated for the expense report line.

Impact description
Tax Accountants can now see tax worktags on the spend journal line that was generated for the expense report line.

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

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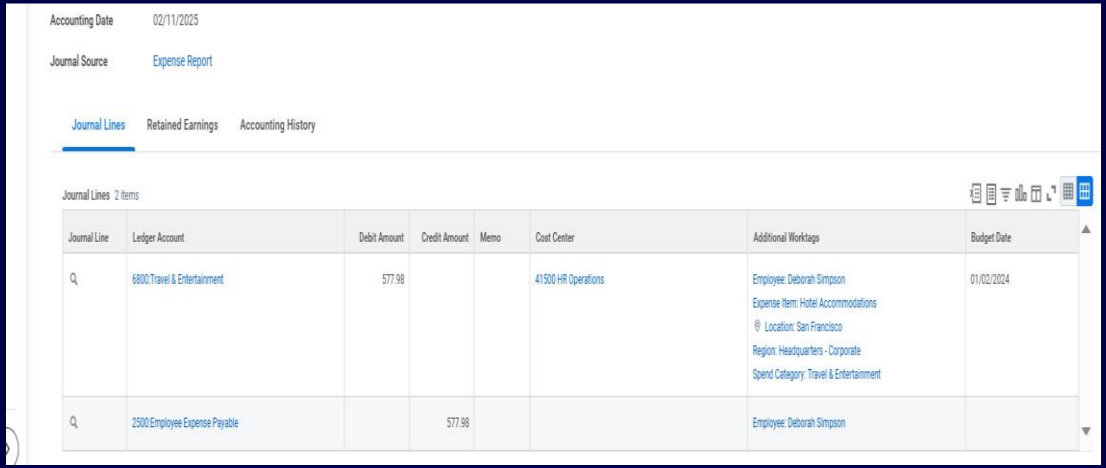
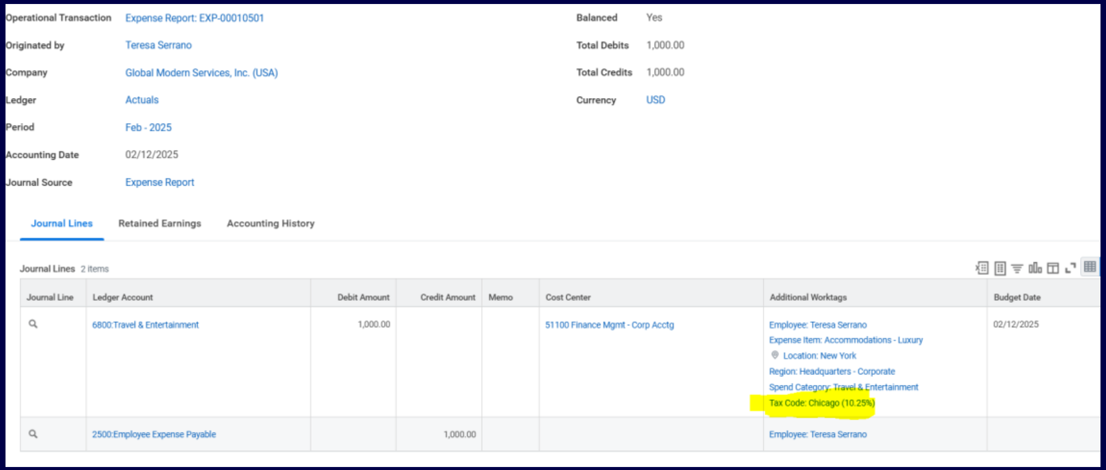
Worktags for Expense Journal Lines

Impact analysis

Before the release



After the release



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Write Off Customer Invoices with VAT on Payment

What's changing

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

Additional considerations

Workday updates our processing logic to now automatically recalculate tax amounts when you write off customer invoices with balancing worktags and VAT on payment enabled. You can now view the tax journal lines when you access the View Accounting for Customer Transaction task from the customer invoice write-off.

What do I need to do

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

What happens if I do nothing

N/A

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

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Write Off Customer Invoices with VAT on Payment

Impact analysis

Before the release	After the release
Before this release customer write-off process was not automatically reversing tax when write off customer invoices	With this enhancement customer write-off process by now automatically reversing tax when you write off customer invoices with balancing worktags and value-added tax (VAT) on payment enabled.

Impact description
This update eliminates the need to create manual journals to reverse tax when you write off customer invoices with balancing worktags and VAT on payment enabled, saving you time and reducing the risk of data entry errors.

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

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Write Off Customer Invoices with VAT on Payment

Impact analysis

Before the release

Journal Source: Customer Invoice Writeoff

Journal Lines | Retained Earnings | Accounting History

Journal Lines 2 items

Journal Line	Ledger Account	Debit Amount	Credit Amount	Currency	Currency Rate	Ledger Debit Amount	Ledger Credit Amount	Ledger Currency	Memo	Cost Center	Additional Worktags	Budget Date
	7800:Bad Debt	1,000.00		SGD	0.747814512088	747.81		USD		36300 Consulting Services - EMEA	Channel: Direct Customer: Ah Long Credit Ltd Division: Financial Services Project: 001 Intercompany Management Fees Receivable Writeoff Reason: Bad Debt Region: APS - SouthEast Asia	02/12/2025
	1200:Accounts Receivable: Trade		1,000.00	SGD	0.747814512088		747.81	USD		36300 Consulting Services - EMEA	Campaign: B2B Expansion Channel: Direct Customer: Ah Long Credit Ltd Division: Financial Services Line of Business: Enterprise More (2)	

After the release

Accounting Date: 02/12/2025

Journal Source: Customer Invoice Writeoff

Journal Lines | Retained Earnings | Accounting History

Journal Lines 3 items

Journal Line	Ledger Account	Debit Amount	Credit Amount	Currency	Currency Rate	Ledger Debit Amount	Ledger Credit Amount	Ledger Currency	Memo	Cost Center	Additional Worktags	Budget Date
	7800:Bad Debt	1,000.00		SGD	0.747814512088	747.81		USD		36300 Consulting Services - EMEA	Channel: Direct Customer: Ah Long Credit Ltd Division: Financial Services Project: 001 Intercompany Management Fees Receivable Writeoff Reason: Bad Debt Region: APS - SouthEast Asia	02/12/2025
	2220:VAT Pending	70.00		SGD	0.747814512088	52.35		USD			Customer: Ah Long Credit Ltd Project: 001 Intercompany Management Fees Tax Applicability: *Taxable Sales Tax Code: SGP 7% GST (7%) Tax Point Date Type: Payment Date Tax Rate: SGP 7% GST: Inland Revenue Authority of Singapore (IRAS) (7%)	02/12/2025
	1200:Accounts Receivable: Trade		1,070.00	SGD	0.747814512088		800.16	USD		36300 Consulting Services - EMEA	Campaign: B2B Expansion Channel: Direct Customer: Ah Long Credit Ltd Division: Financial Services Line of Business: Enterprise More (2)	

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Business Entity Contacts Query in Workday Graph API Schema

What's changing

Workday continues to grow the Workday Graph API schema, providing Workday Extend apps access to more business object data using Graph API.

What do I need to do

N/A

Additional considerations

Workday delivers the new businessEntityContact query, enabling Extend apps to read Business Entity Contact data using Workday Graph API. To configure the security domains for the new query, access the View Security for Securable Item report in Workday.

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/fincore/8405275.html

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Business Entity Contacts Query in Workday Graph API Schema

Impact analysis

Before the release	After the release
N/A	With this enhancement Extend apps can access more comprehensive data using Graph API

Impact description
Extend apps can access more comprehensive data using Graph API.

https://doc.workday.com/release-notes/en-us/fincore/8405275.html

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Accounting Journal Scalability and Performance

What's changing

Workday continues to deliver accounting journal scalability and performance updates

Additional considerations

Workday updates the processing of the Unpost-Reverse Accounting Journal web service, enabling you to potentially experience faster run times when you use this web service to unpost or reverse journals with more than 500 journal lines.

What do I need to do

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

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/fincore/8405275.html

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Accounting Journal Scalability and Performance

Impact analysis

Before the release	After the release
Clients had reported issues when processing the Unpost-Reverse Accounting Journal web service with a few hundred lines. The processing tends to be a bit slow and unresponsive sometimes.	Workday has now updated the processing of the Unpost-Reverse Accounting Journal web service, enabling you to potentially experience faster run times when you use this web service to unpost or reverse journals with more than 500 journal lines.

Impact description
Workday has now updated the processing of the Unpost-Reverse Accounting Journal web service, enabling you to potentially experience faster run times when you use this web service to unpost or reverse journals with more than 500 journal lines.

https://doc.workday.com/release-notes/en-us/fincore/8058825.html

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View Journal Lines

What's changing

Workday provides a new journal line drill down and related action on operational and accounting journal entries.

Additional considerations

Workday delivers a new Journal Line column on the View Journal report for these journals:

- Accounting Center Summary Journals
- Accounting Journals
- Operational Journals
- Summary Journals

Workday also:

- Displays a new Journal Line preview window that you can access from the related actions menu of the journal line.

What do I need to do

N/A

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/fincore/8724353.html

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View Journal Lines, cont.

Additional considerations

- Enables you to drill down on journal lines when you view custom reports that use the Journal Line report field.
- Delivers a new View Journal Line report (secured to the Core Navigation domain) that displays both header and line information.

Note: To access the new View Journal Line report or perform related actions on the journal line, you must have security permissions to the journal company as well as access to the ledger account on the journal line when Ledger Account Segmented Security is configured. In addition to these contextual security requirements, Workday also requires access to at least 1 of these domains:

- Process: Journals – View
- Process: Journals – Reporting
- Reports: Organization Journals Reporting

https://doc.workday.com/release-notes/en-us/fincore/8724353.html

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View Journal Lines

Impact analysis

Before the release	After the release
Journal line drill down and column was not available	New Journal line column available to drill down

Impact description
Workday provides a new journal line drill down and related action on operational and accounting journal entries.

https://doc.workday.com/release-notes/en-us/fincore/8724353.html

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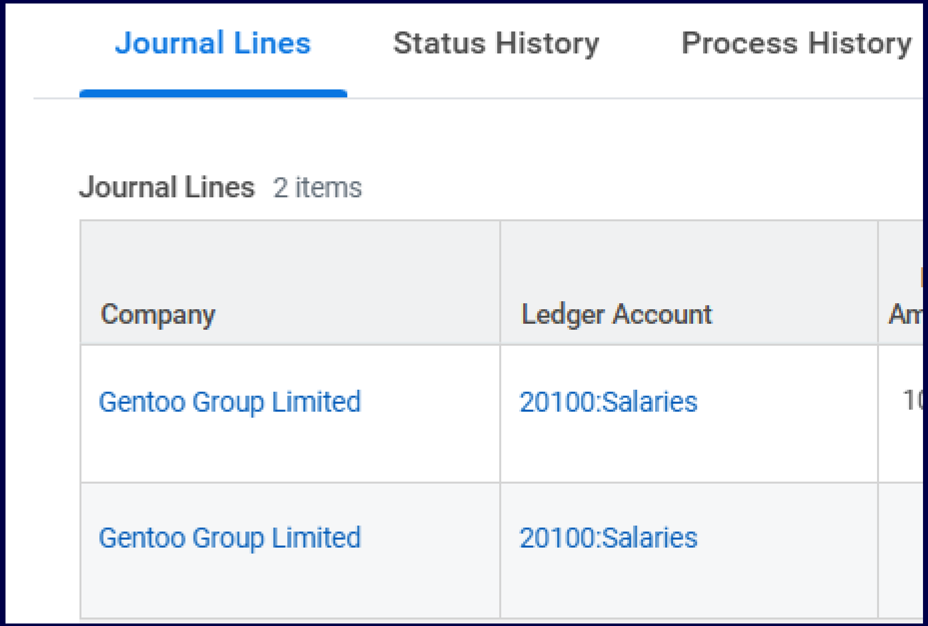
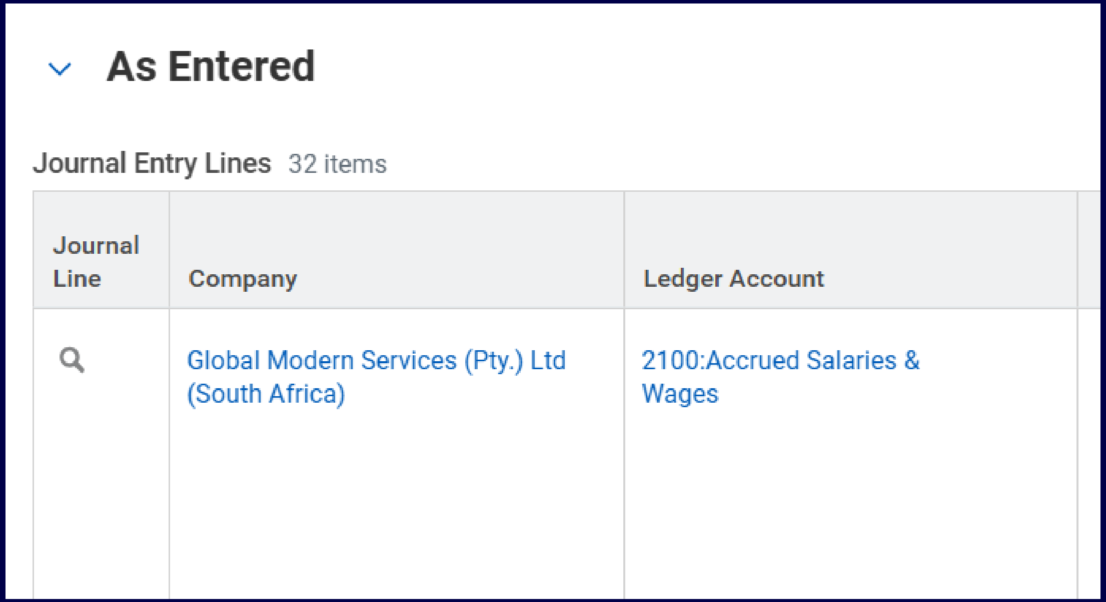
View Journal Lines

Impact analysis

Before the release



After the release



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Address Tax ID Update

What's changing

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

- France
- Mexico
- Philippines

Additional considerations

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

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

Enable Tax Details by Address: You can now configure tax details by address for these tax ID types:

- RFC
- TIN
- SIRET

What do I need to do

N/A

What happens if I do nothing

N/A

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Address Tax ID Update

Impact analysis

Before the release	After the release
Earlier this option was not available	Now you have the option to add tax details at address levels for the following countries: • France • Mexico • Philippines

Impact description
You can use this feature to add tax ID and more detailed transaction tax status information to help you comply with tax regulations for France, Mexico, and Philippines.

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

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Revaluation Enhancements

What's changing

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

What do I need to do

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

Additional considerations

Workday updates the Run Revaluation business process to be more resilient when generating larger volumes of resulting lines. You may now see child processes when viewing your business process event. Workday no longer generates events for revaluation results with zero lines. Workday still creates events for revaluation results generated before the delivery of this feature.

What happens if I do nothing

N/A

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

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Revaluation Enhancements

Impact analysis

Before the release	After the release
Workday had the old Run Revaluations business process.	Workday updates the Run Revaluations business process to address resiliency and usability.

Impact description
These enhancements help provide a more streamlined and resilient user experience when calculating currency revaluations.

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

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View Reporting Model Configuration History Report

What's changing

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

What do I need to do

Nothing. The report is available by default in Workday.

Additional considerations

You can use the Reporting Model Configuration History report to track any changes to the reporting model members including: • Company • Ledger Accounts • Time • Currency • Versions • Effective Date • Dimensions • Show Details.

What happens if I do nothing

Nothing happens.

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

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Automatically Available

View Reporting Model Configuration History Report

Impact analysis

Before the release	After the release
N/A	A new View Reporting Model Configuration History report enabling you to track configuration changes to the reporting model. This report is available to only OfficeConnect for Financial Management.

Impact description
The report enables you to track any changes to the reporting model configuration.

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

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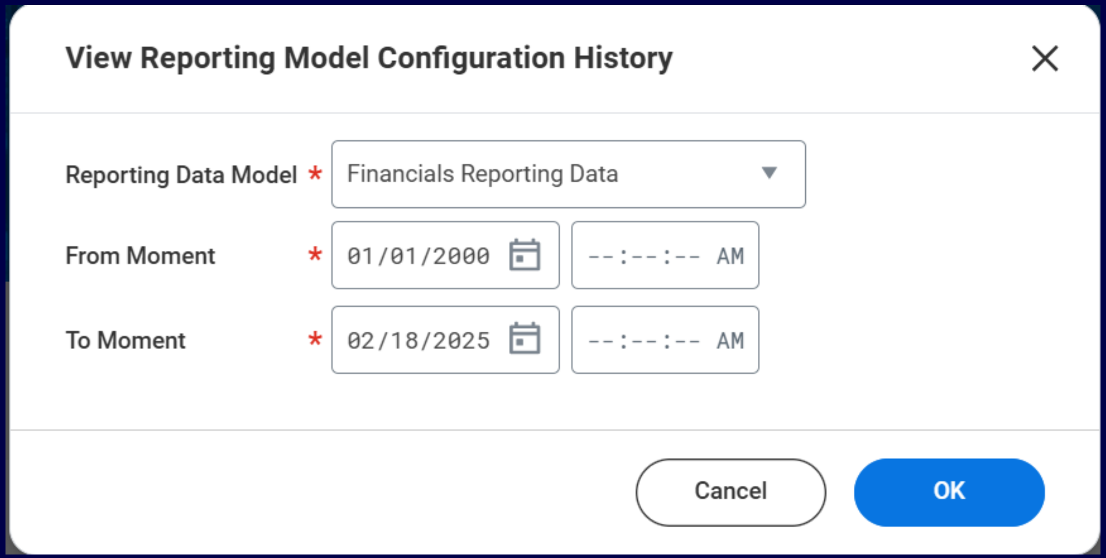
View Reporting Model Configuration History Report

Impact analysis

Before the release

- N/A

After the release



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

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Historical Data in the Reporting Model

What's changing

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

What do I need to do

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

Additional considerations

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

What happens if I do nothing

Nothing happens.

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

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Historical Data in the Reporting Model

Impact analysis

Before the release	After the release
N/A	You can now report on 5 years of historical data (3 more than previously) in OfficeConnect for Financial Management.

Impact description
N/A

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

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Central Place for Managing Reporting Models

What's changing

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

Additional considerations

Workday provides a new Manage Reporting Models page that enables you to:

- Set your default reporting model.
- Create, edit, copy, or delete a reporting model.
- View individual model metrics.

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

What do I need to do

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

What happens if I do nothing

Nothing happens.

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

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Automatically available

Central Place for Managing Reporting Models

Impact analysis

Before the release	After the release
N/A	Workday provides a new Manage Reporting Models page that enables you to: Set your default reporting model. Create, edit, copy, or delete a reporting model. View individual model metrics. To edit, copy, delete, or set a default reporting model, you must first click OK on the Manage Reporting Models page. Then, use the related actions menu next to each reporting data model name.

Impact description
N/A

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

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Automatically available

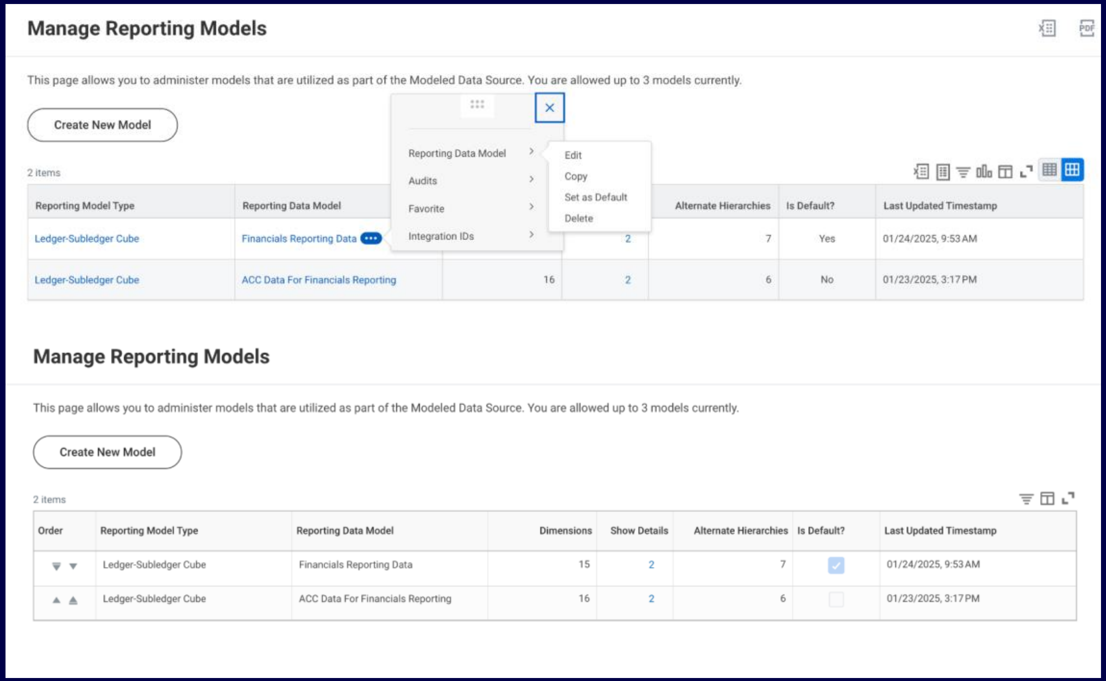
Central Place for Managing Reporting Models

Impact analysis

Before the release

- N/A

After the release



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Automatically available

Reporting Model Size Limit

What's changing

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

Additional considerations

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

What do I need to do

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

What happens if I do nothing

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

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

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

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Automatically available

Reporting Model Size Limit

Impact analysis

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

Impact description
N/A

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

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Modeled Sheet Data Validations

What's changing

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

What do I need to do

N/A

Additional considerations

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

What happens if I do nothing

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

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

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Modeled Sheet Data Validations

Impact analysis

Before the release	After the release
Before the release the maximum limit of validations was capped to 10.	With this release, workday continue to enhance your ability to use data validation rules for user-entered data on modeled sheet cells, enabling you to create more active validation rules (upto 15)

Impact description
This gives you greater control over user-entered data on your modeled sheets.

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

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Reset to Default View on Sheets

What's changing

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

What do I need to do

N/A

Additional considerations

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

What happens if I do nothing

N/A

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

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Reset to Default View on Sheets

Impact analysis

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

Impact description
This makes it easier to troubleshoot when you can't load your sheet.

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

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Worktag Change Lease Amendments

What's changing

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

What do I need to do

Access the Maintain Supplier Contact Lease Amendment Types task.

Add a row for a Worktag Change amendment type.

- Select the Worktag Change check box.

Additional considerations

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

What happens if I do nothing

You can only create amendments for:

Lease Extension

Non-CPI Payment Change

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

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Setup required

Worktag Change Lease Amendments

Impact analysis

Before the release	After the release
Workday did not have a Worktag change option to select when creating a new Supplier Contract Lease Amendment Type.	Workday provides a new Worktag Change lease amendment type that you can use to change worktags on the contract lines for operating lease contracts with straight-line or ROU asset operating expense accounting methods, enabling you to automatically update the lease accounting transactions.

Impact description
You can now update your lease contract worktags, streamlining the lease amendment process and eliminating the manual effort in making changes to worktags for lease contracts.

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

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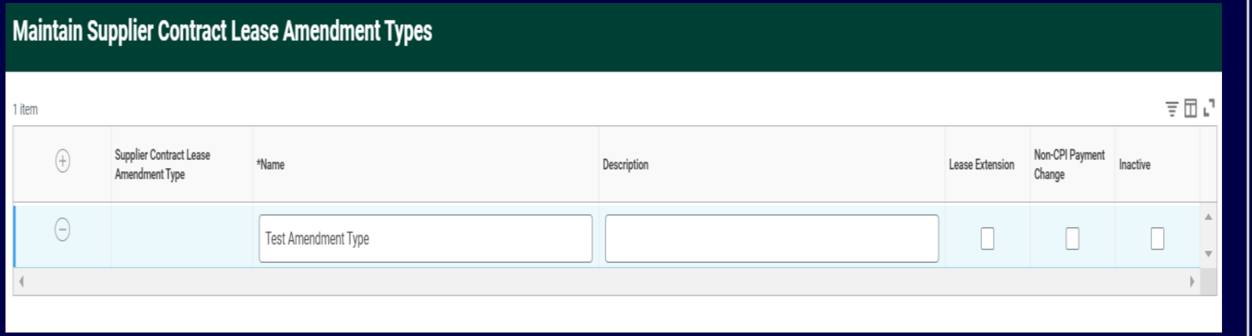
Setup required

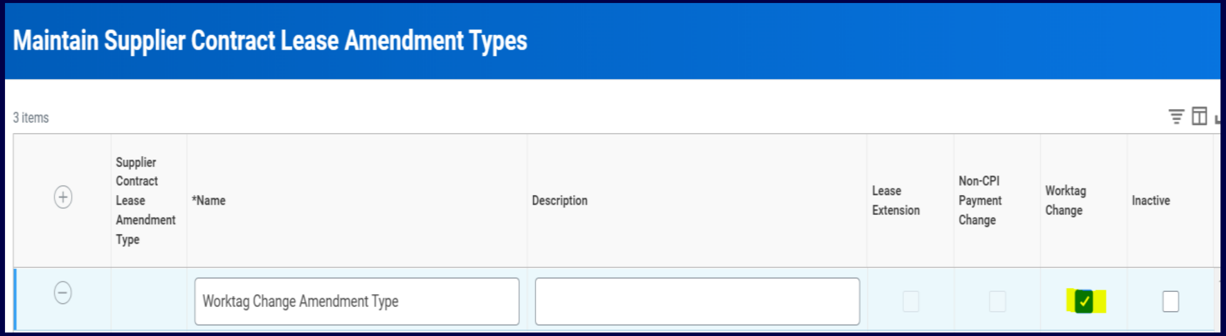
Worktag Change Lease Amendments

Impact analysis

Before the release



After the release



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Commitment and Obligation Ledgers as Versions

What's changing

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

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

Additional versions for:

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

Additional considerations

In the Set Up Reporting Model task, administrators can now configure additional versions for: • Commitment Ledger, Obligation Ledger, and Show Details fields specifically for these Versions.

What do I need to do

To use the Commitment and Obligation Ledgers:

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

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

What happens if I do nothing

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

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

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Setup required

Commitment and Obligation Ledgers as Versions

Impact analysis

Before the release	After the release
Earlier you were not able to configure additional versions and show detail fields for these versions for Commitment and Obligation Ledgers.	For OfficeConnect for Financial Management, administrators can now configure additional versions and corresponding Show Details fields for these versions. In the **Set Up Reporting Model** task, administrators can now configure: Additional versions for: Commitment Ledger Obligation Ledger Show Details fields specifically for these Versions.

Impact description
You can now report on Commitment and Obligation Ledgers, also known as Pre-encumbrance or Encumbrance ledgers in OfficeConnect for Financial Management. These ledgers are typically used in Education and Government industries.

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

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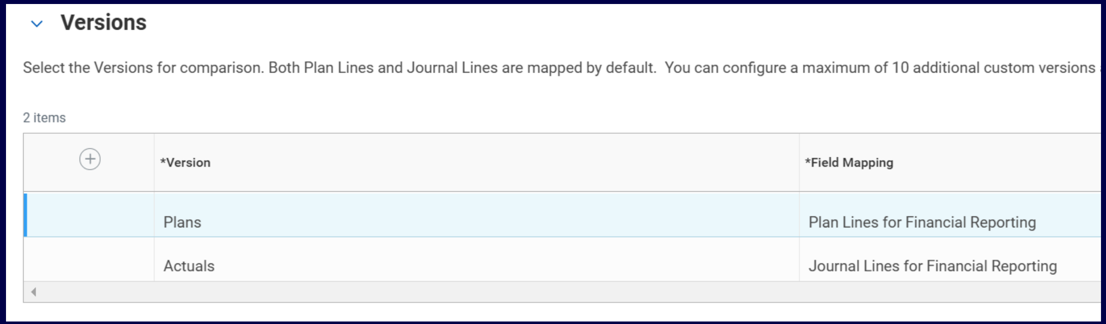
Setup required

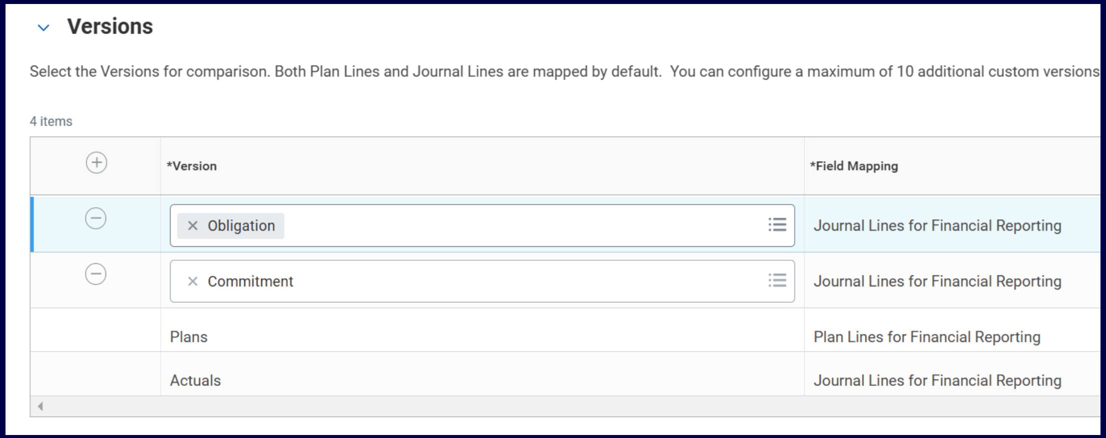
Commitment and Obligation Ledgers as Versions

Impact analysis

Before the release



After the release



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Average Daily Balance Custom Reporting

What's changing

Workday delivers a new Journal Lines for Company Average Daily Balance and Ending Balance Reporting report data source (RDS) filter on the Journal Lines for Financial Reporting RDS that you can use to filter journal lines for balance sheet ledger accounts that you want to report on for average daily balances. Workday deliver a new Average Daily Balance financial statement amount type to use only with the Journal Lines for Company Average Daily Balance and Ending Balance Reporting RDS filter. Workday support eliminations on interworktag, intercompany, and noncontrolling interest (NCI) in average daily balance reporting using the new report data source filter. To include NCI, you must opt in to run persisted NCI by ownership.

What do I need to do

Opt-in to the redesigned retained earnings reporting feature. Access the Opt-In to Roll Forward with Balance Sheet Ledger Account task to confirm whether you opted in or complete the opt-in process. See link in the Related Information section. To include NCI, ensure you are opted in to run persisted NCI by ownership. See link in the Related Information section. Create a custom report with the Journal Lines for Financial Reporting report data source and Journal Lines for Company Average Daily Balance and Ending Balance Reporting RDS filter. In the Row Grouping table > Group by Field column, select Balance Sheet Ledger Account.

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

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Average Daily Balance Custom Reporting

What's changing

Workday deliver these new report fields on the Journal Line business object (secured to the Public Reporting Items domain) that you can use in calculating average daily balances in a custom report:

- Journal Line Amount for Average Daily Balance.
- Number of Days
- Translated Journal Line Amount for Average Daily Balance

Workday now enables the Average Daily Balance (Do Not Use) and Translated Average Daily Balance (Do Not Use) summarization fields. Workday plans to rename these fields at a later date. Note: These new report fields are delivered in support of the summarization fields. The journal line amount report fields are not intended to be used independently unless in a calculation with the number of days report field.

What happens if I do nothing

Nothing. You can still use existing average daily balance functionality.

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

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Average Daily Balance Custom Reporting

Additional Considerations

Workday delivers a new Journal Lines for Company Average Daily Balance and Ending Balance Reporting report data source (RDS) filter on the Journal Lines for Financial Reporting RDS that you can use to filter journal lines for balance sheet ledger accounts that you want to report on for average daily balances.

Workday delivers a new Average Daily Balance financial statement amount type to use only with the Journal Lines for Company Average Daily Balance and Ending Balance Reporting RDS filter. Workday support eliminations on interworktag, intercompany, and noncontrolling interest (NCI) in average daily balance reporting using the new report data source filter.

To include NCI, you must opt in to run persisted NCI by ownership. Workday delivers these new report fields on the Journal Line business object (secured to the Public Reporting Items domain) that you can use in calculating average daily balances in a custom report: Journal Line Amount for Average Daily Balance • Number of Days • Translated Journal Line Amount for Average Daily Balance Workday now enables the Average Daily Balance (Do Not Use) and Translated Average Daily Balance (Do Not Use) summarization fields. Workday plans to rename these fields at a later date. Note: These new report fields are delivered in support of the summarization fields. The journal line amount report fields are not intended to be used independently unless in a calculation with the number of days report field. "

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

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Setup required

Average Daily Balance Custom Reporting

Impact analysis

Before the release	After the release
The new data sources, fields and filters were not available before the release.	Workday delivers new reporting items that you can use in custom reporting for average daily balance and translated average daily balance. Workday delivers a new Journal Lines for Company Average Daily Balance and Ending Balance Reporting report data source (RDS) filter on the Journal Lines for Financial Reporting RDS that you can use to filter journal lines for balance sheet ledger accounts that you want to report on for average daily balances. Workday delivers a new *Average Daily Balance* financial statement amount type to use only with the Journal Lines for Company Average Daily Balance and Ending Balance Reporting RDS filter.

Impact description
These reporting items enable you to calculate average daily balances in a custom report without the need to create and process average daily balance rules. You can also now calculate for translated balances.

https://doc.workday.com/release-notes/en-us/fincls/8448131.html

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Setup required

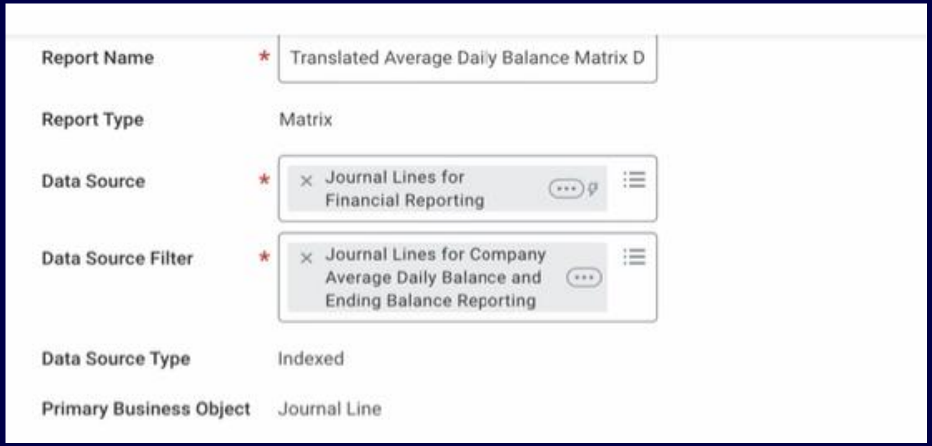
Average Daily Balance Custom Reporting

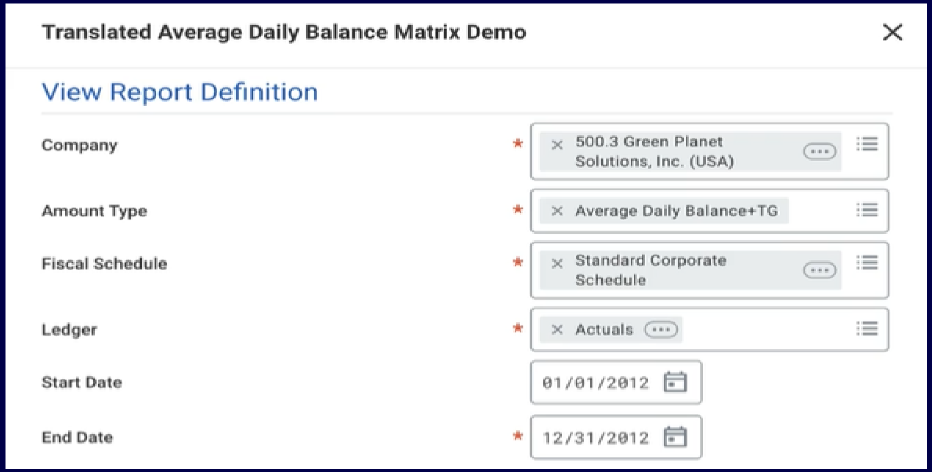
Impact analysis

Before the release

- Report fields and data source were not available before the release.

After the release





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Allocation Plans for Financial Accounting

What's changing

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

Workday offers a variety of changes with this release:

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

What do I need to do

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

Before you create an allocation plan, configure these steps:

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

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

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Allocation Plans for Financial Accounting, cont.

Additional Considerations

Workday adds a new Allocation Pool journal source which you can configure as:

- Journal source on the Maintain Journal Sources task.
- Journal entry source on the Maintain Journal Source Mapping to Operational Transactions task.

Workday adds a new Allocation Pool Transaction operational transaction type for the Operational Transaction Types for Period Close on this task and report:

- Maintain Period Close Activity Groups
- View Period Close Activity Groups

Workday adds these new prompts on the Edit Tenant Setup - Financials task that you can use to generate sequence numbers for transactions created when you process an allocation plan:

- ID Generator for Allocation Pool Transaction
- ID Generator for Allocation Pool Transaction Line Group
- Security

What do I need to do

- Access the Edit Tenant Setup - Financials task to specify sequence generators for allocation pool transactions and allocation line groups.
- Configure the new domain and business process security policies.
- Access the Maintain Worktag Usage report to configure allowed worktag types on Allocation Pools.

What happens if I do nothing

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

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

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Allocation Plans for Financial Accounting, cont.

Additional Considerations

Workday delivers these new security domains in the Financial Accounting functional area:
- Access Allocation Plan for Pool Creation
- Process Allocation Plans, with these subdomains:
    - Process Allocation Plans - Cancel
    - Process Allocation Plans - Process
    - Process Allocation Plans - Reporting
    - Process Allocation Plans - Reprocess
    - Process Allocation Plans - View

These new subdomains to the existing Reports:
- Allocation Pools domain:
    - Reports: Allocation Pool Transactions
    - Reports: Summarized Allocation Pool Transactions
    - View Allocation Pool Transactions
    - Set Up: Allocation Plan
    - Set Up: Allocation Pool Worktag Override Rule

Workday delivers a new Roles - Allocation Plan security group as an Allowed Security Group Type on Allocation Plan and Allocation Pool domains and business process security policies, enabling you to control who can access allocation plans.

Allocation Plan Tasks and Reports

Workday delivers new allocation plans to define high-level configurations for allocation pools and source journal lines you want to allocate. These plans enable you to provide structure as source amounts allocate through multiple tiers of allocation pools. Workday delivers these tasks and reports (secured to the new Set Up: Allocation Plan domain) that you can use to create and maintain allocation plans:
- Create Allocation Plan
- Edit Allocation Plan
- View Allocation Plan
- View Allocation Plan Structure

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

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Setup required

Allocation Plans for Financial Accounting, cont.

Additional Considerations

Workday also delivers a new Cancel Allocation Plan Run task (secured to the new Set Up: Allocation Plan domain) that you can use after processing an allocation plan to cancel selected plan runs.

Allocation Pool Tasks and Reports

Workday updates allocation pools to now support allocation plans with enhanced effective-dated functionality. Use these pools to define what happens to costs and revenue as they process through an allocation plan. Workday updates these tasks and report:

- Create Allocation Pool
- Edit Allocation Pool
- View Allocation Pool

Workday also delivers a new Cancel Allocation Plan Run task (secured to the new Set Up: Allocation Plan domain) that you can use after processing an allocation plan to cancel selected plan runs.

Allocation Pool Tasks and Reports

Workday updates allocation pools to now support allocation plans with enhanced effective-dated functionality. Use these pools to define what happens to costs and revenue as they process through an allocation plan. Workday updates these tasks and report:

- Create Allocation Pool
- Edit Allocation Pool
- View Allocation Pool

If you created allocation pools before this release, use the new Upgrade Allocation Pool task (secured to the Set Up: Allocation Pool domain) to enable the enhancements on those pools.

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

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Allocation Plans for Financial Accounting, cont.

Additional Considerations

Workday delivers a new Copy Allocation Pool task (secured to the Set Up: Allocation Pool domain) that you can access when viewing an allocation pool or from the related action menu of a pool.

Workday also delivers a new Edit Allocation Pool Options task (secured to the Set Up: Allocation Pool domain) to use after initially creating a pool. Use this task to create an effective-dated version of a pool. If the pool version impacts processed allocation transactions, you may need to reprocess your allocation plan.

Access the new View Allocation Pool As Of and Find Allocation Pool Versions reports (secured to the Set Up: Allocation Pool domain) to review your allocation pools.

Workday also delivers a new Create Allocation Pool Worktag Override Rule task (secured to the new Set Up: Allocation Pool Worktag Override Rule domain) that you can use to override or add worktags to allocation pool transactions allocating to specific allocation pools. Example: You want the transactions allocating into a final allocation pool with a specific Fund worktag to instead use a different Fund worktag. These override rules are not effective-dated and may be used across multiple pools. Workday also delivers to Set Up: Allocation Pool Worktag Override Rule domain:

- Edit Allocation Pool Worktag Override Rule
- View Allocation Pool Worktag Override Rule

Workday now enable Custom Objects for allocation pools. You can use custom objects to capture information specific to your organization on your allocation pools.

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

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Allocation Plans for Financial Accounting, cont.

Additional Considerations

After you create your source journals and process your allocation plans, access these reports (secured to the new ReportsAllocation Pool Transactions domain) to review the allocation pool transactions generated by your plan run:

- Find Allocation Pool Transactions
- Find Allocation Pool Transaction Line
- Allocation Plan Business Processes

Workday delivers these new tasks and business processes (secured to the Financial Accounting functional area), enabling you to process source journal lines for an allocation plan:

- Process Allocation Plan task, secured to the Allocation Plan Process

Event business process.

- Reprocess Allocation Plan task, secured to the Allocation Plan Reprocess Event business process.

Note: You must set up these business processes using the Create Business Process Definition (Default Definition) task before you can use them.

Managerial Reporting for Allocation Plans

Workday delivers a new Allocation Plan Summary report (secured to the new Reports: Summarized Allocation Pool Transactions domain) that you can use to trace source journal lines to final allocation pool transactions after you process an allocation plan. This standard report displays source journal lines grouped by common dimensions and enables you to view the resulting final transactions. Workday recommends you use this report to create a custom report and configure the source and target dimensions as needed for your organization.

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

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Allocation Plans for Financial Accounting, cont.

Additional Considerations

Other Tasks and Reports
To support the new allocation pool functionality, Workday updates the Edit Account Set task to prevent you from retiring a ledger account when it’s in use on an active allocation pool that:

- Has the version status Active or Pending.
- Has an effective date of the current or a future date.
- Is on an active allocation plan.

Workday also delivers a new Used by Allocation Pool Version field that displays on the View Ledger Account report when the ledger account is in use on an active allocation pool that meets the same criteria.

Workday also adds a new Pending Allocation Plans tab to the Update Ledger Period Status task, and a new Pending Allocation Pools column to the Mass Update Ledger Period Status task. Use these items to review pending items before you update the status for a fiscal period.

Report Data Sources (RDSs)
Workday delivers these new report data sources (RDSs) that you can use in custom reporting:

- Allocation Plan Runs RDS, secured to the Process Allocation Plans - Reporting domain
- Allocation Pool Transactions RDS and Allocation Pool Transaction Lines RDS, secured to the new Reports: Allocation Pool Transactions domain

Report Data Source Filters (DSFs)
Workday delivers these new data source filters that you can use in custom reporting:

- Journal Lines for Allocation Pools on the existing Journal Lines RDS
- Allocation Pool Transaction Data Source Filter on the new Allocation Pool Transaction Lines RDS
- Allocation Pool Transactions for Plan on the new Allocation Pool Transactions RDS

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

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Allocation Plans for Financial Accounting, cont.

Additional Considerations

Report Fields

Workday delivers many new report fields on these new or existing business objects and which you can use in custom reporting:

- Allocation Plan
- Allocation Plan Run
- Allocation Pool
- Allocation Pool Hierarchy
- Allocation Pool Options
- Allocation Pool Transaction Line
- Allocation Pool Transactions

SOAP Web Services

Workday delivers these new SOAP web services in v44.0:

- Secured to the new Set Up: Allocation Plan domain:
  - Get Allocation Plans
  - Put Allocation Plan
- Secured to the Set Up: Allocation Pool domain:
  - Get Allocation Pool Worktag Override Rules
  - Put Allocation Pool Worktag Override Rule

Workday updated these web services to support the new allocation pool enhancements:

- Get Allocation Pool Hierarchies
- Get Allocation Pools
- Put Allocation Pool Hierarchies
- Put Allocation Pool

Workday recommends that you use the most recent version of these web services. Older versions don’t support the enhanced functionality delivered in this release.

The Put Allocation Pool web service functions slightly differently to the Workday task when you create or update allocation pool versions. When you specify an effective date in your inbound request, Workday creates a new version with that effective date if one doesn't already exist

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

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Allocation Plans for Financial Accounting, cont.

Additional Considerations

Workday creates this new version even when the effective date you specify is inside the date range covered by another existing version. This has no functional impact on the data.

Note these limitations on allocation pool web services:

- Workday doesn't support attachments or roles on allocation pools or allocation plans. These web services will transfer the pool or plan data but not any attachments or roles.
- You can't use the Get Allocation Pools web service to retrieve allocation pool versions in Pending or Archived status.
- You can't use the Put Allocation Pool web service to update or delete an existing allocation pool version in Pending or Archived status.
- You can't specify an Assignable Role when you inactivate an allocation pool using the Put Allocation Pool web service through an Enterprise Interface Builder (EIB). The EIB keeps all role assignments when you inactivate an allocation pool through web services
- To support bulk migration of allocation pools between tenants, Workday has disabled some validations about accounts and worktag restrictions.

For more information about using these web services with EIBs, see the attached document, Allocation Pools and Allocation Plans: Recommendations for EIBs and Migrating Between Tenants. Workday now enable these previously delivered fields on the Get Tenant Setup - Financials and Put Tenant Setup - Financials web services:

- AP Transaction Sequence Generator
- AP Transaction Line Group Sequence Generator

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

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Allocation Plans for Financial Accounting, cont.

Additional Considerations

See the SOAP API Change Log link under Related Information.

- REST API

Workday updated the Custom Object v2 REST web service, enabling applications to access multi-instance custom object data related to allocation pools.

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

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Setup required

Allocation Plans for Financial Accounting

Impact analysis

Before the release	After the release
The new feature is an upgrade over the existing allocation pools feature Workday had. New allocation plans and other enhancements will be added.	You can use allocation plans to comply with legislative requirements, or a defined expense or revenue allocation. This allows for managing and reporting of shared costs across companies, cost centers, grants, and programs. Workday enhances the Allocation Pools feature and delivers new Allocation Plans. These plans support a financial process that allocates shared costs or revenue across various dimensions based on a top-down, customer-configured structure.

Impact description
These reporting items enable you to calculate average daily balances in a custom report without the need to create and process average daily balance rules. You can also now calculate for translated balances.

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

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Setup required

Assign Match Status for Intercompany Journal Lines

What's changing

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

Additional considerations

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

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

What do I need to do

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

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

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

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

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Assign Match Status for Intercompany Journal Lines

Additional considerations

Note: These features don't support:

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

What happens if I do nothing

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

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

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Setup required

Assign Match Status for Intercompany Journal Lines

Impact analysis

Before the release	After the release
The New tasks to support manual intercompany matching and reconciliation reporting were not available before the release.	To support manual intercompany matching and reconciliation reporting, Workday delivers new tasks to mark intercompany journal lines as available or unavailable for matching.

Impact description
These new tasks give you the flexibility to include or exclude intercompany journal lines you want to manually match across 2 or more companies.

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

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Setup required

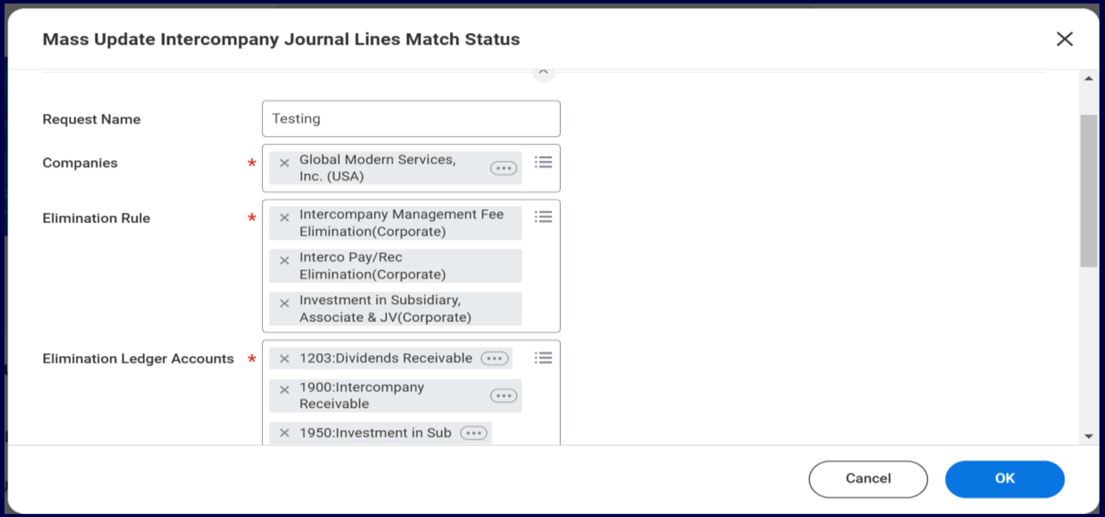
Assign Match Status for Intercompany Journal Lines

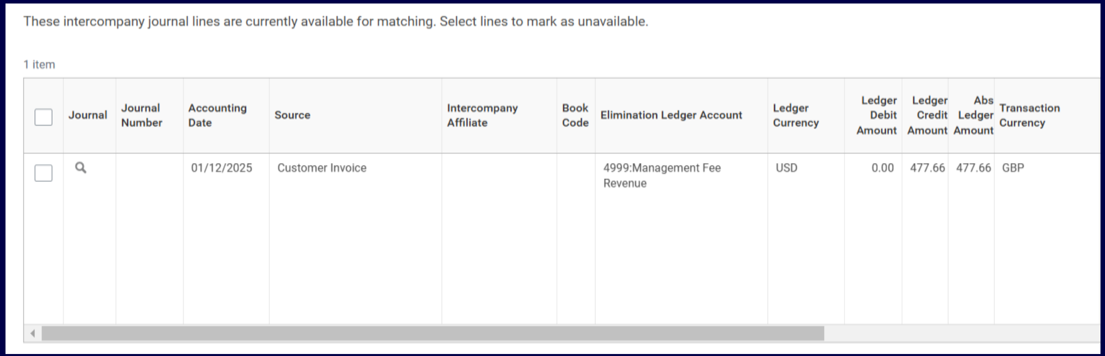
Impact analysis

Before the release

- The New tasks to support manual intercompany matching and reconciliation reporting were not available before the release.

After the release





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Company Ownership Details Report Data Source

What's changing

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

What do I need to do

N/A

Additional considerations

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

What happens if I do nothing

N/A

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

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Company Ownership Details Report Data Source

Impact analysis

Before the release	After the release
The Company Ownership Details report data source was not available before this release.	Workday delivers a new Company Ownership Details report data source (secured to the *Set Up: Consolidations* domain) that you can use in custom reporting.

Impact description
These new tasks give you the flexibility to include or exclude intercompany journal lines you want to manually match across 2 or more companies.

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

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Company Ownership Details Report Data Source

Impact analysis

Before the release

- The Company Ownership Details report data source was not available before this release.

After the release

1 of 2929 items

Data Source	Primary Business Object	Description	Data Source Type
Company Ownership Details	Company Ownership Details	Accesses Company Ownership Details as its primary business object and returns 1 row per ownership details. Only includes ownership details for companies that you have access to.	Standard

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Display Custom Reports on the Close and Consolidation Hub

What's changing

You can now customize the cards on the Overview tab of the Close and Consolidation hub to display custom matrix reports of your choice, rather than reports delivered by Workday.

Additional considerations

Workday delivers a new Edit Card by Admin task (secured to the Set Up: Tenant Setup - General and Set Up: Tenant Setup - Cards domains) that you can use to display custom matrix reports in cards on the Overview tab of the Close and Consolidation hub.

You can access this task by clicking the new Edit button that Workday displays for each card on the Configure Hub by Admin task. You can access the Configure Hub by Admin task by first accessing the Maintain Hubs task, then selecting Action > Configure Overview for the Close and Consolidation hub.

What do I need to do

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

- Access the Create Custom Report or Edit Custom Report task and create or select your matrix report.
- To enable the filter prompts on the Close and Consolidation hub to adjust the data shown in the card, select a report data source or data source filter that has report fields as required or optional prompts that you can map to the hub filter prompts.

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

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Display Custom Reports on the Close and Consolidation Hub, cont.

Additional considerations

On the Edit Card by Admin task, you can configure:

A custom matrix report to replace the default report on the card.

Informational text to display on the card, such as a title or subtitle.

An overview menu to link to other resources, such as websites or reports.

What do I need to do

- For the Consolidation Group hub filter prompt, you can map a Company or Company/Company Hierarchy report field.
- For the Close Period hub filter prompt, you can map either a pair of start and end date report fields or a single accounting period report field.
- For examples, see the attached document, Sample Report Configurations for Custom Cards on the Close and Consolidation Hub.
- Navigate to the Prompts tab.
- Map a company report prompt to the Consolidation Group hub filter prompt:
- Add a row to the Prompt Defaults grid and select the Company or Company/Company Hierarchy field.

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

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Display Custom Reports on the Close and Consolidation Hub, cont.

What do I need to do

- For the default type, select Determine default value at runtime.
- For the default value, select Consolidation Group.
- Select the required check box.
- Select the Do Not Prompt at Runtime check box.
- When the report data source or data source filter has start and end date prompts, map these to the Close Period hub filter prompt:
- Add 2 rows to the Prompt Defaults grid and select the start and end date report fields.
- For the default type, select Determine default value at runtime.
- For the default values, select Fiscal Period Start Date and Fiscal Period End Date.

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

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Display Custom Reports on the Close and Consolidation Hub, cont.

What do I need to do

- Add rows for all other prompts on the report data source or data source filter, and select the Do Not Prompt at Runtime check box for each row.
- Navigate to the Output tab, and select the output type Chart.
- Navigate to the Share tab and select Share with all authorized users.

Configure the Close and Consolidation hub to display your custom reports in cards on the Overview tab:

- Access the Maintain Hubs task.
- For the Close and Consolidation hub, select Action > Configure Overview.
- On the Configure Hub by Admin task, click the Edit button for the card you want to display a custom report on.

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

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Display Custom Reports on the Close and Consolidation Hub, cont.

What do I need to do

- On the Informational Text tab, select the Customize Title check box and enter a new title for the card.
- On the Overflow Menu tab, add rows to the grid to set up an overflow menu for the card.
- Select security groups or condition rules to control which users can see the overflow menu items.
- Add subrows to the Links and select items to display in the overflow menu.
- On the Custom Report tab, select the custom report you want to display.

What happens if I do nothing

The Close and Consolidation hub will continue to function as before with the default cards.

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

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Display Custom Reports on the Close and Consolidation Hub

Impact analysis

Before the release	After the release
Prior to this release no option to add custom reports to Close and Consolidation Hub	You can access this task by clicking the new Edit button that Workday displays for each card on the Configure Hub by Admin task. You can access the Configure Hub by Admin task by first accessing the Maintain Hubs task, then selecting Action > Configure Overview for the Close and Consolidation hub

Impact description
NA

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

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Support for Accounting Center Data in OfficeConnect for Financial Management

What’s changing

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

- Accounting Center data
- Other ledger-like data.

What do I need to do

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

- Map fields from your Prism data source to the reporting model data source using the Field Mapping for Reporting Model task.
- (Optional) Create any tenanted fields that currently aren’t available to the reporting model using the Create Custom Fields task. Also, you must then map these fields to the reporting model data source.
- During mapping, specify the version associated with the Prism data source:
- To specify a single version for all records in the data source, use the Create Custom Version task.
- To assign different versions to different records in the Prism data source, select a source field from the Prism data source. Configure the reporting model to include the mapped prism data as versions using the Set Up Reporting Model task.

End users can then see the Accounting Center and prism data as versions in OfficeConnect for Financial Management.

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

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Support for Accounting Center Data in OfficeConnect for Financial Management, cont.

Additional considerations

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

- Create Field Mapping for Reporting Model.
- Edit Field Mapping for Reporting Model.
- View Field Mapping for Reporting Model.
- Create Custom Fields.
- Create Custom Version. Workday update the Set Up Reporting Model task for configuring versions:
- In the Versions section, you can configure the Accounting Center Journals version and other custom versions to include Prism data. Workday currently supports up to:
- 10 custom versions and 10 data sources per version.

What happens if I do nothing

You'll see no changes in Workday if you haven't set up this feature. The field mappings and related versions won't be available to your reporting model. End users won’t see Accounting Center or other custom versions for Prism data in OfficeConnect for Financial Management.

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

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Support for Accounting Center Data in OfficeConnect for Financial Management, cont.

Additional considerations

- 15 Billion rows per version.
- In the Show Details section, you can configure fields for each custom version, such as Accounting Center Journals, for the Show Details option in OfficeConnect.
- In the Dimensions section, you can add dimensions that are applicable to the Prism data sources you configure.

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

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Setup required

Support for Accounting Center Data in OfficeConnect for Financial Management

Impact analysis

Before the release	After the release
N/A	For Financial Management customers, workday now provide these new tasks secured to the Set Up Reporting Model domain: Create Field Mapping for Reporting Model. Edit Field Mapping for Reporting Model. View Field Mapping for Reporting Model. Create Custom Fields. Create Custom Version.

Impact description
OfficeConnect for Financial Management users can now: • Report on Accounting Center and ledger-like Prism data sources. • Do comparison analysis using Workday-delivered and custom versions.

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

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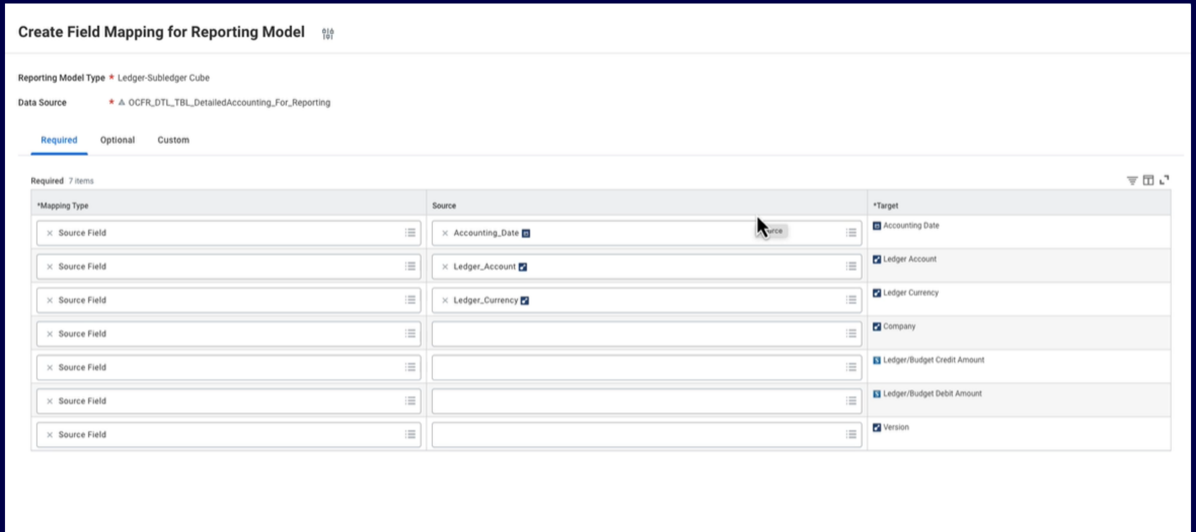
Support for Accounting Center Data in OfficeConnect for Financial Management

Impact analysis

Before the release

- N/A

After the release



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Integration

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Security Update for Core Connector: Assign Organization Inbound

What’s changing

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

Additional considerations

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

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

What do I need to do

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

What happens if I do nothing

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

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

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Security Update for Core Connector: Assign Organization Inbound

Impact analysis

Before the release	After the release
User having access to run the integration pertaining to be Core Connector: Assign Organization Inbound can access the output files .	User will need additional access to view the output file . Additional access required as Worker Data: Worker ID domain .

Impact description
Ensures the user has access to Integration output files.

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

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AWS GovCloud Support for Integration Files

What's changing

Workday now supports AWS GovCloud regions for integration data file delivery and retrieval. This enhancement enables you to directly retrieve and deliver integration data files to S3 buckets in an AWS GovCloud region without having to transfer those files to intermediary servers first.

Additional considerations

For Inbound EIBs, Workday adds these options to the Region prompt on the Get Data page of the Create EIB task when you select Amazon Simple Storage Service from the Retrieval Method prompt: • AWS GovCloud (US-East) • AWS GovCloud (US-West)

What do I need to do

N/A

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/eib/7957552.html

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AWS GovCloud Support for Integration Files, cont.

Additional considerations

For Outbound EIBs, Workday adds the same options to the Region prompt on the Deliver page of the Create EIB task when you select Amazon Simple Storage Service from the Delivery Method prompt. Using an Integration Retrieval service, you can now configure a integration business process definition with a Document Retrieval Service step to retrieve an integration data file from your Amazon S3 bucket in any AWS GovCloud Regions. Similarly, using an Integration Delivery service, you can now configure a integration business process definition with a Document Delivery Service step to deliver an integration data file to your Amazon S3 bucket in any of the AWS GovCloud Regions. Note: Currently, Amazon doesn't support S3 Transfer Acceleration in AWS GovCloud regions.

https://doc.workday.com/release-notes/en-us/eib/7957552.html

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AWS GovCloud Support for Integration Files

Impact analysis

Before the release	After the release
If customer wanted to send / retrieve files from AWS GovCloud region , they need to setup an intermeditary server in between workday and GovCloud .	Files can now be directly sent. retrieve from AWS S3 bucket GovCloud via EIB .

Impact description
EIB (Inbound/Outbound) can now directly retrieve and deliver integration data files to S3 buckets in an AWS GovCloud region .

https://doc.workday.com/release-notes/en-us/eib/7957552.html

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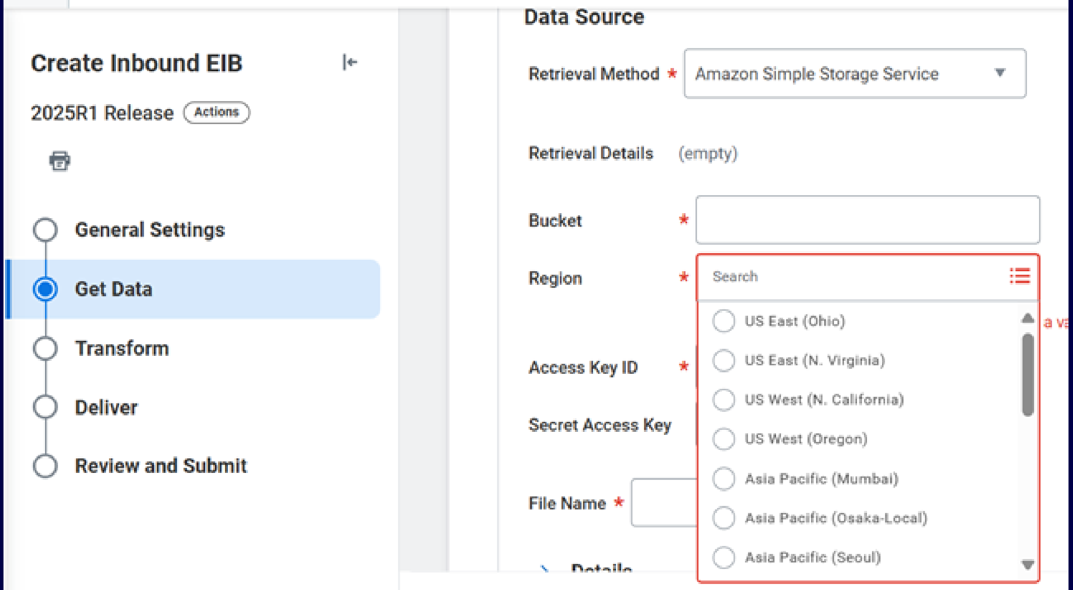
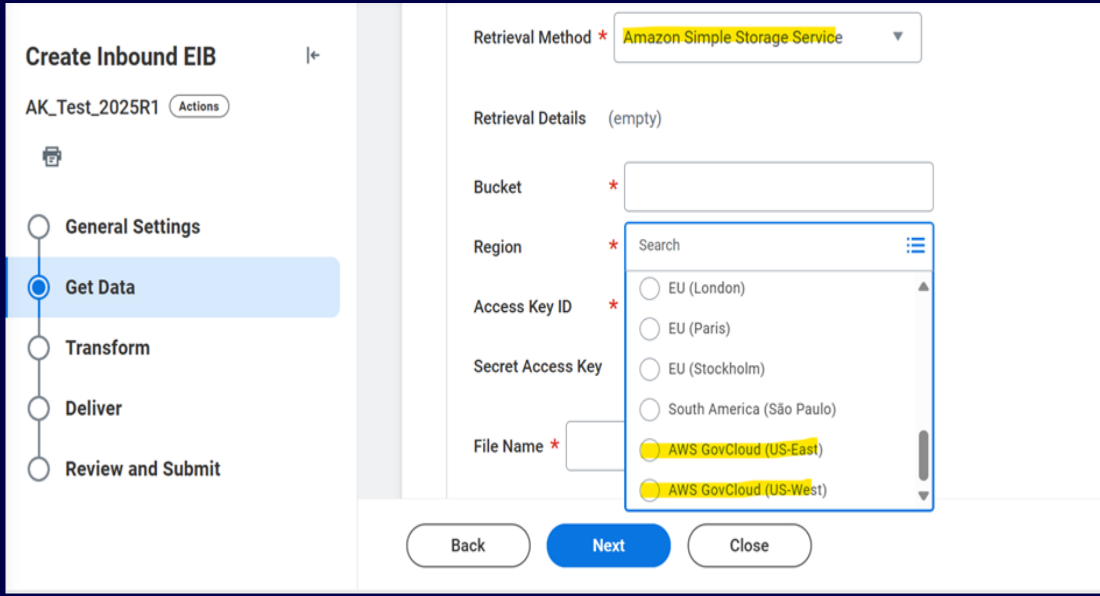
AWS GovCloud Support for Integration Files

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/eib/7957552.html

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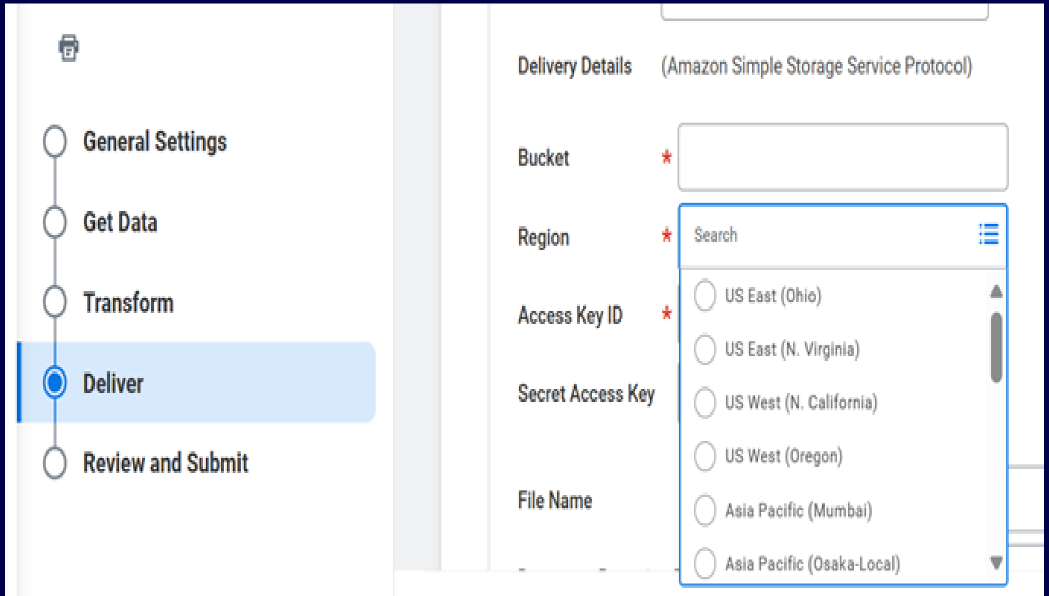
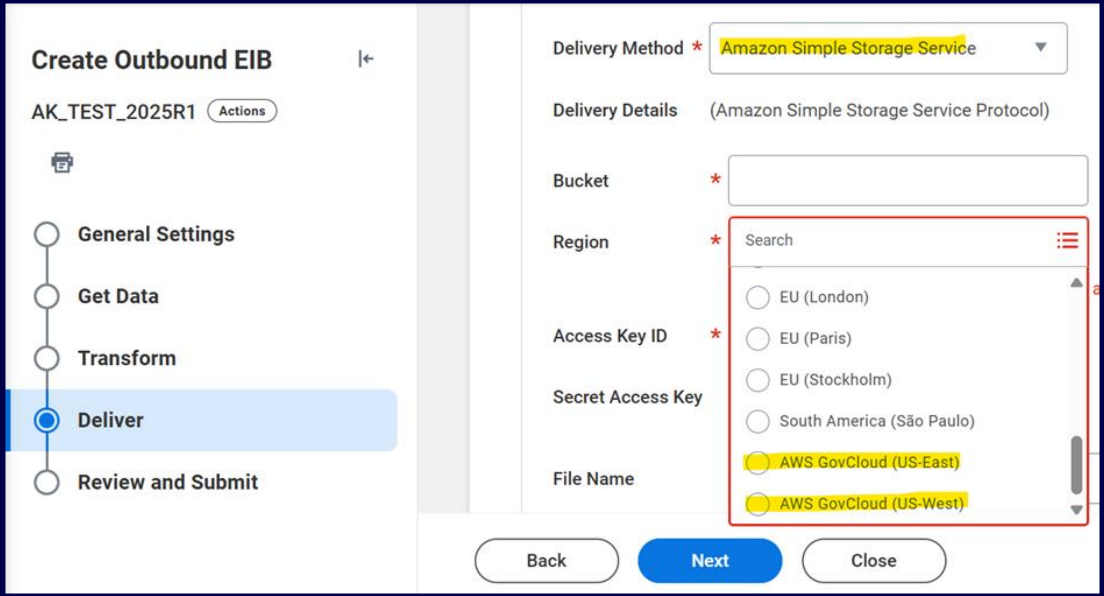
AWS GovCloud Support for Integration Files, cont.

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/eib/7957552.html

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Errors in Financial Payment Integrations

What's changing

Workday now displays error messages when outbound payment integrations are missing critical data to process.

What do I need to do

N/A

Additional considerations

Workday updates the logic in these outbound payment templates to send an error message when no customer invoices or journal lines are available:

- *Core Connector: Electronic Customer Invoices*
- *Financial Journal Lines Outbound Connector*

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/eib/7957552.html

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Errors in Financial Payment Integrations

Impact analysis

Before the release	After the release
The outbound payment integrations will proceed without error, even if critical data, such as customer invoices or journal lines, is missing	The updated logic will trigger error messages when critical data, such as customer invoices or journal lines, is missing, preventing the integration from processing successfully

Impact description
Error messages will be triggered when critical data, such as customer invoices or journal lines, is missing, ensuring outbound payment integrations are only processed with complete data

https://doc.workday.com/release-notes/en-us/finint/8720213.html

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Image Replacements in Workday

What's changing

With 25R1, Workday replaces images in the product.

Additional considerations

Workday update the Manage Payroll Interface Integration Command Center Data Queue task on the Payroll Interface Integration Command Center dashboard by replacing the images.

What do I need to do

N/A

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/payexternal/8712281.html

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Image Replacements in Workday

Impact analysis

Before the release	After the release
2024 Corporate branding Image on "Manage Payroll Interface Integration Command Center Data Queue" task .	2025 Corporate branding Image on "Manage Payroll Interface Integration Command Center Data Queue" task .

Impact description
Workday has undergone a corporate brand refresh and will replace these images throughout other product areas in future releases

https://doc.workday.com/release-notes/en-us/payexternal/8712281.html

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Accounting Journal Scalability and Performance

What's changing

Workday continues to deliver accounting journal scalability and performance updates.

What do I need to do

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

Additional considerations

- Workday updated the processing of the Unpost-Reverse Accounting Journal web service, enabling you to potentially experience faster run times when you use this web service to unpost or reverse journals with more than 500 journal lines.

What happens if I do nothing

There is no impact.

https://doc.workday.com/release-notes/en-us/payexternal/8712281.html

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Accounting Journal Scalability and Performance

Impact analysis

Before the release	After the release
The Unpost-Reverse Accounting Journal web service may experience longer run times when unposting or reversing journals with over 500 journal lines, potentially impacting overall efficiency.	With the updated processing, the Unpost-Reverse Accounting Journal web service will potentially deliver faster run times when unposting or reversing journals with more than 500 journal lines, improving efficiency and scalability.

Impact description
The update to the Unpost-Reverse Accounting Journal web service will enable faster processing for journals with more than 500 journal lines, improving scalability and performance

https://doc.workday.com/release-notes/en-us/fincore/8058825.html

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Payroll Effective Change Interface Integration

What's changing

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

What do I need to do

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

Additional considerations

Include Compensation Data Section Integration Attribute

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

What happens if I do nothing

N/A

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

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Setup required

Payroll Effective Change Interface Integration

Impact analysis

Before the release	After the release
Only have option to select 'Always', As Of Termination Date (Secondary) and During PGI Event in Include compensation data section integration attribute .	Workday added Compensation Change Reason Only (Secondary) option to the Include Compensation Data Section integration attribute that you can select so PECI includes the compensation change reason even when that's the only change.

Impact description
No Impact. This is a new setup/additional functionality provided to select data in PECI.

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

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Setup required

Payroll Effective Change Interface Integration

Impact Analysis

Before the release

After the release

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

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Worker Effective Change Interface Integration

What’s changing

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

Additional considerations

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

What do I need to do

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

What happens if I do nothing

N/A

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

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Worker Effective Change Interface Integration, cont.

Additional considerations

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

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

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Setup required

Worker Effective Change Interface Integration

Impact analysis

Before the release	After the release
Only have option to select 'Always' in Include Position Data Section and Include compensation data section integration attribute .	Workday added Compensation Change Reason Only (Secondary) and option to the Include Compensation Data Section and Job Change Reason Only (Secondary) option on the Include Position Data Section to integration attribute that that developer can select so WECI includes the job/compensation change reason even when that's the only change.

Impact description
New setup provide additional functionality to select data in WECI.

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

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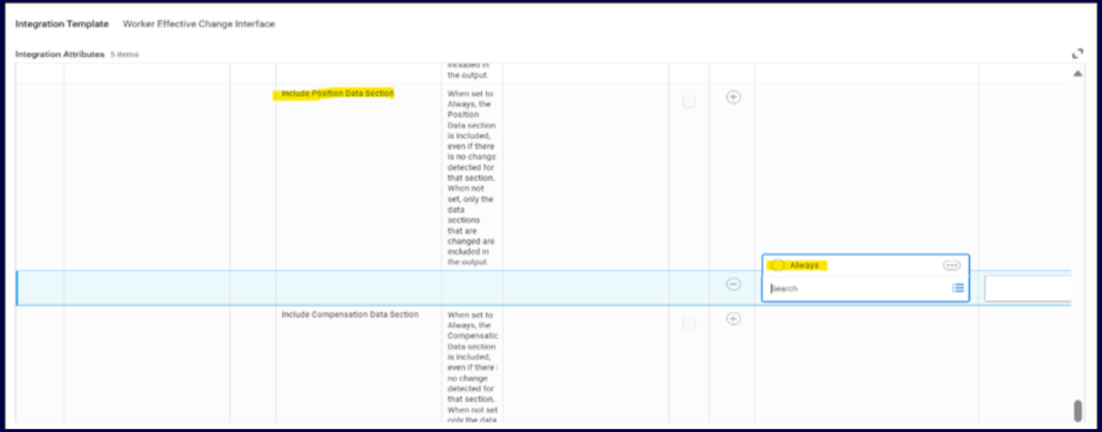
Setup required

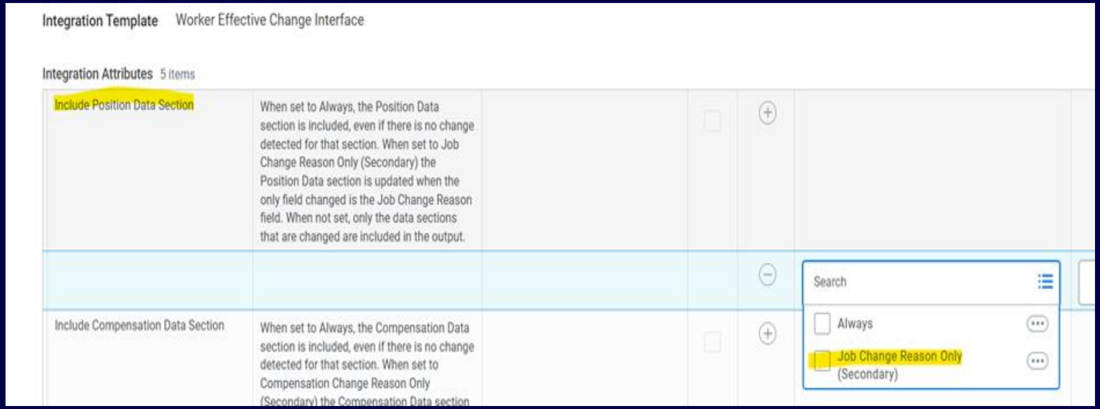
Worker Effective Change Interface Integration

Impact Analysis

Before the release



After the release



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

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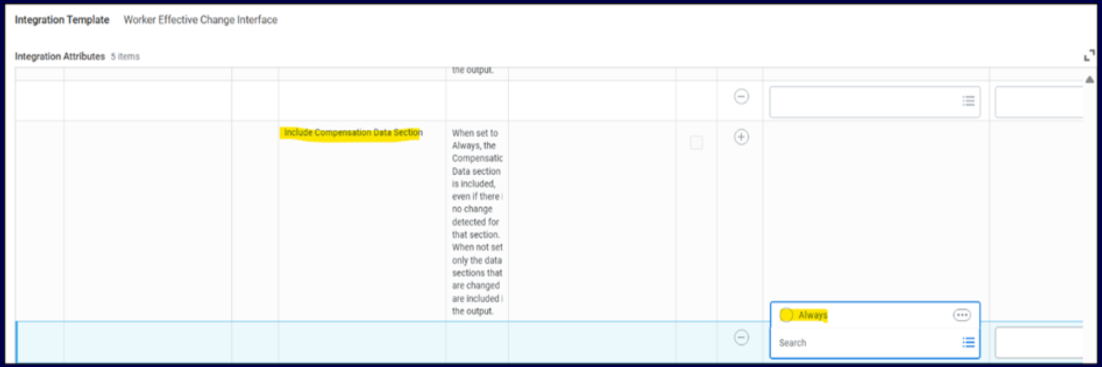
Setup required

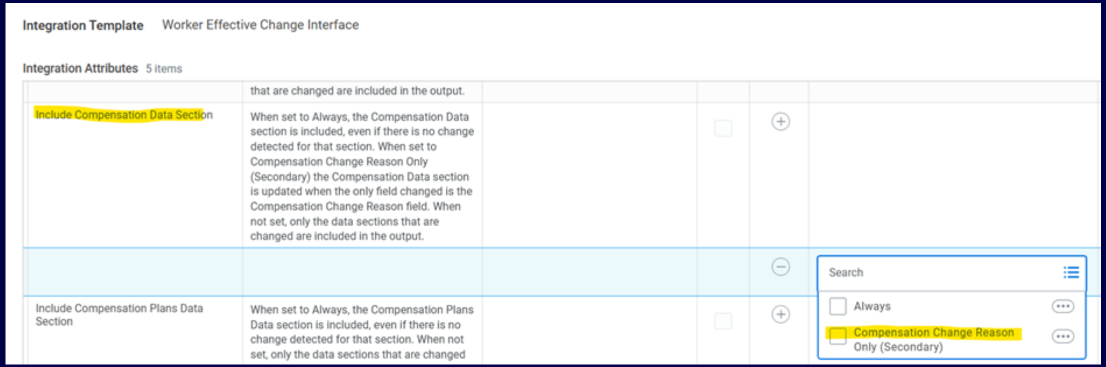
Worker Effective Change Interface Integration, cont.

Impact Analysis

Before the release



After the release



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

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Setup required

Bank Routing Rule Web Services

What's changing

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

- Get Bank Routing Rule
- Put Bank Routing Rule

Additional considerations

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

- Get Bank Routing Rule
- Put Bank Routing Rule

What do I need to do

Grant security access for the new web services.

What happens if I do nothing

N/A

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

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Bank Routing Rule Web Services

Impact analysis

Before the release	After the release
No Web service available for Bank routing rule.	Two new web service available which can be used.

Impact description
No Impact

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

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Setup required

Bank Routing Rule Web Services

Impact Analysis

Before the release

- N/A

After the release


```xml
<?xml version="1.0" encoding="UTF-8"?>
<env:Envelope
  xmlns:env="http://schemas.xmlsoap.org/soap/envelope/"
  xmlns:xsd="http://www.w3.org/2001/XMLSchema">
  <env:Body>
    <wd:Put_Bank_Routing_Rule_Request
      xmlns:wd="urn:com.workday/bsvc"
      wd:Add_Only="true"
      wd:version="v44.0">
      <wd:Bank_Routing_Rule_Reference>
        <wd:ID wd:type="Bank_Routing_Rule_ID">abcdef</wd:ID>
      </wd:Bank_Routing_Rule_Reference>
      <wd:Bank_Routing_Rule_Data>
        <wd:Bank_Routing_Rule_ID>abcdef</wd:Bank_Routing_Rule_ID>
        <wd:Company_Reference>
```



```xml
<?xml version="1.0" encoding="UTF-8"?>
<env:Envelope
  xmlns:env="http://schemas.xmlsoap.org/soap/envelope/"
  xmlns:xsd="http://www.w3.org/2001/XMLSchema">
  <env:Body>
    <wd:Get_Bank_Routing_Rules_Request
      xmlns:wd="urn:com.workday/bsvc"
      wd:version="v44.0">
      <wd:Request_References>
        <wd:Bank_Routing_Rule_Reference>
          <wd:ID wd:type="Bank_Routing_Rule_ID">abcdef</wd:ID>
        </wd:Bank_Routing_Rule_Reference>
      </wd:Request_References>
      <wd:Response_Filter>
        <wd:As_Of_Effective_Date>2025-02-10</wd:As_Of_Effective_Date>
```


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

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WPN - ISO 20022 V9 Credit Transfer Integration Template

What's changing

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

Additional considerations

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

The template is secured to these domains:

- Integration Event.
- Process: Settlement.

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

What do I need to do

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

What happens if I do nothing

N/A

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

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WPN - ISO 20022 V9 Credit Transfer Integration Template, cont.

Additional considerations

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

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

- CountryToClrChanl
- Override CountryToClrChanl by Payment Type

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

- BIC to BICFI
- ISODate to ISODateTime

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

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WPN - ISO 20022 V9 Credit Transfer Integration Template

Impact analysis

Before the release	After the release
The existing integration template does not support the new Legal Entity Identifier (LEI) field, and the current mapping only supports single values for the CountryToClrChanl and Override CountryToClrChanl by Payment Type. Additionally, payment file tags like BIC and ISODate do not comply with the version 9 format requirements.	The new ISO 20022 V9 Credit Transfer integration template supports the LEI field for identifying the company initiating the payment. It also enables multiple map values for CountryToClrChanl and Override CountryToClrChanl by Payment Type. Furthermore, payment file tags such as BIC are updated to BICFI, and ISODate is updated to ISODateTime to meet version 9 format requirements.

Impact description
Workday’s updated integration template supports the ISO 20022 V9 format with enhancements for the Legal Entity Identifier (LEI), multiple map values, and payment file tag updates to align with global payment processing standards.

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

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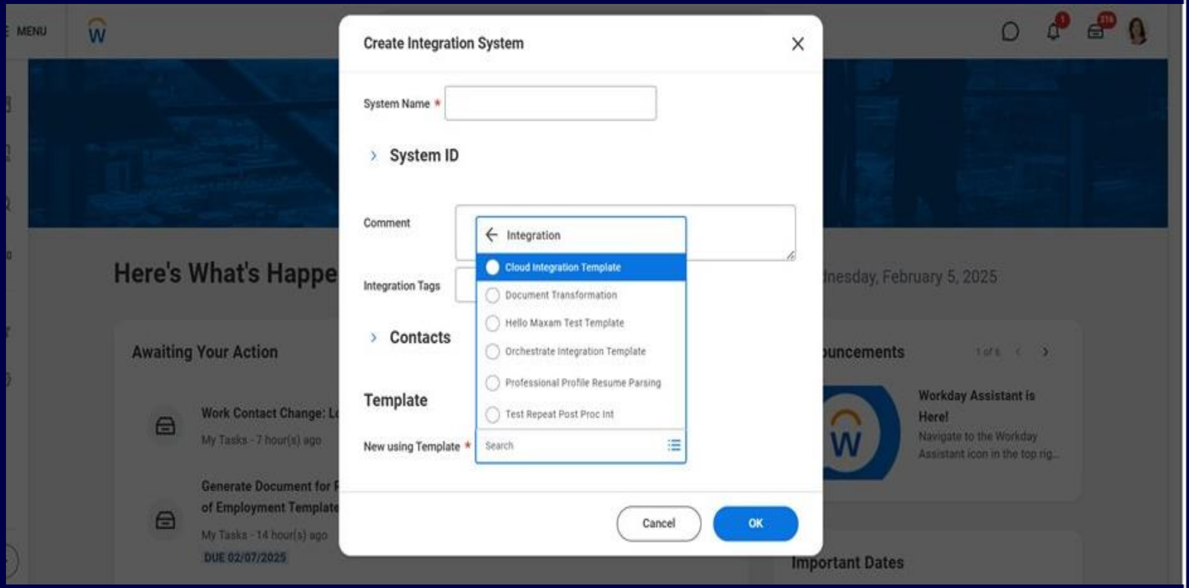
Setup required

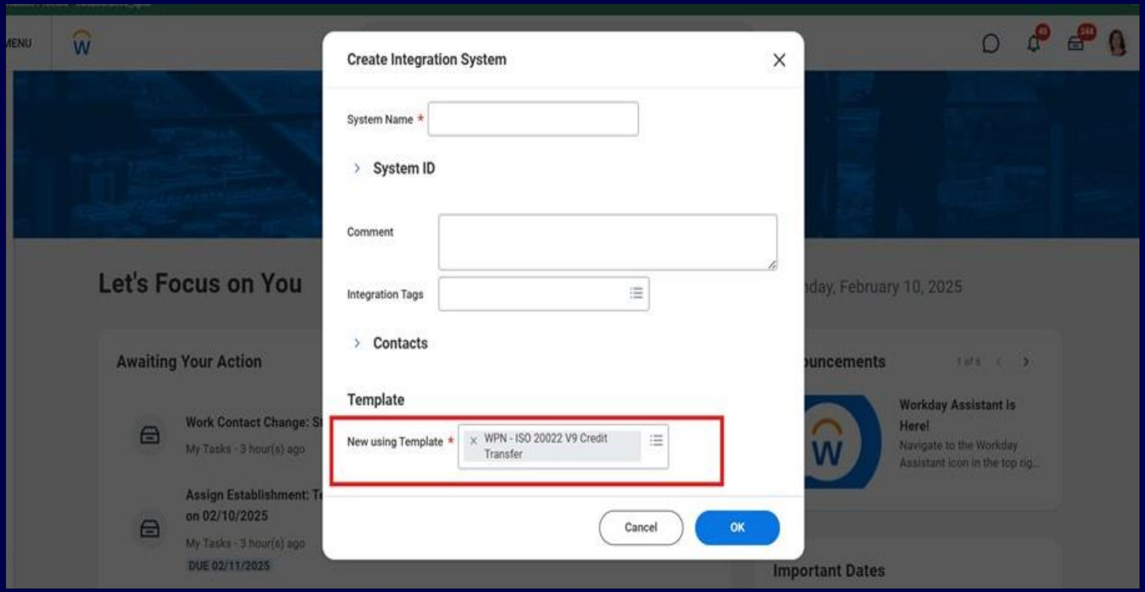
WPN - ISO 20022 V9 Credit Transfer Integration Template

Impact Analysis

Before the release



After the release



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

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Purchase Order cXML Punchout Connector Address Lines

What's changing

With this release, Workday enables you to specify up to 4 address lines when you define Ship To and Bill To addresses for purchase order cXML punchouts.

Additional considerations

Workday updated the Value field for the Allow Multiple Address Lines With Max Number attribute to enable you to specify up to 4 address lines in cXML punchout integrations.

What do I need to do

Configure up to 4 address lines by using the Maintain Address Component by Country task. See the Configure Additional Address Components feature.

Also, configure up to 4 address lines in your integration template using these steps:

1. Access the All Integration Systems report.

2. Select the Procurement Punchout Purchase Order - Custom Supplier integration templa te.

3. From the related actions of the desired integration system, select Integration System > Configure Integration Attributes.

4. Use the Allow Multiple Address Lines With Max Number attribute to configure up to 4 address lines in the Value field.

What happens if I do nothing

If you do nothing, your current address configuration won't change.

https://doc.workday.com/release-notes/en-us/smorder/8415814.html

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Setup required

Purchase Order cXML Punchout Connector Address Lines

Impact analysis

Before the release	After the release
Previously, the configuration for Ship To and Bill To addresses in purchase order cXML punchouts was limited to fewer address lines, which could restrict the flexibility needed for certain integrations.	With this release, you can now specify up to 4 address lines for Ship To and Bill To addresses in cXML punchouts, providing more flexibility in defining addresses through the Maintain Address Component by Country task and integration template configuration

Impact description
Workday’s update allows for up to 4 address lines when defining Ship To and Bill To addresses in cXML punchouts, enhancing flexibility in address configuration for purchase order integrations

https://doc.workday.com/release-notes/en-us/smorder/8415814.html

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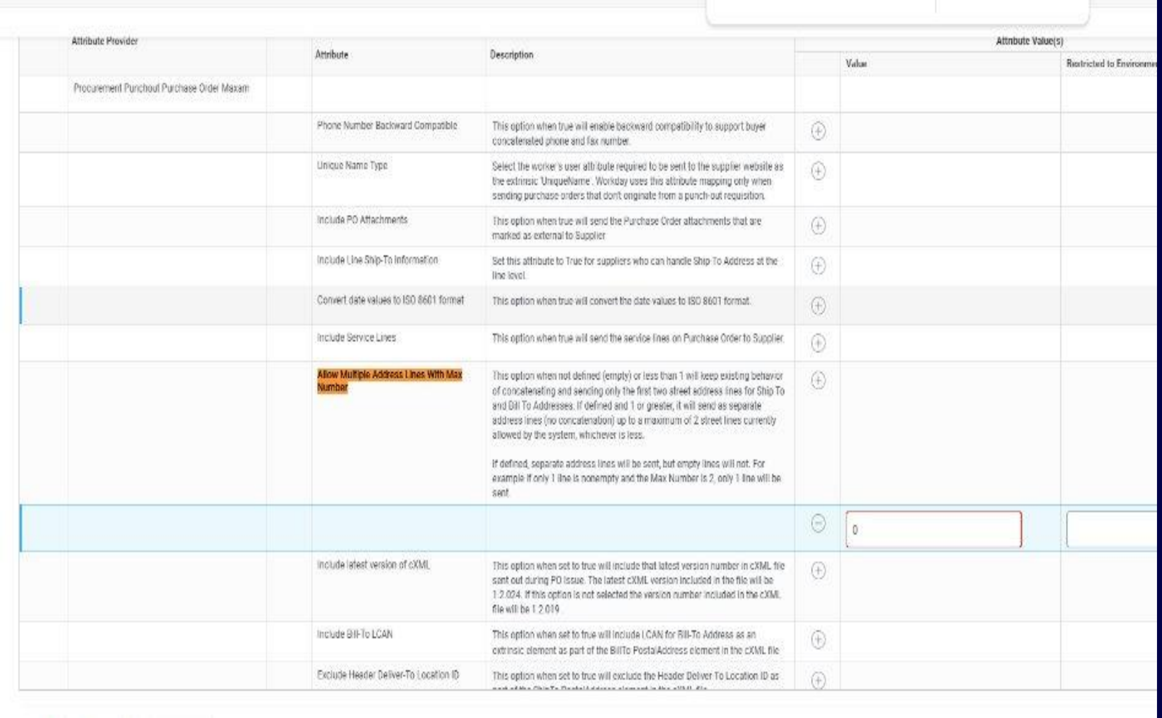
Setup required

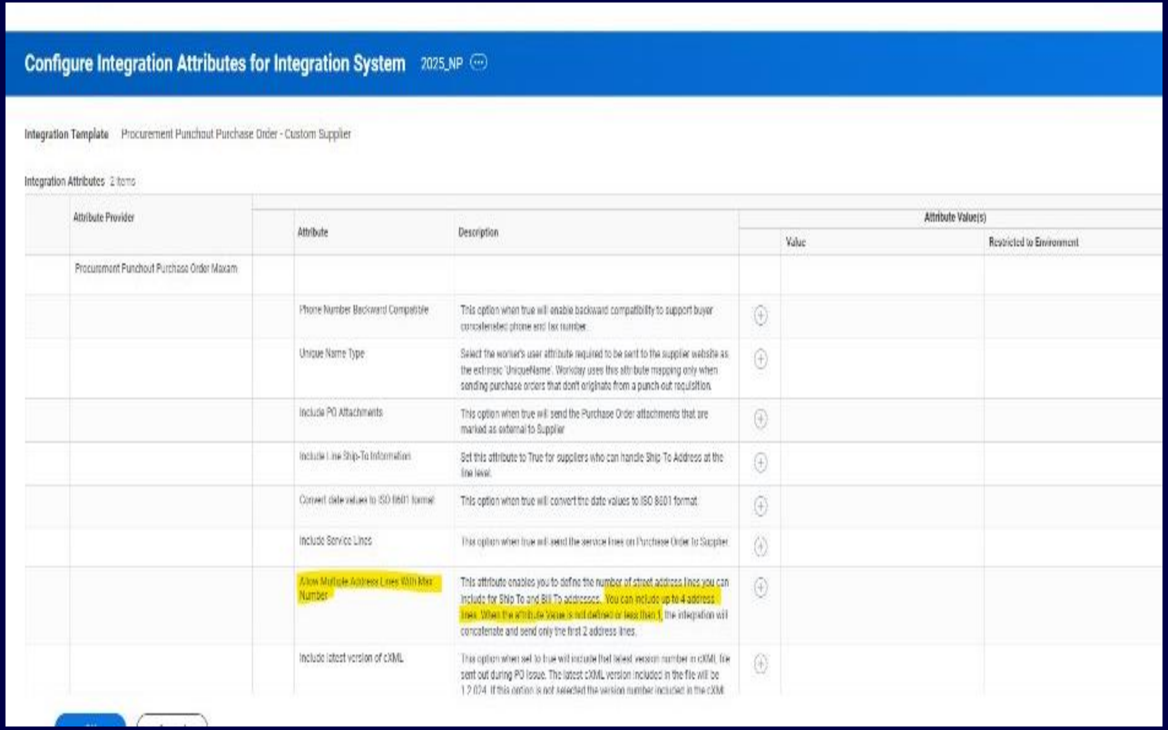
Purchase OrdercXML Punchout Connector Address Lines

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/smorder/8415814.html

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Visa Level 3 Hotel Data for Expense Credit Cards

What's changing

Workday continues to enhance data for credit cards and credit card transactions. Workday updates the Visa Commercial Format 4.4 (VCF 4) integration template, enabling you to view and report on level 3 hotel data from Visa credit card transactions. You can also now use Visa level 3 hotel credit card transaction data to automatically populate itemization lines on hotel expenses.

Additional Considerations

Workday adds these new fields to the Visa Commercial Format 4.4 (VCF 4) scrubbed integration template:

- Charge Date
- Check In Date
- Checkout Date

What do I need to do

Visa Commercial Data Solutions provides enhanced data procured through several sources such as acquirers, GDS, TMCs and Hotels. If you're not already enrolled, ensure the financial institution you work with subscribes your corporate card program for enhanced data via Visa Commercial Solutions Experience portal.

Before you use this functionality:

- Contact your financial institution to request enhanced level 3 credit card transaction data for hotel stays.
- Map merchant category codes to your expense items.

https://doc.workday.com/release-notes/en-us/finexp/8647155.html

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Visa Level 3 Hotel Data for Expense Credit Cards, cont.

Additional Considerations

Commodity Code

- Daily Room Rate
- Health Club Charges
- If Purchase ID
- Line Item Sub Total
- Merchant Service Description
- No Show Indicator
- Prepaid Expenses Amount
- Sequence Number
- Source Amount
- Total Business Center Charges

What do I need to do

Then:

- Select the Automatically Populate Itemization for Level 3 Credit Card Transaction Data check box on your hotel expense items.
- Map expense items to the relevant Visa product codes. If you don't map to product codes, Workday still automatically creates expense lines but Workday doesn't automatically populate the lines with expense items. If you do map to product codes, Workday automatically generates expense report lines and automatically populates the lines with mapped expense items.
- You need to manually populate itemization data when you don't have level 3 credit card transaction data, or when you manually create an expense.
- For added efficiency, Workday recommends enabling expense item defaulting.

https://doc.workday.com/release-notes/en-us/finexp/8647155.html

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Visa Level 3 Hotel Data for Expense Credit Cards, cont.

Additional Considerations

- Total Charges Amount
- Total Folio Cash Advances
- Total Food/Beverage Charges
- Total Gift Shop Purchases
- Total Laundry Charges
- Total Mini-bar Charges
- Total Movie charges
- Total Non-Room Charges
- Total Room Tax Amount
- Total Tax Amount
- Total Telephone Charges
- Total Valet Parking Charges

What happens if I do nothing

If you already subscribe to enhanced visa level 3 data, you can report on this data to analyze your hotel spend.

https://doc.workday.com/release-notes/en-us/finexp/8647155.html

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Visa Level 3 Hotel Data for Expense Credit Cards, cont.

Additional Considerations

Workday also adds new Visa Product Codes that you can use in Itemization Mapping. If your organization uses more than one network, you can map both Visa and MasterCard product codes to the same expense item. Workday enables you to sort and search product codes if you've selected the Automatically Populate Itemization for Level 3 Credit Card Transaction Data check box. Workday displays a new icon on expense report lines for transactions with Visa level 3 hotel data. Note: Workday doesn't automatically generate itemization lines when you use these web services to create expense reports that include level 3 credit card transaction data:

- Submit Expense Report for Applicant
- Submit Expense Report for Non-Worker
- Submit Expense Report for Worker

However, you can still use these web services to enter data and create itemization lines.

https://doc.workday.com/release-notes/en-us/finexp/8647155.html

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Setup required

Visa Level 3 Hotel Data for Expense Credit Cards

Impact analysis

Before the release	After the release
The Visa Commercial Format 4.4 (VCF 4) scrubbed integration template did not support mapping both Visa and MasterCard product codes to the same expense item, and sorting or searching product codes was not enabled. Additionally, there was no icon to indicate Visa level 3 hotel data transactions on expense report lines	With this update, you can now map both Visa and MasterCard product codes to the same expense item if your organization uses multiple networks. You can also sort and search product codes when the "Automatically Populate Itemization for Level 3 Credit Card Transaction Data" option is selected. A new icon will be displayed on expense report lines for Visa level 3 hotel data transactions.

Impact description
Workday’s update enhances the Visa Commercial Format 4.4 (VCF 4) scrubbed integration template, enabling the mapping of both Visa and MasterCard product codes to the same expense item, and adding functionality for sorting, searching, and visual indicators for Visa level 3 hotel data transactions

https://doc.workday.com/release-notes/en-us/finexp/8647155.html

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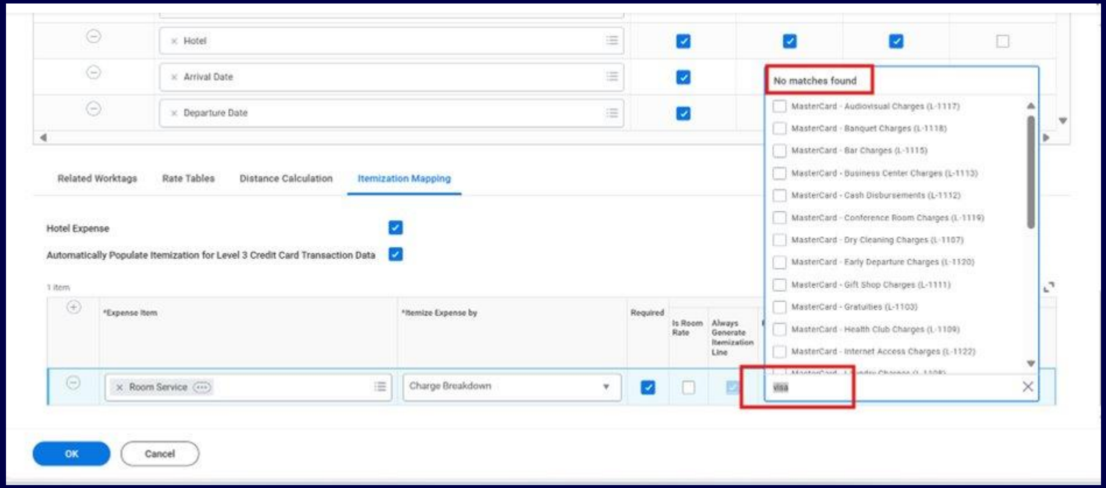
Setup required

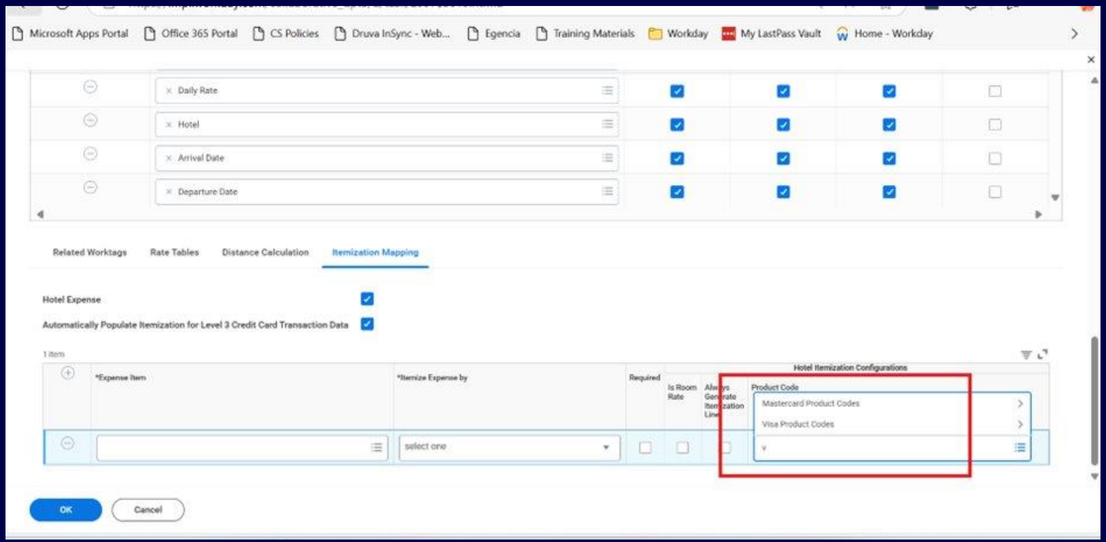
VISA Level 3 Hotel Data for Expense Credit Card

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/finexp/8647155.html

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Population Eligibility for TSM and FAH NSLDS Transaction Outbound Integration.

What's changing

Workday now supports configurable eligibility criteria for integrations based on the TSM and FAH NSLDS Transaction Outbound template, enabling you to better define which students to include in the integration output files. This provides additional filtering of the students you define in the integration launch criteria.

Additional considerations

- Workday adds a new TSM and FAH NSLDS Transaction Outbound Data (Unfiltered) data initialization service (DIS) to the TSM and FAH NSLDS Transaction Outbound integration template.

What do I need to do

• Select Integration System > Configure Integration Services from the related actions menu of your TSM and FAH NSLDS Transaction Outbound integration.

• Enable the DIS that best meets your needs: • TSM and FAH NSLDS Transaction Outbound Data (Filtered)

• TSM and FAH NSLDS Transaction Outbound Data (Unfiltered)

• To filter integration data further, select Integration System > Configure Integration Population Eligibility from the related actions menu of your integration. • Select a boolean field from the Filter External Field prompt. Note: If you select a non-boolean field, your integration output will be blank.

https://doc.workday.com/release-notes/en-us/stufad/7471668.html

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Population Eligibility for TSM and FAH NSLDS Transaction Outbound Integration, cont.

Additional considerations

- The new DIS has these launch parameters:
  - Transfer Student Monitoring and Financial Aid History Selection
  - OPEID
  - Branch Code
- For clarity, Workday renamed the TSM and FAH Batch Inform File Outbound Data DIS to TSM and FAH NSLDS Transaction Outbound Data (Filtered).

What do I need to do

Grant your Integration System User access to any additional security domains required for the Filter External Field you select.

Note: When reporting Enrollment Begin Date to NSLDS, Workday uses the Period Start Date of the earliest financial aid period record for which the student has a projected or actual load status other than Not Enrolled. If this date is more than 90 days before the current date, NSLDS won’t monitor the student even though the integration adds a Transfer Monitoring Date to their financial aid record.

https://doc.workday.com/release-notes/en-us/stufad/7471668.html

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Population Eligibility for TSM and FAH NSLDS Transaction Outbound Integration, cont.

What happens if I do nothing

If you don't change your DIS, your TSM and FAH NSLDS Transaction Outbound integrations will continue to use theTSM and FAH NSLDS Transaction Outbound Data (Filtered) integration service. When you launch existing integrations, the output file will contain all students under the OPEID number and branch code you select.

https://doc.workday.com/release-notes/en-us/stufad/7471668.html

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Setup required

Population Eligibility for TSM and FAH NSLDS Transaction Outbound Integration

Impact analysis

Before the release	After the release
The eligibility criteria for integrations based on the TSM and FAH NSLDS Transaction Outbound template were limited, offering less control over which students were included in the integration output files, which could result in broader or unintended selections.	With this update, configurable eligibility criteria are introduced for the TSM and FAH NSLDS Transaction Outbound template, allowing better definition of which students are included in the integration output files. Additionally, a new data initialization service (DIS) is added, with launch parameters for Transfer Student Monitoring and Financial Aid History Selection

Impact description
Workday's update provides enhanced filtering capabilities for the TSM and FAH NSLDS Transaction Outbound template, enabling configurable eligibility criteria and more precise student selection in integration output files, along with renaming of the DIS for clarity

https://doc.workday.com/release-notes/en-us/stufad/7471668.html

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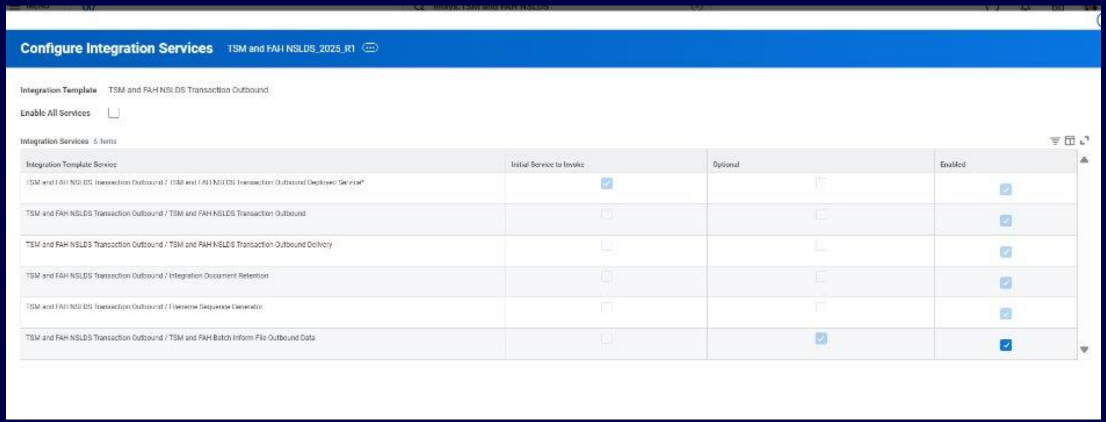
Setup required

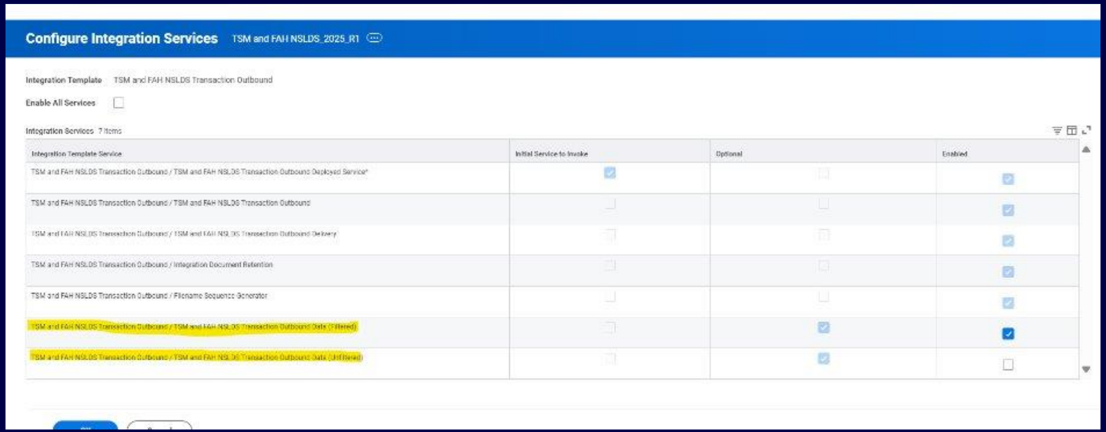
Population Eligibility for TSM and FAH NSLDS Transaction Outbound Integration

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/stufad/7471668.html

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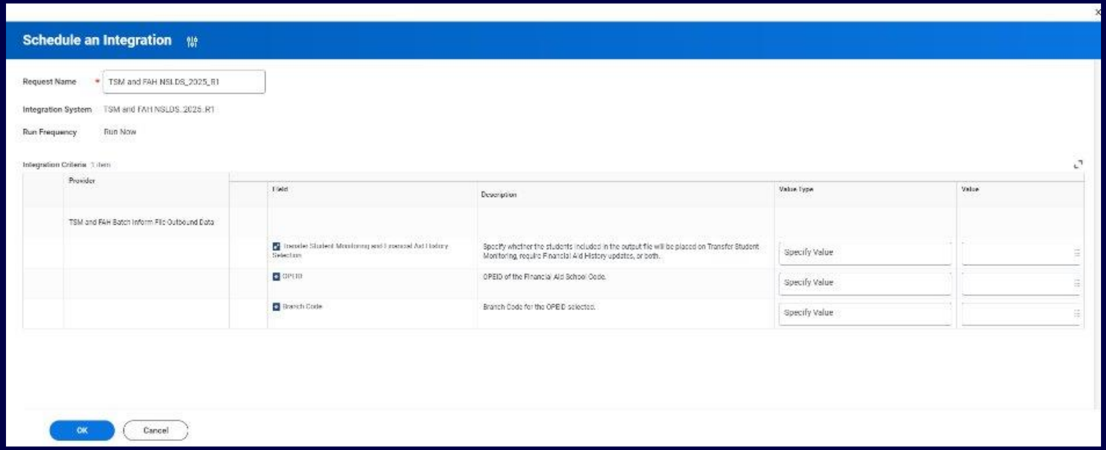
Setup required

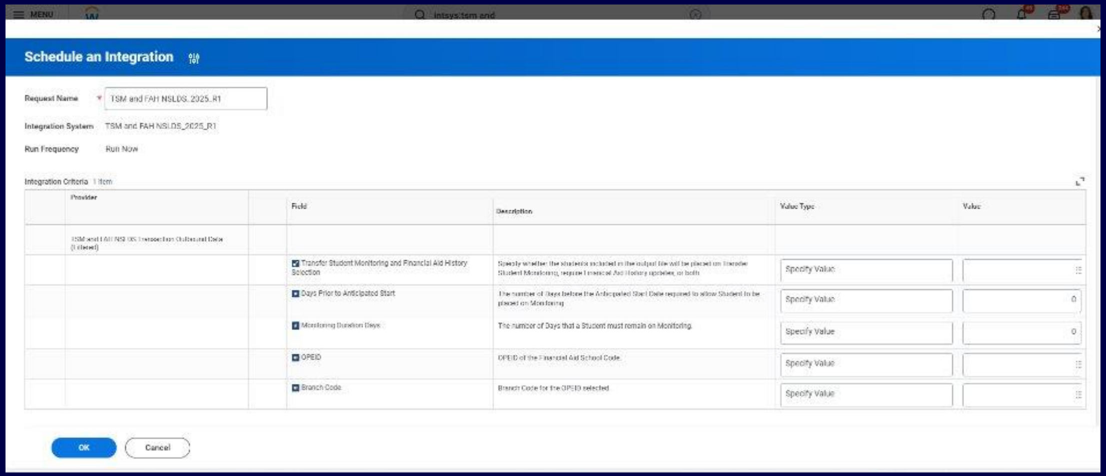
Population Eligibility for TSM and FAH NSLDS Transaction Outbound Integration, cont.

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/stufad/7471668.html

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OPM Connector: eOPF for EDF and SF-50

What's changing

Workday delivers the OPM Connector: eOPF. This new connector automates the process of extracting your HR data for Federal civilian employees to submit to the Office of Personnel Management (OPM). This connector is specifically designed to support our US Federal Agency customers for the Employee Data Feed (EDF) and the SF-50 Notification of Personnel Action form, based on the OPM's Electronic Official Personnel Folder (eOPF) Interface Control Document Employee Data Feed (EDF) and Form Data Feed, latest update 5.2 from July 2021.

What do I need to do

Manage: Organization Integration

- Person Data: Birth Place
- Person Data: Citizenship Status
- Person Data: Date of Birth
- Person Data: Disabilities
- Person Data: Emergency Contacts
- Person Data: Ethnicity
- Person Data: Gender
- Person Data: Government IDs
- Person Data: Home Contact Information

https://doc.workday.com/release-notes/en-us/hreg/8706012.html

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OPM Connector: eOPF for EDF and SF-50, cont.

What do I need to do

- Person Data: ID Information
- Person Data: Institutional Contact Information
- Person Data: Marital Status
- Person Data: Military Status
- Person Data: Name
- Person Data: Nationalities
- Person Data: Personal Data
- Person Data: Personal Information
- Person Data: Preferred Name
- Reports: Personnel Action Request
- Worker Data: Beneficiaries and Dependents

https://doc.workday.com/release-notes/en-us/hreg/8706012.html

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OPM Connector: eOPF for EDF and SF-50, cont.

What do I need to do

- Worker Data: Benefit Elections
- Worker Data: Compensation
- Worker Data: Compensation by Organization
- Worker Data: Leave of Absence
- Worker Data: Organization Information
- Worker Data: Public Worker Reports
- Worker Data: Staffing
- Worker Data: Workers
- Configure the template on the Create Integration System task.
- Set up integration attributes.
- Set up integration sequence generators.
- Enter the relevant integration launch parameters.
- Submit the file to OPM based on your data transfer setup.

https://doc.workday.com/release-notes/en-us/hreg/8706012.html

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OPM Connector: eOPF for EDF and SF-50, cont.

What happens if I do nothing

You can't use the OPM Connector: eOPF integration to extract your HR data for Federal civilian employees to send these files to the Office of Personnel Management (OPM):

- Employee Data Feed
- SF-50 Notification of Personnel Action

https://doc.workday.com/release-notes/en-us/hreg/8706012.html

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OPM Connector: eOPF for EDF and SF-50

Impact analysis

Before the release	After the release
Workday does not have a direct template to extract HR data for for Federal civilian employees to submit to the Office of Personnel Management (OPM)	Workday delivers the new OPM Connector: eOPF template that enables you to send these output files to the Office of Personnel Management (OPM): Employee Data Feed (EDF), that supports the creation and maintenance of employee eOPF accounts and information. This integration will include records for new employees or updates to existing employees. SF-50 Notification of Personnel Action, that includes completed personnel action requests for employees.

Impact description
Workday delivers the OPM Connector: eOPF. This new connector automates the process of extracting your HR data for Federal civilian employees to submit to the Office of Personnel Management (OPM). This connector is specifically designed to support our US Federal Agency customers for the Employee Data Feed (EDF) and the SF-50 Notification of Personnel Action form, based on the OPM’s Electronic Official Personnel Folder (eOPF) Interface Control Document Employee Data Feed (EDF) and Form Data Feed, latest update 5.2 from July 2021.

https://doc.workday.com/release-notes/en-us/hreg/8706012.html

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Setup required

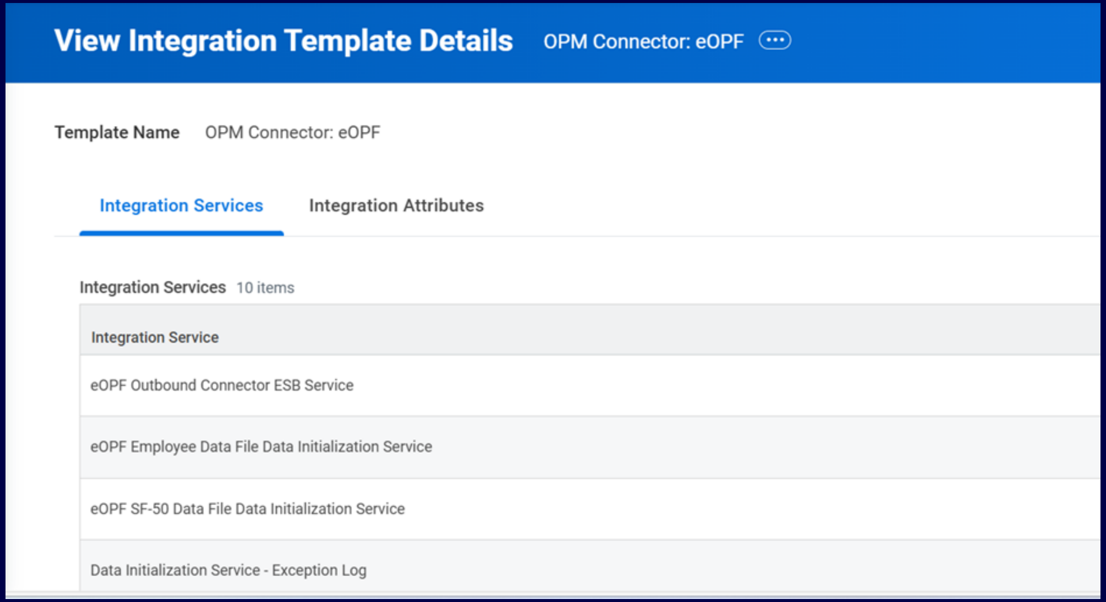
OPM Connector: eOPF for EDF and SF-50

Impact Analysis

Before the release

- N/A

After the release



https://doc.workday.com/release-notes/en-us/hreg/8706012.html

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Integration Attributes for Core Connector: Assign Organization Inbound and Core Connector: Job Profile

What's changing

Workday updates the *Core Connector: Assign Organization Inbound* and *Core Connector: Job Profile and Job Family integrations* to provide you with more configurability.

What do I need to do?

Complete the **Configure Integration Service** task and select the relevant attributes for these integrations:

- Core Connector: Job Profile and Job Family
- Core Connector: Assign Organization Inbound

What happens if I do nothing?

On existing integration systems, you'll see the new Integration Audit Configuration service. The service is view-only, and isn't enabled unless you complete the **Configure Integration Service task**. There is no change in functionality until you configure the integration services.

On new integration systems, the *Integration Audit Configuration service* is automatically enabled.

https://doc.workday.com/release-notes/en-us/hrcore/8706092.html

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Integration Attributes for Core Connector: Assign Organization Inbound and Core Connector: Job Profile, cont.

Additional considerations

Workday delivers a new Integration Audit Configuration integration service on these integrations:

- Core Connector: Job Profile and Job Family
- Core Connector: Assign Organization Inbound

This integration service is automatically enabled. It enables you to configure these Integration Attributes on the **Configure Integration Attributes** task:

- *Suppress Messages Audit*: Disables generation of processing related data in the Messages Audit file.
- *Suppress Audit Reports*: Disables generation of the Data Changes Audit and Diagnostic Audit files.

If you create a new integration system using those connectors, the Integration Audit Configuration service is automatically enabled.

https://doc.workday.com/release-notes/en-us/hrcore/8706092.html

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Integration Attributes for Core Connector: Assign Organization Inbound and Core Connector: Job Profile

Impact analysis

Before the release	After the release
Integration systems using the template Core Connector: Job Profile and Job Family and Core Connector: Assign Organization Inbound did not have options to supress Message Audit and Audit reports on Integration event .	Developer can now eanble Integration Audit Configuration service on Integartion and further configure below : • Suppress Messages Audit: Disables generation of processing related data in the Messages Audit file. • Suppress Audit Reports: Disables generation of the Data Changes Audit and Diagnostic Audit files.

Impact description
On new integration systems using the template Core Connector: Job Profile and Job Family and Core Connector: Assign Organization Inbound , the Integration Audit Configuration service is automatically enabled.

https://doc.workday.com/release-notes/en-us/hrcore/8706092.html

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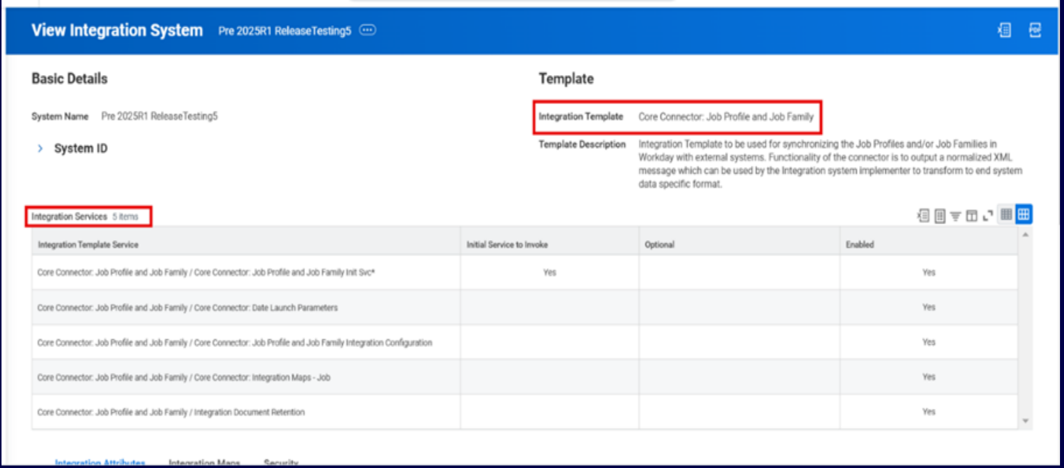
Setup required

Integration Attributes for Core Connector: Assign Organization Inbound and Core Connector: Job Profile

Impact Analysis

Before the release



After the release

https://doc.workday.com/release-notes/en-us/hrcore/8706092.html

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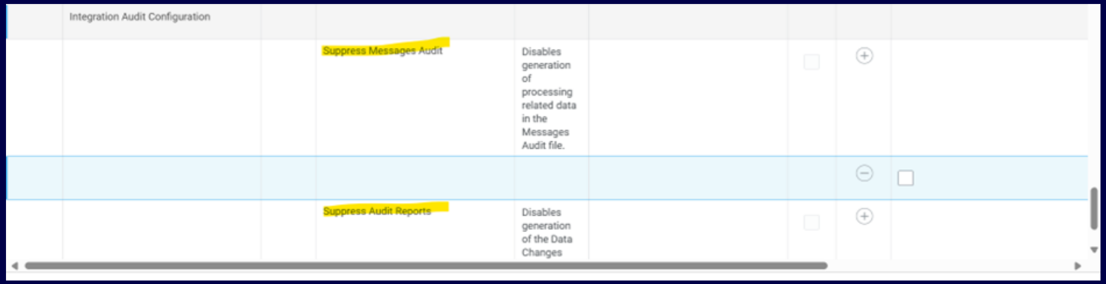
Integration Attributes for Core Connector: Assign Organization Inbound and Core Connector: Job Profile

Impact Analysis

Before the release

After the release



https://doc.workday.com/release-notes/en-us/hrcore/8706092.html

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Additional Payroll Data Authentication and Authorization

What's changing

Workday updated the authentication and authorization processes for Additional Payroll Data to use the Global Payroll REST API.

Additional considerations

With this release, Workday uptakes the Authorizations REST API in the Global Payroll v1 REST web service (secured to the new View: Global Payroll Authorizations domain in the Global Payroll Connect functional area) to ensure vendor authentication of JWT claims for Additional Payroll Data.

What do I need to do

Work with your third-party payroll vendor to ensure Additional Payroll Data authorization requests are made using calls to the Authorizations REST API in the Global Payroll v1 REST web service.

See the REST API Changelog link under Related Information.

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/payexternal/8356200.html

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Additional Payroll Data Authentication and Authorization, cont.

Additional considerations

Workday moves these JWT claims for GET and DELETE into query parameters and for POST into request bodies for all vendors:

- payGroupCode
- employeeID
- countryISOCode
- viewOnly

Workday also moves these JWT claims to query parameters or body request for metadata vendors:

- positionID
- PayCompanyCode
- subPayCompanyCode

https://doc.workday.com/release-notes/en-us/payexternal/8356200.html

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Additional Payroll Data Authentication and Authorization, cont.

Additional considerations

- subPayGroupCode
- subCountryISOCode

The API processes the vendor request and returns the user's authorization status in the response.

Workday also improve the ID management flexibility for vendors, enabling them to configure ID mappings more efficiently without impacting existing API agreements.

These new external payroll attributes are now available in the external payroll configurations, enabling vendors to map their unique ID types directly within Workday.

https://doc.workday.com/release-notes/en-us/payexternal/8356200.html

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Additional Payroll Data Authentication and Authorization, cont.

Additional considerations

- Pay Company ID Type
- Pay Group ID Type

Vendors can now store and configure these ID types in Workday and map ID value types to either the Pay Company ID Type or Pay Group ID Type attributes based on their requirements.

- Workday ID (WID)
- Reference ID (REF)
- Organization Code (ORG)

To configure these mappings, use the appropriate task:

- Metadata vendors: Use the Edit External Payroll Vendor (Workday Owned) task.
- Audited vendors: Use the Edit External Payroll Vendor Mapping task.

https://doc.workday.com/release-notes/en-us/payexternal/8356200.html

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Setup required

Additional Payroll Data Authentication and Authorization

Impact analysis

Before the release	After the release
No Setup to update the JWT Claims Query parameter request.	Setup is available to update the JWT Claims Query parameter request.for Get Post and Delete for Global Payroll v1 REST API. Work with your third-party payroll vendor to ensure Additional Payroll Data authorization requests are made using calls to the Authorizations REST API in the Global Payroll v1 REST web service.

Impact description
No Impact

https://doc.workday.com/release-notes/en-us/payexternal/8356200.html

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Advanced Logging Option for the Absence Third-Party Calendar Integration

What’s changing

Workday continues to enable you to configure integrations with Google Calendar and Microsoft Outlook to automatically send time off events for approved time off entered in Workday to user accounts in corporate calendar applications. This enables you to easily provide workers with scheduling data outside of Workday.

With this update, Workday enables you to generate additional logging that contains more detailed troubleshooting information about the Absence Third-Party Calendar Integration. Use Advanced Logging primarily as a debugging tool to help you narrow down problem areas when the integration is failing with errors.

You can enable advanced logging temporarily to help troubleshoot integration errors. This enhancement helps your IT department understand core issues and assist in resolving integration errors faster.

What do I need to do

To optimize performance, Workday disabled this option by default. Select this option only to troubleshoot integration errors.

After you select the Advanced Logging Enabled check box and run the integration, Workday disables this option automatically 24 hours after its last run. This doesn't impact the overall integration, and the integration continues to generate the regular sync_log.csv file each time it runs but discontinues the sync_detail_log.csv generation.

If you want to continue using advanced logging, you need to select the Advanced Logging Enabled check box for subsequent integration runs.

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/abs/7682884.html

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Advanced Logging Option for the Absence Third-Party Calendar Integration, cont.

Additional Considerations

Workday adds an Advanced Logging Enabled check box to the Options section of the Review and Apply page on the Configure Absence Third-Party Calendar Integration task that enables you to generate an additional advanced logging file called sync_detail_log.csv.
Workday also updates the structure of the Synchronization_Failures_Log.csv file for the Google Calendar integration to add these new columns:
* Received Details
* Sent Details
This new structure includes details from the JSON log files and more details about the error messages within the same file.

https://doc.workday.com/release-notes/en-us/abs/7682884.html

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Setup required

Advanced Logging Option for the Absence Third-Party Calendar Integration

Impact analysis

Before the release	After the release
No Setup to have an advance logging in case of troubleshooting required .	You can enable advanced logging temporarily to help troubleshoot integration errors. User can generate an additional advanced logging file called sync_detail_log.csv to narrow down problem areas when the integration is failing with errors

Impact description
No Impact but additional feature for integration failure troubleshooting .

https://doc.workday.com/release-notes/en-us/abs/7682884.html

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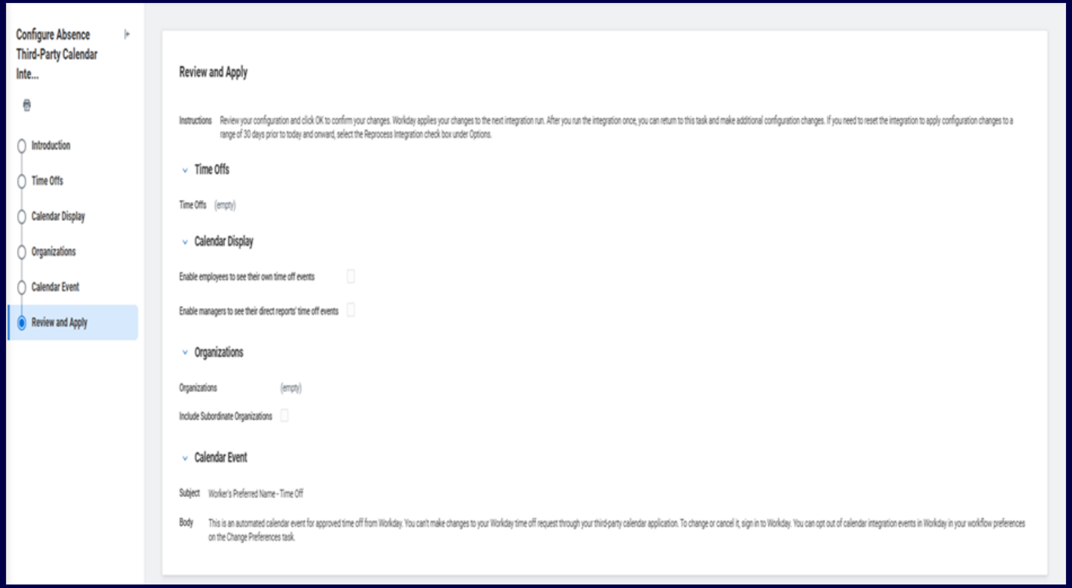
Setup required

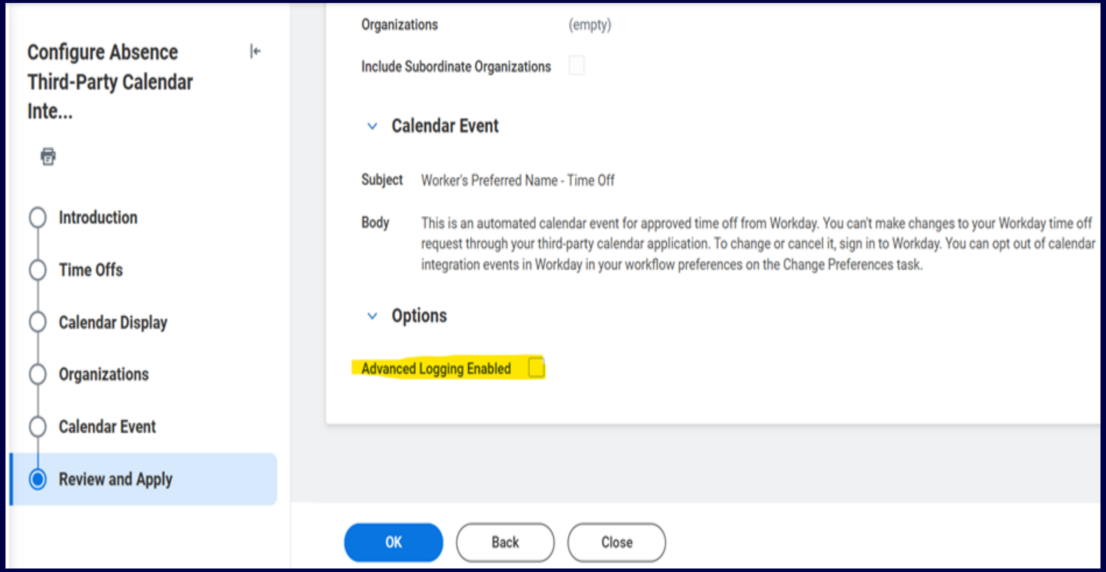
Advanced Logging Option for the Absence Third-Party Calendar Integration

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/abs/7682884.html

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Inventory

[Back to table of contents]

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Ability to Restrict Access to Ad Hoc Inventory Put Aways

What’s Changing

With Workday 2025 R1 workday delivers the ability to restrict access to ad hoc inventory put away transactions to ensure that task users have the necessary awareness of item costs and worktags included on these transactions. Workday helps your users distinguish ad hoc put-away transactions from order-based put-away transactions.

Additional Considerations

Workday delivers a new Ad Hoc Inventory Put Away task (secured to the Inventory Put-Away Event business process) to separate the ad hoc put away task from the standard Put Away Inventory task. This enables you to secure different users to the different put-away tasks.

What do I need to do

Review the business process for Inventory Put-Away Event and confirm security access to the new ad hoc task. Workday performs a conversion to copy the Put Away Inventory initiating action to the new Ad Hoc Inventory Put Away task.

What happens if I do nothing

There is no impact.

https://doc.workday.com/release-notes/en-us/sminv/8402593.html

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Ability to Restrict Access to Ad Hoc Inventory Put Aways, cont.

Additional Considerations

- Workday now removes the Ad Hoc Put-Away option from the Put Away Inventory task. You can only process order-based transactions using the Put Away Inventory task.

Reporting

- Workday delivers a new Put Away Transaction Origin field on the View Inventory Transaction page for put away transactions.
- Workday delivers a new Put Away Transaction Origin report field on the Inventory Transaction business object (secured to the Public Reporting Items domain) that you can use in custom reports and condition rules for all put away transactions.

https://doc.workday.com/release-notes/en-us/sminv/8402593.html

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Ability to Restrict Access to Ad Hoc Inventory Put Aways

Impact analysis

Before the release	After the release
Before this update Ad Hoc Inventory Put Away was available in Put Away task only.	There is new Ad Hoc Inventory Put Away task.

Impact description
With this feature users with the necessary knowledge of item costs and applicable worktags can have access to the appropriate put away task, which will ensure better control on inventory put away transactions.

https://doc.workday.com/release-notes/en-us/sminv/8402593.html

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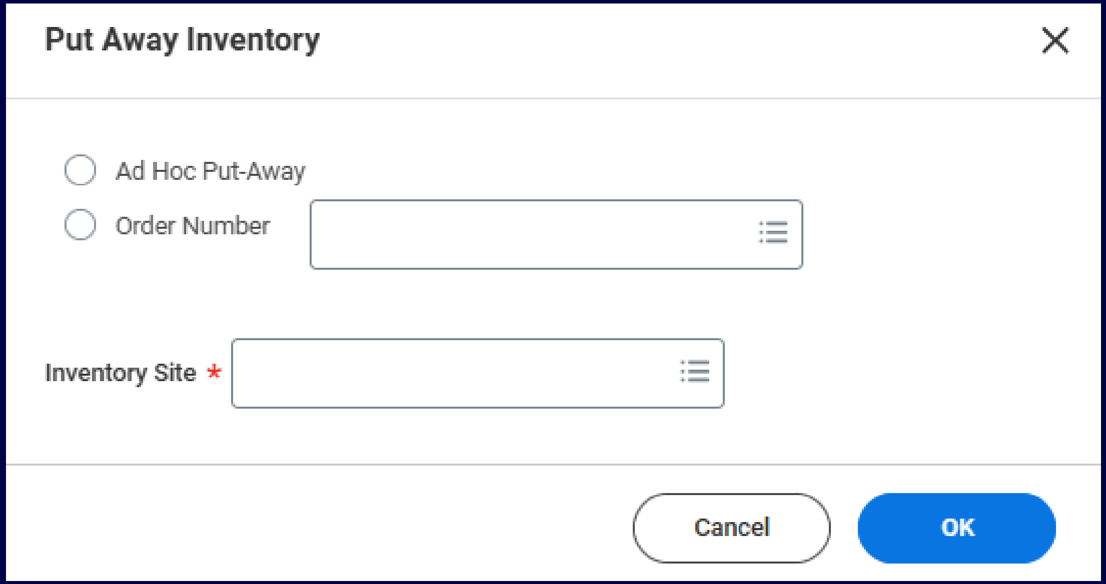
Automatically Available

Ability to Restrict Access to Ad Hoc Inventory Put Aways

Impact analysis

Before the release



After the release

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Wave Picking

What's Changing

With this release, Workday provides the ability to gather a group of pick lists together within an inventory site.

Additional Considerations

- Workday delivers two new tasks to create and view inventory waves: Create Inventory Waves and View Inventory Waves
- Create Inventory Waves task groups pick lists together by deliver-to location.

What do I need to do

- On the Maintain Inventory Site task, select the Use Directed Picking option to display all of the options, and select Enable Wave Picking.
- To configure the sequence generator, either use the Edit Tenant Setup - Financials task and configure the ID Generator for Inventory Waves prompt or the Edit Company ID Definitions task and configure the Default ID Generator for Inventory Waves field.

What happens if I do nothing

There is no impact.

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

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Wave Picking, cont.

Additional Considerations

- Need to enable Wave Picking option on Maintain Inventory Site task.
- New Sequence Generator can be added for these new Inventory Waves.
- Workday delivers a new Inventory Wave prompt to the Mass Assign and Print Pick Lists task that you can use to assign an inventory wave to a picking lists.
- Workday delivers a new Inventory Wave business object that you can use in custom reports.
- New Inventory Waves column to the Find Inventory Picking List report to display inventory waves associated with picking lists.

What do I need to do

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

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

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

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Setup required

Wave Picking

Impact analysis

Before the release	After the release
Before this update there was no option to group the picking list.	There is newly Create Inventory Waves task available to group the picking lists.

Impact description
This enables to group picking lists together to better organize and prioritize the inventory picking process, increasing the efficiency.

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

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Setup required

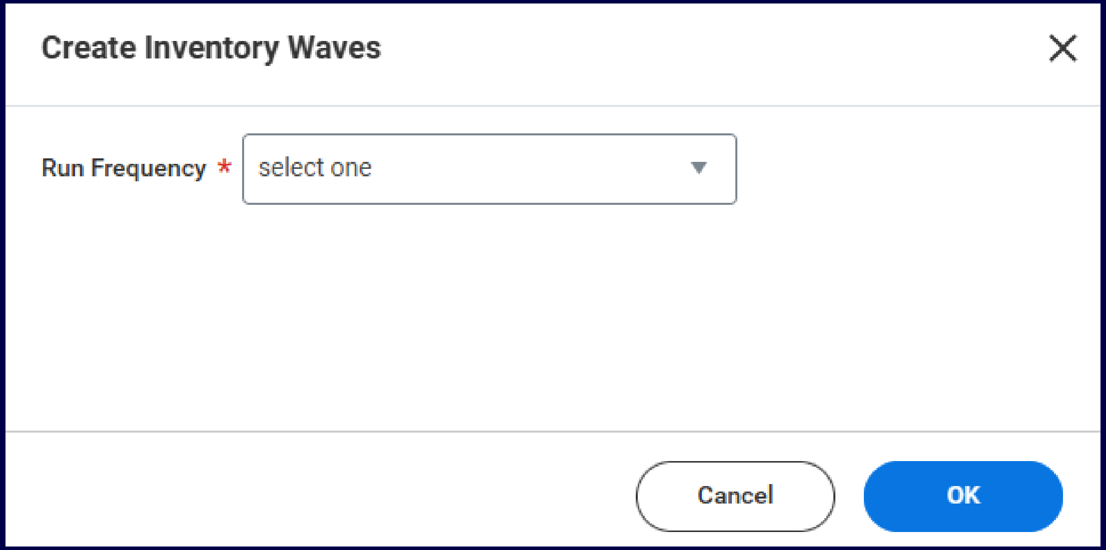
Wave Picking

Impact analysis

Before the release

N/A

After the release



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Mass Cancel Framework for Inventory Documents

What's Changing

With this release, Workday now enables to take mass action to cancel inventory transaction business documents in Workday, based on specified criteria. This new task helps to act on a significant volume of business documents which may have built up in the deployment, causing confusion or clutter.

Additional Considerations

New Cancel Inventory Documents type to the Mass Operations Management task that you can use to locate and take cancellation action on Goods Delivery, Inventory Count, Par Count and Quick Issue.

What do I need to do

- Create a segment security group with access to the new Mass Cancel Inventory Document security segment.
- Add the new security group of users to the Mass Operation Management domain.
- Access and run the Activate Pending Security Policy Changes task.

What happens if I do nothing

There is no impact.

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

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Mass Cancel Framework for Inventory Documents, cont.

What's Changing

These new data sources filters that you can use to access draft documents of inventory transactions: Goods Delivery Filter for Mass Cancel, Inventory Count Filter for Mass Cancel, Par Count Filter for Mass Cancel and Quick Issue Filter for Mass Cancel.

What do I need to do

- Create a custom report with filters for the respective document types.
- Run the Mass Operation Management task using the Cancel Inventory Documents type and the report you create in step 4.
- Once you complete the task Workday cancels documents that are in Draft status based on the selection of empty or nonempty line.
- Workday recommend you don't use a report in the Input Report prompt that filters documents for the current day.

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

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Mass Cancel Framework for Inventory Documents

Impact analysis

Before the release	After the release
Before this update there was no option to mass cancel the inventory transaction documents.	Option to mass cancel the inventory transaction documents.

Impact description
Workday now provides a good way to quickly discover, and act upon inventory transaction business documents from at a high volume, helping users easily clean up their unwanted data.

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

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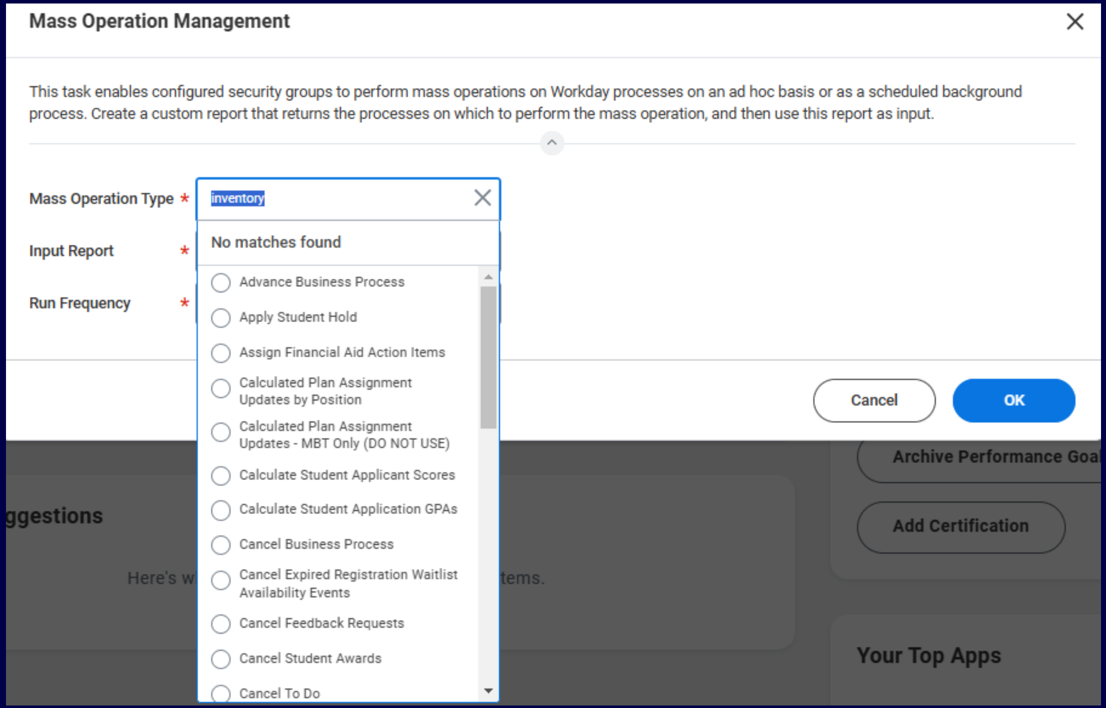
Setup required

Mass Cancel Framework for Inventory Documents

Impact analysis

Before the release



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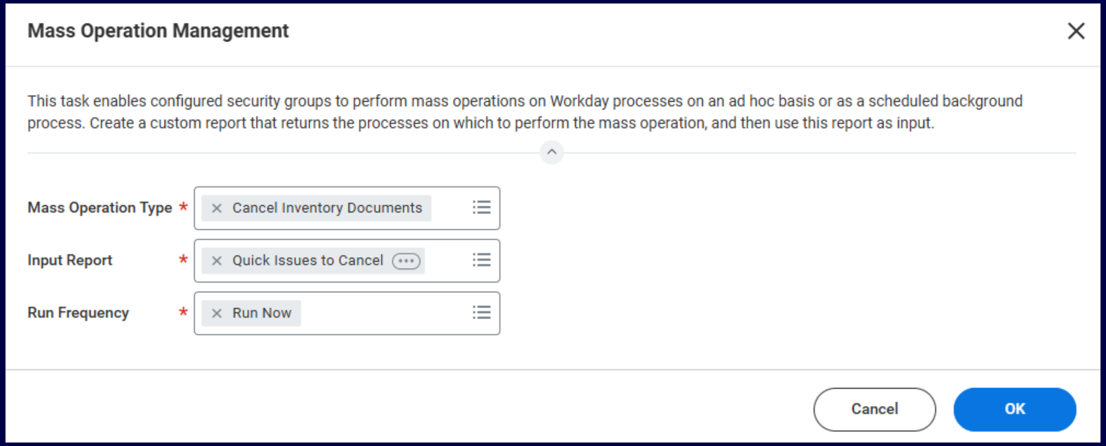

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Learning

Back to table of contents

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Hide Inactive Learning Content from Global Search

What's Changing

Workday now excludes all inactive learning content from the global search results for users with the Learning Admin access.

Additional Considerations

- If you mark a learning content as inactive, the content won't display for you in the global search results.
- Inactive content will still be visible in the Manage Learning Content standard report or other custom reports for learning content.

What do I need to do

This feature is automatically available.

What happens if I do nothing

Your global search results still won't show inactive learning content.

https://doc.workday.com/release-notes/en-us/lrn/8763064.html

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Hide Inactive Learning Content from Global Search

Impact analysis

Before the release	After the release
Before the 2025R1 release, Your global search results used to show learning content which are inactive.	Workday now excludes all inactive learning content from the global search results for users with the Learning Admin access. Your global search results will display only learning content that is active and available for your learners.

Impact description

- If you mark a learning content as inactive, the content won’t display for you in the global search results.
- Inactive content will still be visible in the **Manage Learning Content** standard report or other custom reports for learning content.
- This feature is automatically available and do not need any changes required in the tenant.

https://doc.workday.com/release-notes/en-us/lrn/8763064.html

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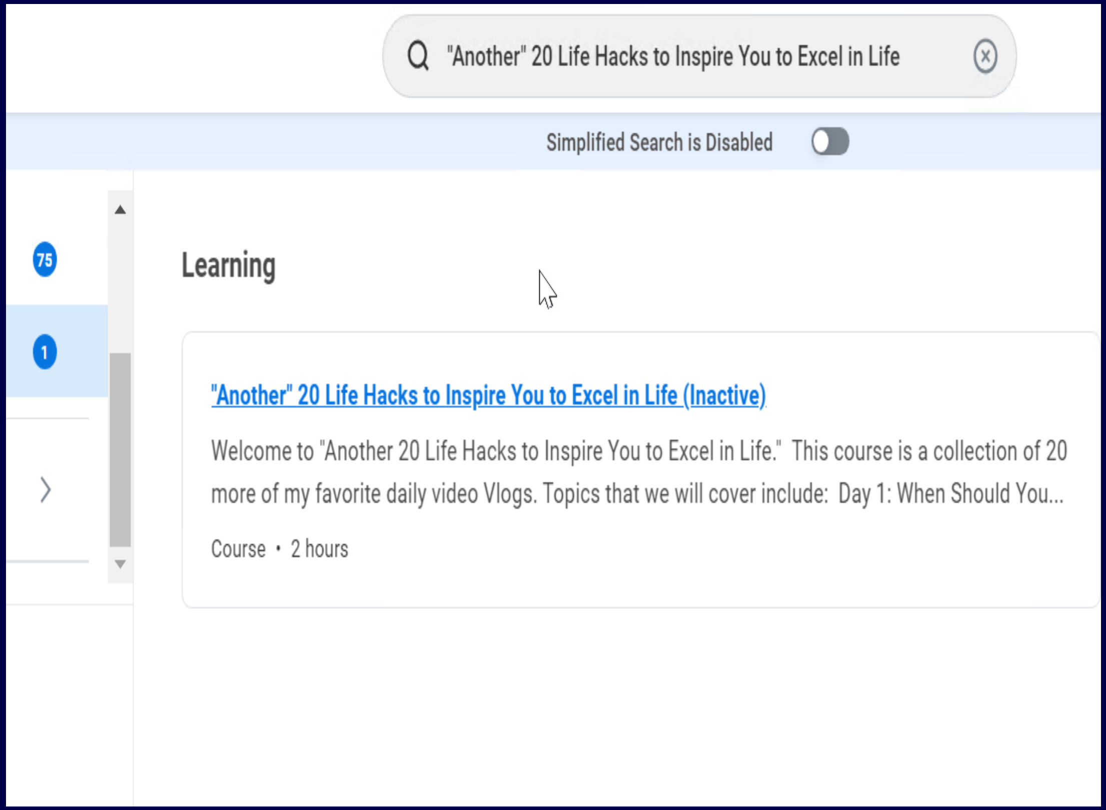
Automatically available

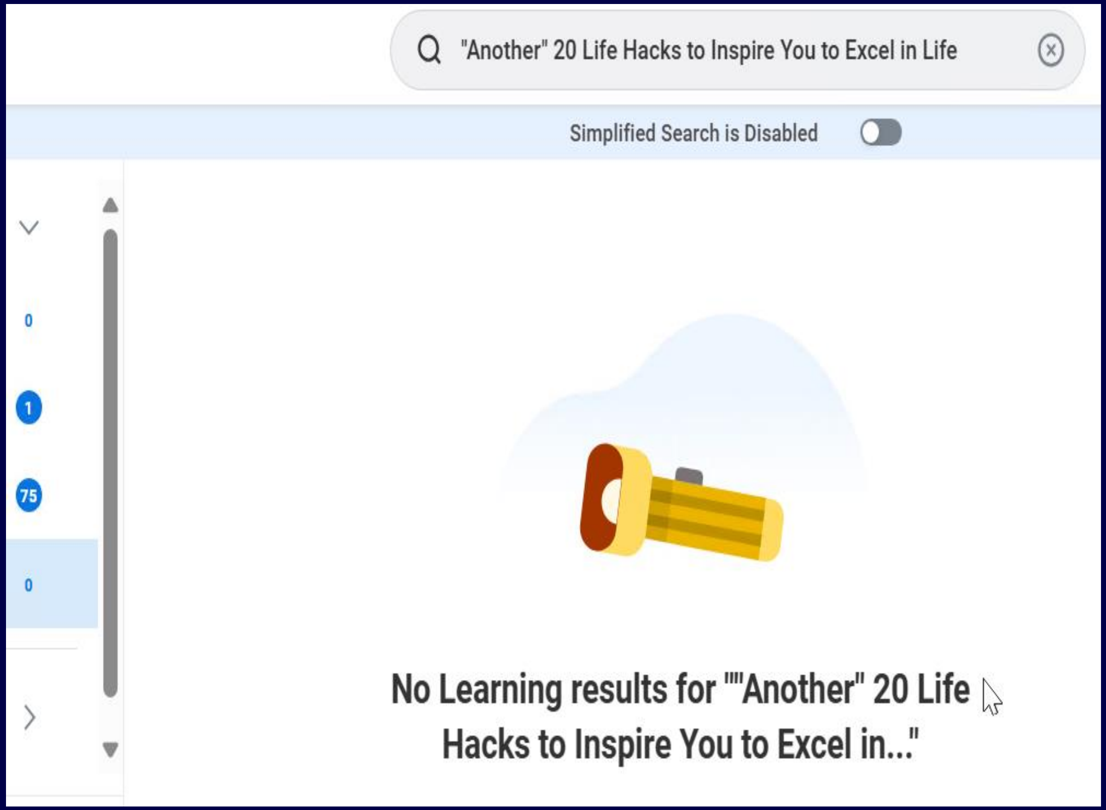
Hide Inactive Learning Content from Global Search

Impact analysis

Before the release



After the release



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Automatically available

AI Summarization of Content Feedback

What's Changing

- With this release, you can use Generative AI (GenAI) to summarize user feedback comments on learning content.
- Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement.

Additional Considerations

- Workday adds a new AI Summarized Feedback tab on the administrator view of the learning content. The new tab is secured to these domains:
  - Manage: Learning Content.
  - Self-Service: Learning Instructor.
  - Self-Service: On the Job Training.
  - Set Up: Learning Catalog.

What do I need to do

Summary of content feedback is automatically available, but to ensure you have access to it, the tenant must be opted in to Machine Learning and Activity Stream for internal content needs to be enabled

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/lrn/7818732.html

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AI Summarization of Content Feedback, cont.

Additional Considerations

- From the AI Summarized Feedback tab, administrators, assessors, and instructors with access to the learning content can use the Generate Summary button to generate a summary of the feedback comments in English.
- With this release, Workday also updates the Edit Tenant Setup - HCM task to add a Disable AI Summarized Feedback option. You can select this option to hide the AI Summarized Feedback tab.

Reporting:

Workday delivers these report fields on the Learning Content business object:

- AI Generated Feedback Summary.
- Feedback Summary.
- Feedback Summary Generated By.
- Feedback Summary Generated Date.
- Source Feedback Comments.

https://doc.workday.com/release-notes/en-us/lrn/7818732.html

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AI Summarization of Content Feedback, cont.

Additional Considerations

All the report fields are secured to these domains:

- Manage: Learning Content.
- Self-Service: Learning Instructor.
- Self-Service: On the Job Training.
- Set Up: Learning Catalog.

https://doc.workday.com/release-notes/en-us/lrn/7818732.html

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AI Summarization of Content Feedback

Impact analysis

Before the release	After the release
Before 2025 R1 release, Generative AI (GenAI) feature was not available, which provides feedback summary to administrators, assessors, and instructors.	With this release, you can use Generative AI (GenAI) to summarize user feedback comments on learning content. This feature helps you to surface the most valuable comments, quickly categorize feedback, and gain actionable insights to improve your learning content.

Impact description

- Workday add a new **AI Summarized Feedback** tab on the administrator view of the learning content.
- From the **AI Summarized Feedback** tab, administrators, assessors, and instructors with access to the learning content can use the **Generate Summary** button to generate a summary of the feedback comments in English.
- Note: Feedback summary is not available for external content.
- Once the summary is available, you can edit the result, save it or generate again on the **AI Summarized Feedback** tab. You can delete comments from the learner view so they don't appear in the summary again.

https://doc.workday.com/release-notes/en-us/lrn/7818732.html

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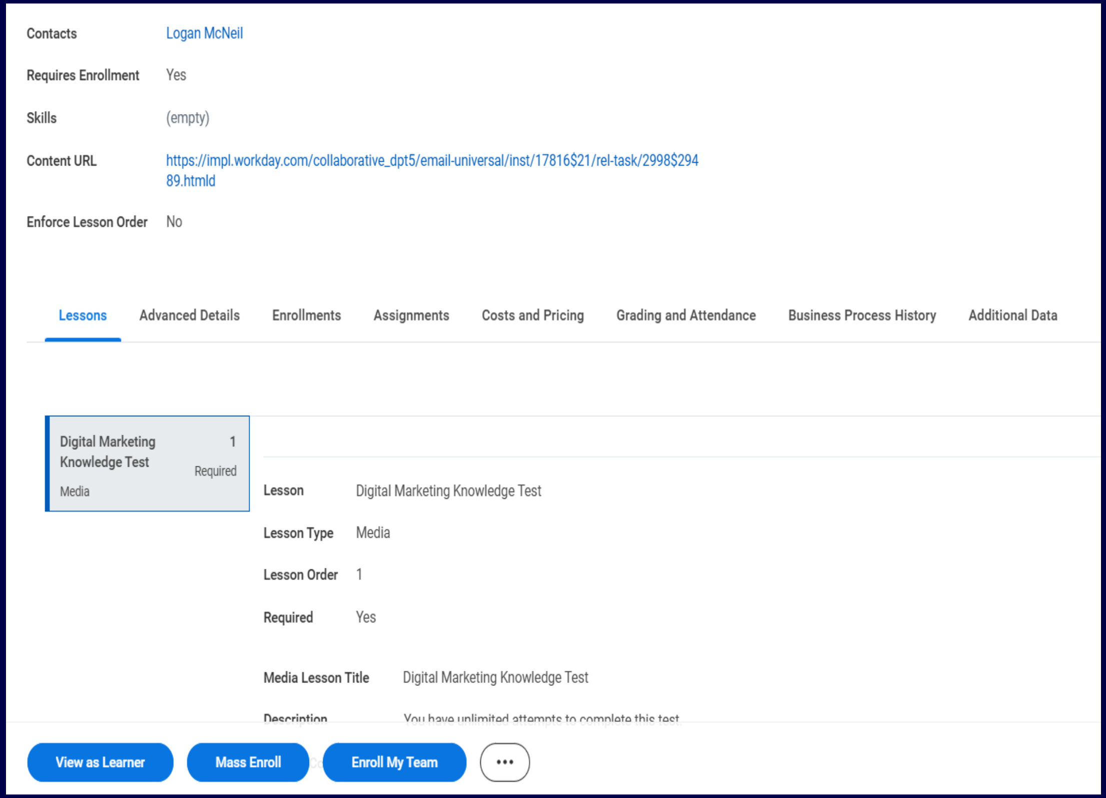
Automatically available

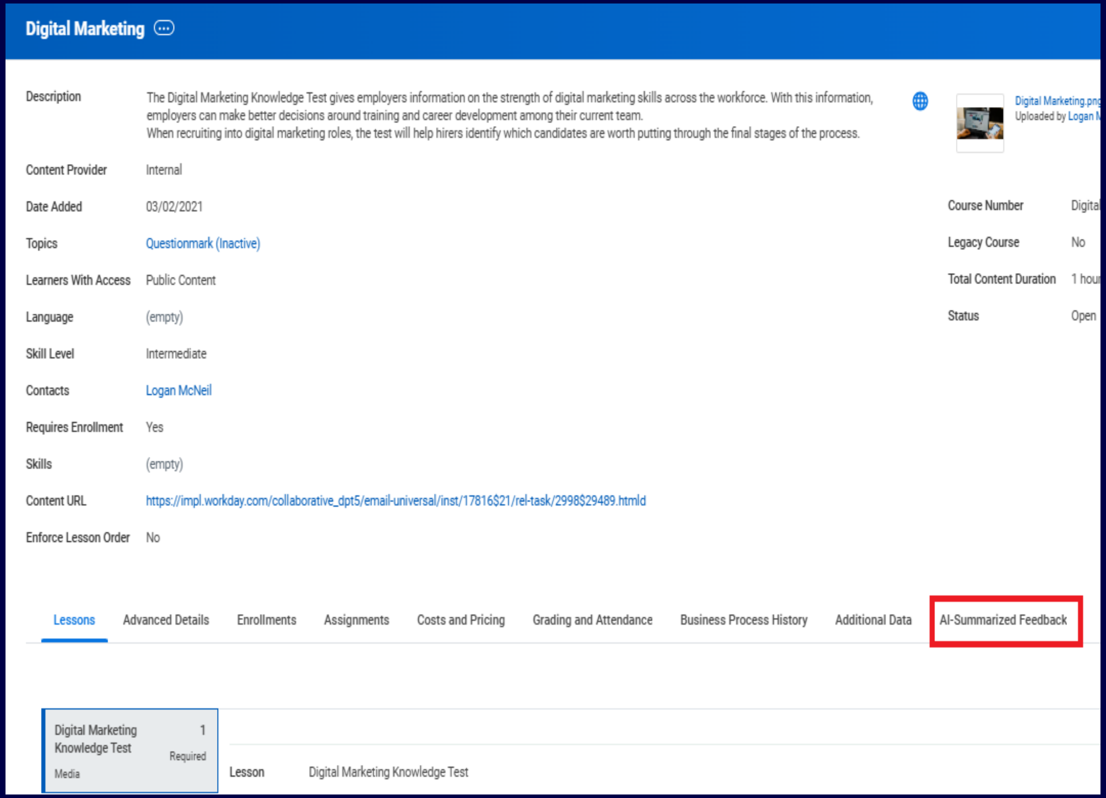
AI Summarization of Content Feedback

Impact analysis

Before the release



After the release



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Automatically available

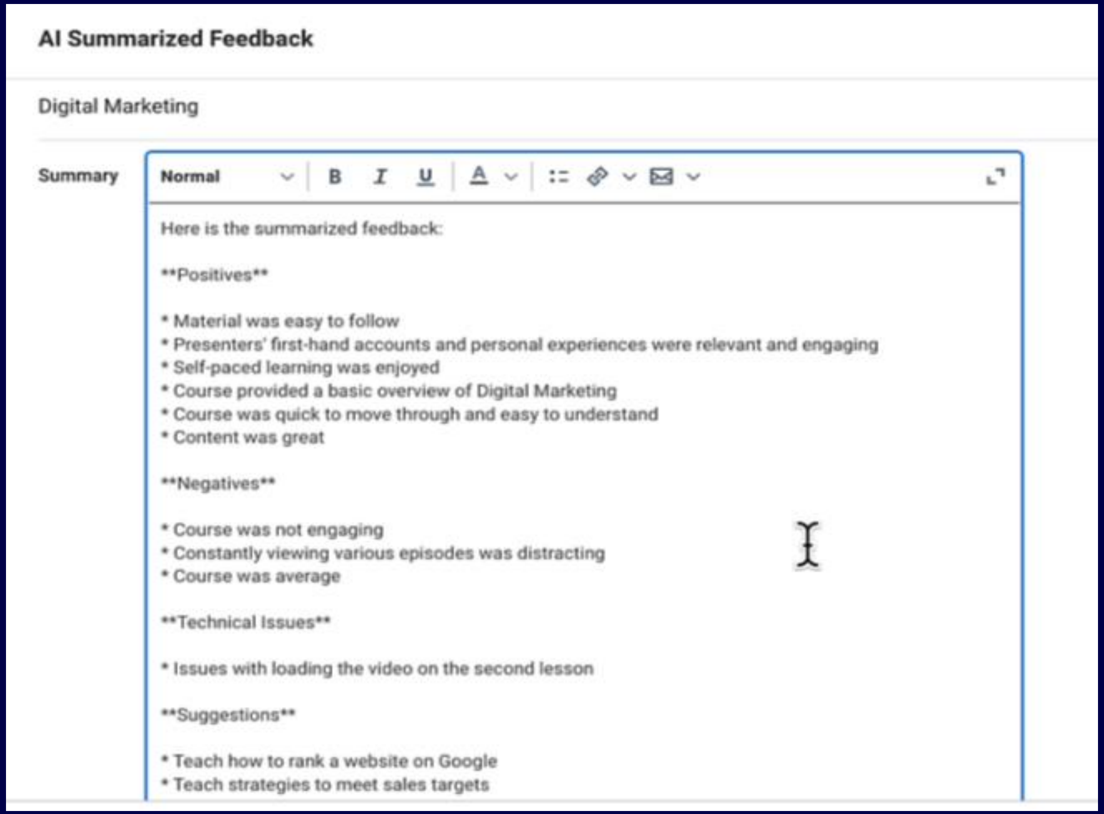
AI Summarization of Content Feedback

Impact analysis

Before the release

N/A

After the release



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Surveys Migration

What's Changing

Workday's Surveys feature no longer uses Presentation Services (also known as VPS). Workday now migrates the existing surveys to a new platform.

Additional Considerations

Self-Service: Take Surveys Domain

- Workday delivers a conversion that automatically enables the Modify permission on the Self-Service: Take Surveys domain to prevent any errors that might interrupt successful survey completion.

Survey User Interface

- When accessing all surveys, including existing surveys, your users will now find a modified user interface and survey completion message.
- You'll also find an additional preview completion page when previewing surveys.

What do I need to do

The surveys in the new platform are automatically available to your users.

What happens if I do nothing

Your users can still complete surveys without any interruptions.

https://doc.workday.com/release-notes/en-us/lrn/8632008.html

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Surveys Migration

Impact analysis

Before the release	After the release
Before 2025 R1 release, Workday's Surveys feature was using Presentation Services (also known as VPS)	With this release, Workday now migrates the existing surveys to a new platform.

Impact description
Your users can complete surveys securely without any interruptions, as surveys don't depend on the third-party platform. Workday delivers a conversion that automatically enables the *Modify* permission on the *Self-Service: Take Surveys* domain to prevent any errors that might interrupt successful survey completion. **Survey User Interface** When accessing all surveys, including existing surveys, your users will now find a modified user interface and survey completion message.

https://doc.workday.com/release-notes/en-us/lrn/8632008.html

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Automatically available

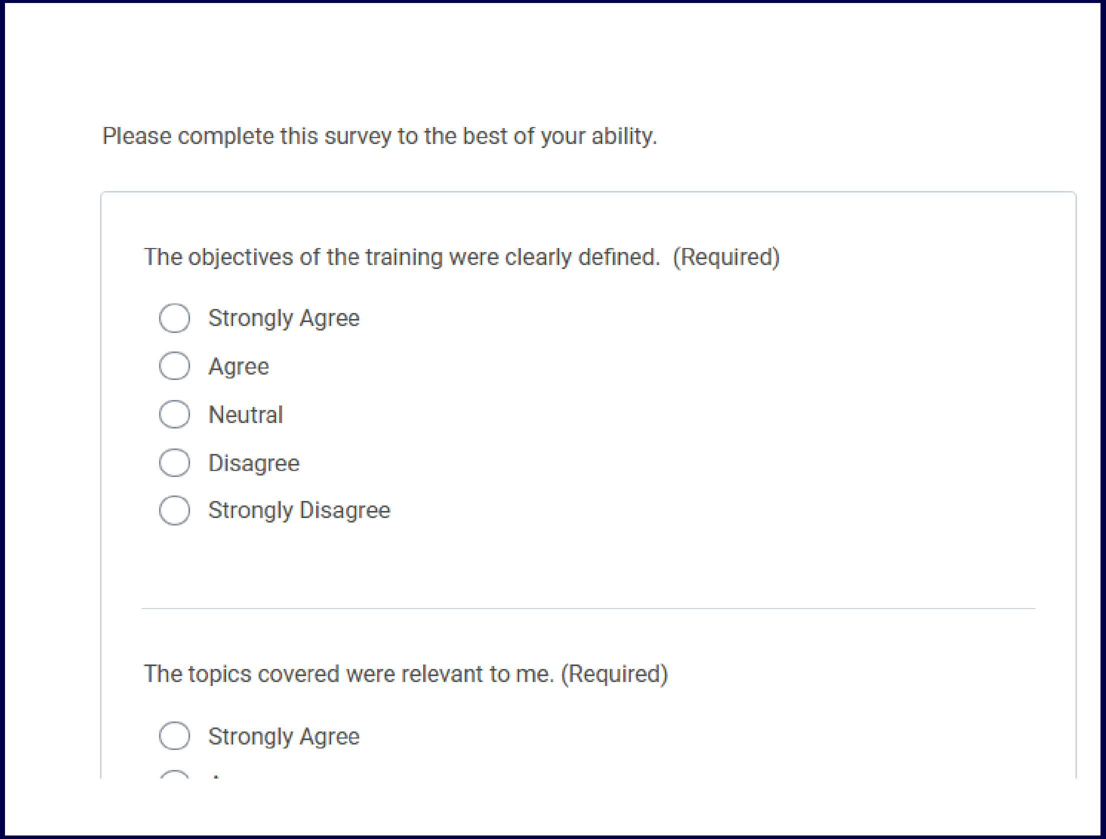
Surveys Migration

Impact analysis

Before the release

UI changes not available before the release

After the release



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Automatically available

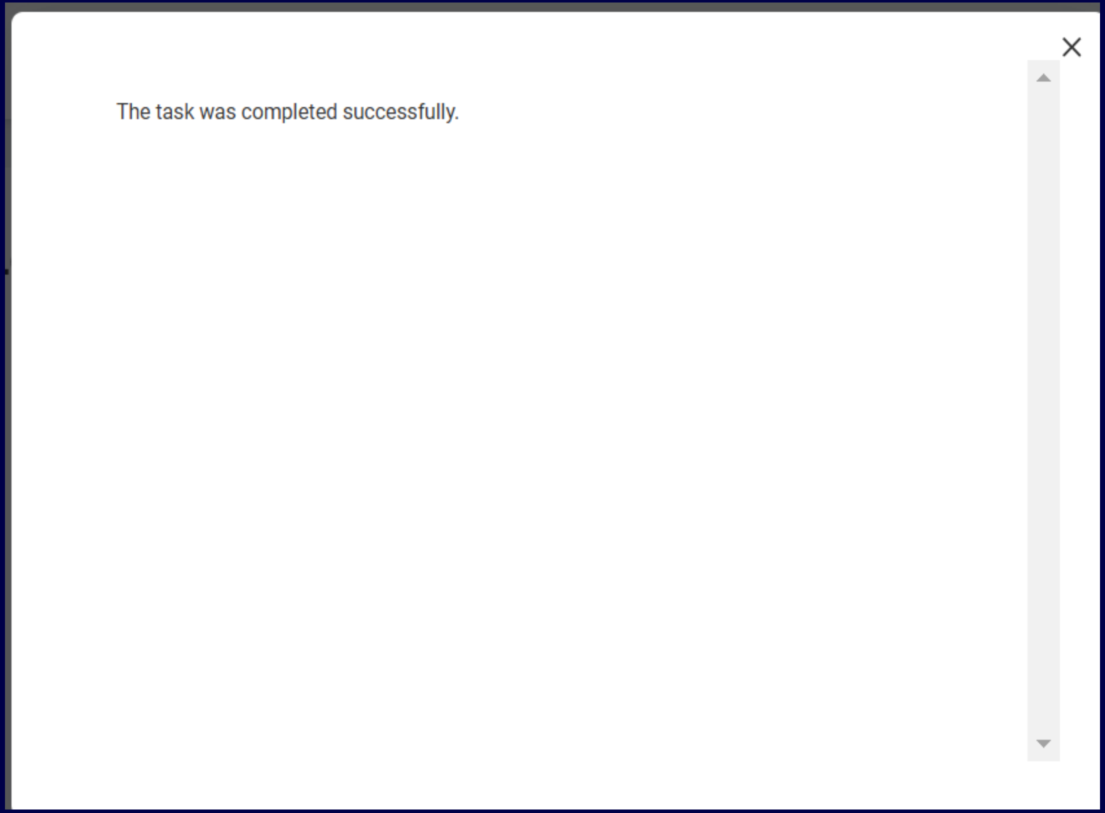
Surveys Migration

Impact analysis

Before the release

UI changes not available before the release

After the release



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Email Validation for External Learning Users

What's Changing

This release introduces email validation for external learning users to enhance data accuracy and prevent errors associated with known invalid email domains.

Additional Considerations

Domain Email domains:

Workday delivers a conversion that automatically enables the Modify

- Create ~External Learning User~
- Edit My Personal Information
- Edit ~External Learning User~
- Review ~External Learning User~
- Revise ~External Learning User~
- Request ~Extended Enterprise Learner~

What do I need to do

Nothing, this feature is automatically available.

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/lrnext/8578045.html

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Email Validation for External Learning Users, cont.

Additional Considerations

Revise Request ~Extended Enterprise Learner~

Web Services:

- Workday also update the Manage External Learning User web service (v44) to include this validation.
- Note: The email validation applies to all external learning users, even for customers who do not use Extended Enterprise but are creating external learning users to set up external trainers.

https://doc.workday.com/release-notes/en-us/lrnext/8578045.html

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Automatically available

Email Validation for External Learning Users

Impact analysis

Before the release	After the release
Before 2025 R1 release, Workday used to not get the validation to appear for invalid addresses.	After this release, Workday introduces email validation for external learning users to enhance data accuracy and prevent errors associated with known invalid email domains.

Impact description
Workday update these tasks to add a validation that prevents users from entering known invalid email domains: Create ~External Learning User~ Edit My Personal Information Edit ~External Learning User~ Review ~External Learning User~ Revise ~External Learning User~ Request ~Extended Enterprise Learner~ Request Edit ~Extended Enterpise Learner~ Revise Request ~Extended Enterprise Learner~

https://doc.workday.com/release-notes/en-us/lrnext/8578045.html

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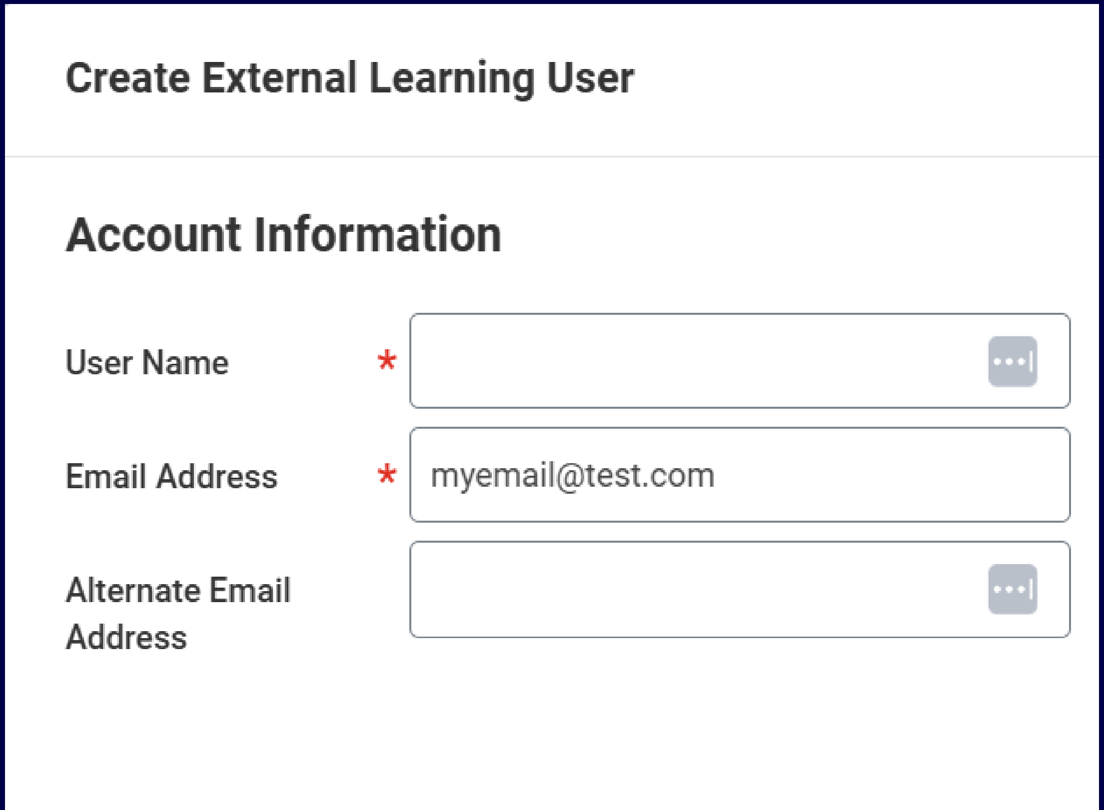
Automatically available

Email Validation for External Learning Users

Impact analysis

Before the release



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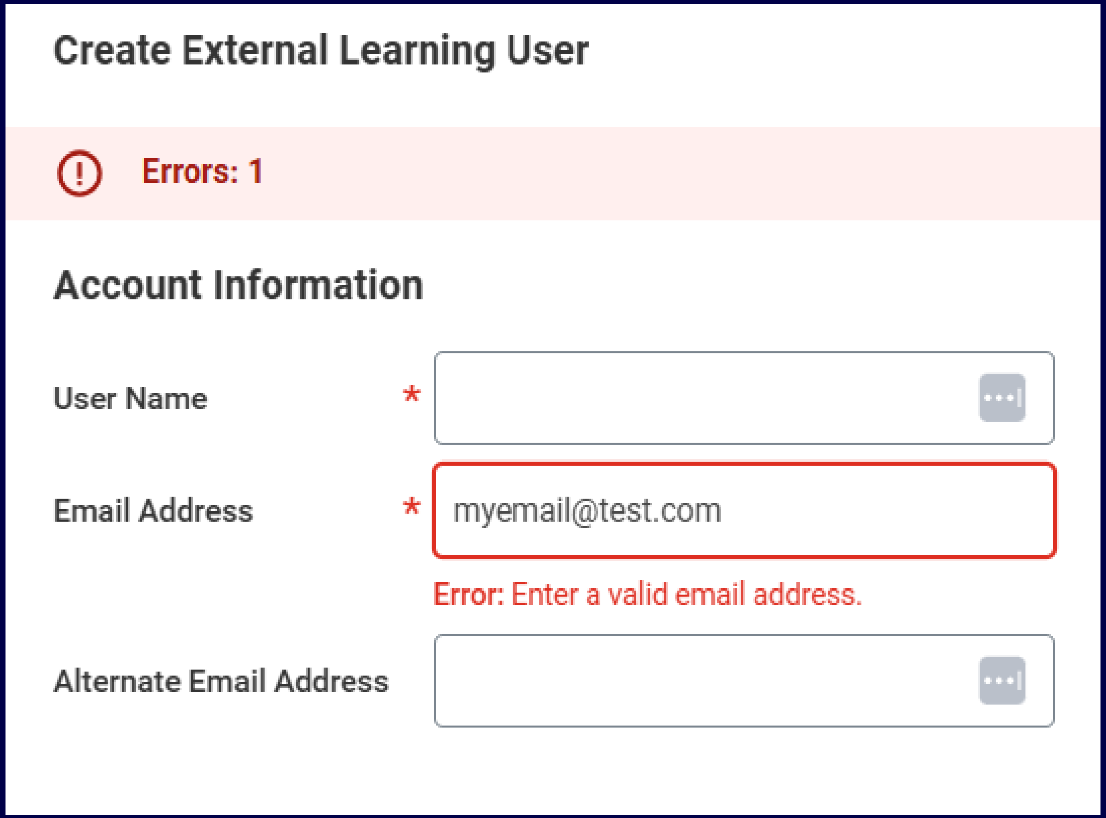

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Media Security

What's Changing

When you become inactive while watching videos in Workday, Workday now automatically refresh the page after 5 minutes of inactivity (decreased from 4 hours).

Additional Considerations

Workday Media Cloud updates video tokenization to improve security.

What do I need to do

This feature is automatically available.

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/wmc/8563638.html#qid=1212681

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Automatically available

Media Security

Impact analysis

Before the release	After the release
Before the 2025R1 release, no timeout was triggered when you become inactive while watching videos in Workday.	Workday now automatically refresh the page after 5 minutes of inactivity (decreased from 4 hours).

Impact description
Workday Media Cloud updates video tokenization to improve security

https://doc.workday.com/release-notes/en-us/wmc/8563638.html#qid=1212681

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The Enhanced Cloud Connect for Learning Platform

What's Changing

Workday delivers an enhanced Cloud Connect for Learning (CCL) platform that enables third-party content providers to easily integrate with Workday Learning.

Workday also streamlines the CCL setup process by consolidating all the setup tasks into 1 task. In addition, you can now request your content provider to build their own integration with Workday Learning by directing them to the Workday Partner Program.

Workday have outlined the list of providers building an integration to the new CCL platform in the Business Benefits section. For content provider integration delivery dates, contact your respective content providers directly. As content providers build their integration to the CCL Platform, Workday displays their names in the Content Provider prompt on the new consolidated task.

Note: With Workday 2025R1 Preview tenant, though there are a number of partners actively developing their connection to the platform, no integrations are complete and available to test at this point. Workday will update our documentation when content provider integrations are available.

What do I need to do

If you have enabled skills Import for Udemy and Skillsoft Percipio, Workday recommends you don't migrate to the new CCL platform. With 2025R1, Workday doesn't support the import of external skills in the new CCL platform. Workday targeting to support this in a future release. To utilize the new CCL platform, follow these steps whether you are setting up an already configured content provider or a new content provider.

Configuring CCL

Prerequisites

- To configure content import and tracking for a provider of your choice, you must have an active account with that provider and a Learning admin access.

https://doc.workday.com/release-notes/en-us/ccl/8725966.html

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The Enhanced Cloud Connect for Learning Platform, cont.

Additional Considerations

Configure Cloud Connect for Learning

Workday delivers a new consolidated Configure Cloud Connect for Learning task (secured to the Set Up: External Content domain) to simplify the way you set up cloud connect for learning and to offer you access to an expanded list of content providers.

If you set up CCL with a content provider using the new Configure Cloud Connect for Learning task, the content provider will be removed for you from the Configure External Content Provider task.

If you are setting up an integration with an existing content provider where channels were used, note that Workday no longer supports channel selection in the new CCL platform.

What do I need to do

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

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

https://doc.workday.com/release-notes/en-us/ccl/8725966.html

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The Enhanced Cloud Connect for Learning Platform, cont.

Additional Considerations

Search Facets

Workday allows you to add the new Authors and Publishers search facets to your custom Browse Learning Content and Manage Learning Content reports. You and your users can now filter the search based on authors or publishers of a piece of content, if your content provider supports these fields.

Known Issue: Workday displays the Authors and Publishers search facets in your custom Browse Learning Content and Manage Learning Content reports only if you clear the Sort by Relevance check box.

Content Types

Workday introduces 2 new content types, Collection and Document for third-party content providers to send content with collection and document types.

Users of the Browse Learning Content report and custom copies of the Manage Learning Content report can also now filter their search results based on the new content types in the External Content Type search facet.

What do I need to do

If the value is:

- MSA, you must enable the Cloud Connect for Learning service through Innovation Services.
- UMSA, this feature is automatically available.

Steps

1. Access the Maintain Functional Areas task to enable the Cloud Connect for Learning functional area.
2. Create an Integration System User (ISU). The ISU must be unique per content provider across the CCL platform.
   Note: If you already have a CCL integration with a content provider, you don't need to create a new ISU. Create a new ISU only if you have used the ISU for multiple tracking integrations.

https://doc.workday.com/release-notes/en-us/ccl/8725966.html

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The Enhanced Cloud Connect for Learning Platform, cont.

What do I need to do

3. Access the Configure Cloud Connect for

- Learning task and select the content
- provider of your choice.

4. In the Set Up Content and Content

- Provider step, select an ISU and content
- configuration settings.

5. In the Manage Content Catalog step select a default learning topic for your content.
   Note: All content imported to your tenant will be initially assigned to this topic. You'll be able to return to this task after the content import to create mapping between learning topics and content tags.

Setup required

Learning Report Fields

Workday adds these new report fields on the Learning Content business object (secured to the Manage: Learning Content, Set Up: Learning Catalog and Learning Access domains):

- Authors
- Publishers

https://doc.workday.com/release-notes/en-us/ccl/8725966.html

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The Enhanced Cloud Connect for Learning Platform, cont.

What do I need to do

Note: If you already have a CCL integration with a content provider, Workday will display the default topic and the topic-tag mapping.

6. In the Manage Credentials step generate credentials for these fields:

Client ID

Client Secret: Take note of the Client Secret value. If you lose it, you'll need to generate new credentials.

Auth URL

Tracking URL

Content URL

https://doc.workday.com/release-notes/en-us/ccl/8725966.html

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The Enhanced Cloud Connect for Learning Platform, cont.

What do I need to do

Note: If you have set up a CCL integration with a content provider previously, you don't need to regenerate credentials as they will be migrated to the new CCL platform.

7. Work with the content provider to complete the tracking setup for your tenant.

Search Facets

- If your content provider is integrated with the new CCL platform and supports sending authors and publishers data to Workday Learning, set up the Configure Cloud Connect for Learning task.

https://doc.workday.com/release-notes/en-us/ccl/8725966.html

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The Enhanced Cloud Connect for Learning Platform, cont.

What do I need to do

- Add the Authors and Publishers search facets to the custom copies of the Browse Learning Content and Manage Learning Content reports.

What Happens if I do Nothing?

- You can’t utilize the full catalog of content providers integrated with Workday Learning.
- If your content provider sends the authors and publishers data, you and your learners will be unable to filter search results based on the authors and publishers of the content.
- If your content provider sends collection and document content types, you and your learners will be unable to filter the search results based on collection and document content types.

https://doc.workday.com/release-notes/en-us/ccl/8725966.html

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The Enhanced Cloud Connect for Learning Platform

Impact analysis

Before the release	After the release
Before 2025 R1 release, Workday do not have enhanced Cloud Connect for Learning (CCL) platform that enables third-party content providers to easily integrate with Workday Learning.	Workday delivers a new consolidated **Configure Cloud Connect for Learning** task to simplify the way you set up cloud connect for learning and to offer you access to an expanded list of content providers.

Impact description

- You'll have access to more content providers integrated with the new CCL platform. With Workday 2025R1, these are the new content providers who are in the process of integrating with Workday Learning via CCL
- Workday 2025R1 has existing content providers who are in the process of integrating with the new CCL platform
- For integration delivery dates, contact your respective content provider directly. As content providers build their integration to the CCL platform, Workday displays their names in the **Content Provider** prompt on the new **Configure Cloud Connect for Learning** task.
- If you would like to add a content provider to our list of supported providers, you can request them to build their own integration with Workday Learning by directing them to the Workday Partner Program.

https://doc.workday.com/release-notes/en-us/ccl/8725966.html

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Setup required

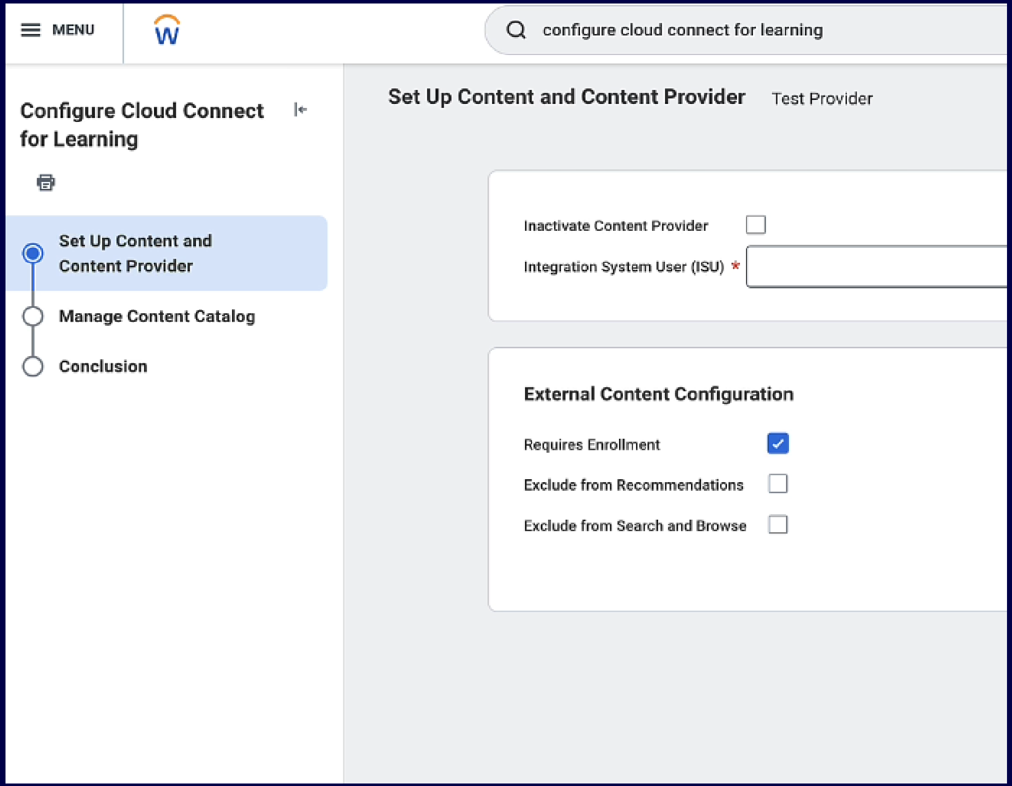
The Enhanced Cloud Connect for Learning Platform

Impact analysis

Before the release

N/A

After the release



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Learning Recommendations in Preferred Language

What's Changing

With this release, Workday enables learners to set their language preferences for the content that appears in learning recommendations.

Additional Considerations

- Workday adds a new Preferred Languages field to the Learning Preferences task. This allows learners to select one or more languages for the learning content that appears in their learning recommendations within:
- Career Hub
- Manager Insights Hub
- Opportunity Graph
- These Learning sliders:
    - Based On Your Interests
    - Based on Your Skills to Develop
    - Grow Your Career
    - Most Popular

What do I need to do

1. Verify that the language field is populated for all the learning content. You can mass update language tags using the Manage Learning Course web service.
2. (Optional) Use the Configure Optional Fields task to make the Language field required.
3. Select the Enable Language Preferences check box in the Edit Tenant Setup - HCM task.
4. Review your training materials and encourage learners to specify their preferred languages in the Learning Preferences task.

https://doc.workday.com/release-notes/en-us/lrn/3712137.html

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Learning Recommendations in Preferred Language, cont.

Additional Considerations

- Popular in Your Role
- Recently Added
- Recommended for You
- You Might Also Be Interested in

Workday introduces a new Preferred Learning Languages report field on the Person business object (secured to the Public Reporting Items domain). This field allows you to report on the learners preferred languages settings.

Workday updates the Edit Tenant Setup - HCM task to include a new Enable Language Preferences option in the Learning section, allowing administrators to activate this feature.

What Happens if I do Nothing?

Workday shows all learning recommendations regardless of language unless you enable this feature, and learners specify their preferred language.

https://doc.workday.com/release-notes/en-us/lrn/3712137.html

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Learning Recommendations in Preferred Language, cont.

Additional Considerations

- Workday also introduces new options in the Configure Optional Fields task to ensure learning content is properly tagged. You have the flexibility to require language tags for learning content using these business process types under the Learning Core functional area:
- Manage Course
- Manage Course Offering
- Manage Lesson
- Manage Program
- Note: The Enforce Required in Web Service option within the task is not yet supported for web services updates to learning content. Workday will update the release note once this becomes available.

https://doc.workday.com/release-notes/en-us/lrn/3712137.html

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Setup required

Learning Recommendations in Preferred Language

Impact analysis

Before the release	After the release
Before 2025 R1 release, Workday enable learners to set their language preferences for the content that appears in learning recommendations.	With this release, Workday improves the learner experience of your global workforce by ensuring that the recommended content aligns with the languages they understand best

Impact description
Workday add a new **Preferred Languages** field to the **Learning Preferences** task. This allows learners to select one or more languages for the learning content that appears in their learning recommendations .

https://doc.workday.com/release-notes/en-us/lrn/3712137.html

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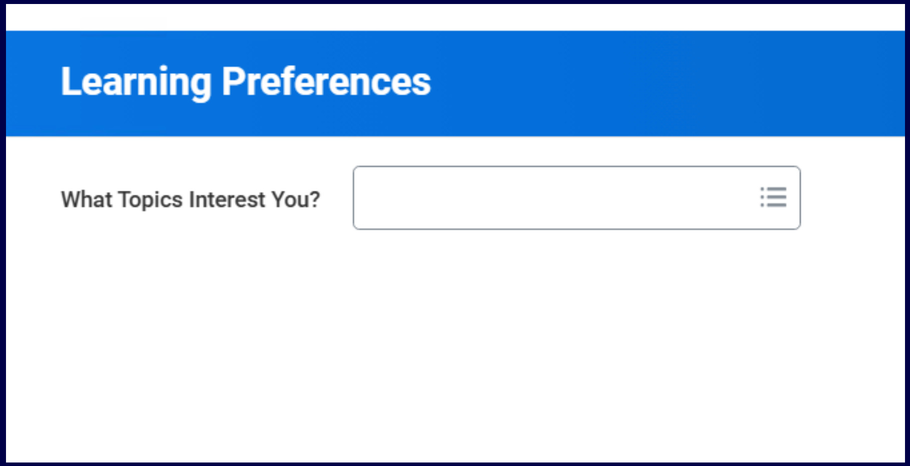
Setup required

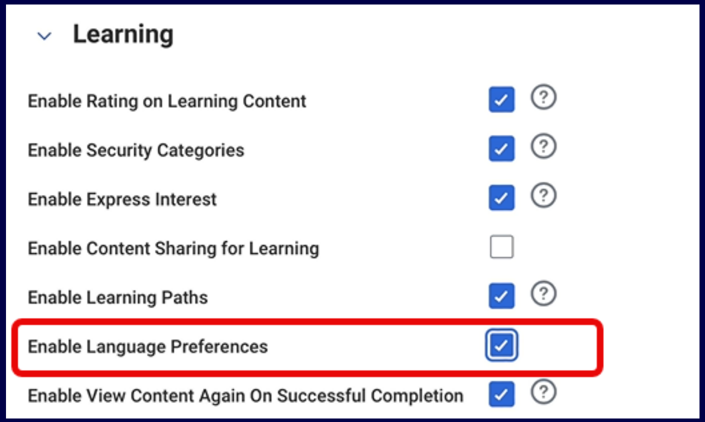
Learning Recommendations in Preferred Language

Impact analysis

Before the release



After the release



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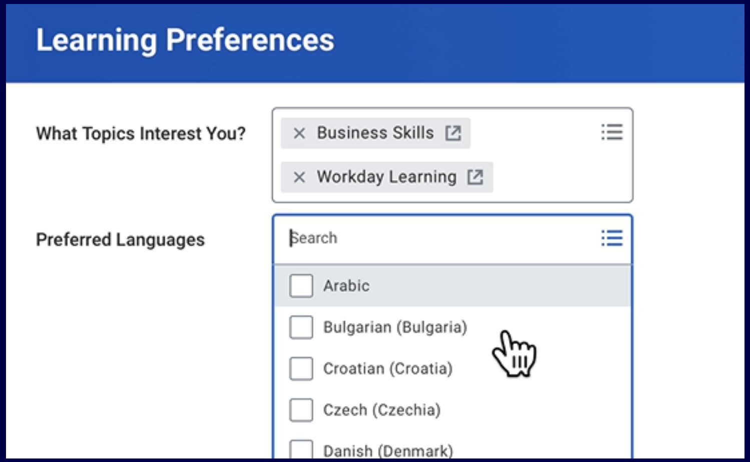
Learning Recommendations in Preferred Language

Impact analysis

Before the release

- N/A

After the release



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Engagement Builder

What's Changing

Audience Builder

- Workday now deliver the Audience Builder dashboard (secured to the new *Administer Audience* and existing *Administer Campaigns* domains) that you can use to create and preview configurable audiences for your engagements.
- Workday also deliver these reports and tasks (secured to the *Administer Campaigns* domain) to support the Audience Builder dashboard:
  - Calculate Audience Size
  - Edit Audience
  - View Audience
    Engagement Builder

What do I need to do

Engagement Builder is available for all HCM customers

What Happens if I do Nothing?

You can continue to use legacy Campaigns.

https://doc.workday.com/release-notes/en-us/camp/8678565.htm

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Engagement Builder, cont.

What’s Changing

Workday deliver the new Engagement Builder report (secured to the Administer Campaigns domain) that you can use to manage engagements. Workday also deliver these reports and tasks to support Engagement Builder:

- Engagement Builder Edit
- Engagement Dashboard
- View Connect Exclusion Rule
- View Metadata Connect Exclusion Rule

https://doc.workday.com/release-notes/en-us/camp/8678565.htm

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Engagement Builder, cont.

What's Changing

Engagement Builder Web Services

- Workday deliver these web services (secured to the Administer Audience domain) that you can use to manage your audience information:
- Get Audience Builder (Web Service)
- Put Audience Builder (Web Service)
- Workday also deliver these web services (secured to the Administer Campaigns domain) that you can use to manage your engagement information:
- Get Engagement Builder (Web Service)
- Submit Engagement Builder (Web Service)

https://doc.workday.com/release-notes/en-us/camp/8678565.htm

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Engagement Builder, cont.

Additional Considerations

Engagement Builder enables you to:

- Create and manage audiences and engagements from a centralized workspace with improved search and filtering.
- Experience faster processing times, especially for high-volume engagements, and greater observability into engagement performance.
- Run engagements using Integration System User accounts, which can prevent interruptions to your engagements.
- Schedule engagements automatically rather than manually.
  Workday Message Builder
- Engagement Builder uses Workday Message Builder to enable you to:
- Create notifications for engagement items using rich text-editing, AI content suggestions, and personalized report fields to capture attention and drive action.
- Preview notifications for engagement items exactly as recipients will view them, including the ability to view and link notification templates.

https://doc.workday.com/release-notes/en-us/camp/8678565.htm

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Setup required

Engagement Builder

Impact analysis

Before the release	After the release
Before the release, Workday have the complicated campaign creation process	Workday to replace the “Create Audience” task with audience builder and replace Campaigns with Engagement Builders

Impact description

Audience Builder

Workday now deliver the **Audience Builder** dashboard (secured to the new *Administer Audience* and existing *Administer Campaigns* domains) that you can use to create and preview configurable audiences for your engagements.

Engagement Builder

Workday deliver the new **Engagement Builder** report (secured to the *Administer Campaigns* domain) that you can use to manage engagements. Workday also deliver these reports and tasks to support Engagement Builder:

.

https://doc.workday.com/release-notes/en-us/camp/8678565.htm

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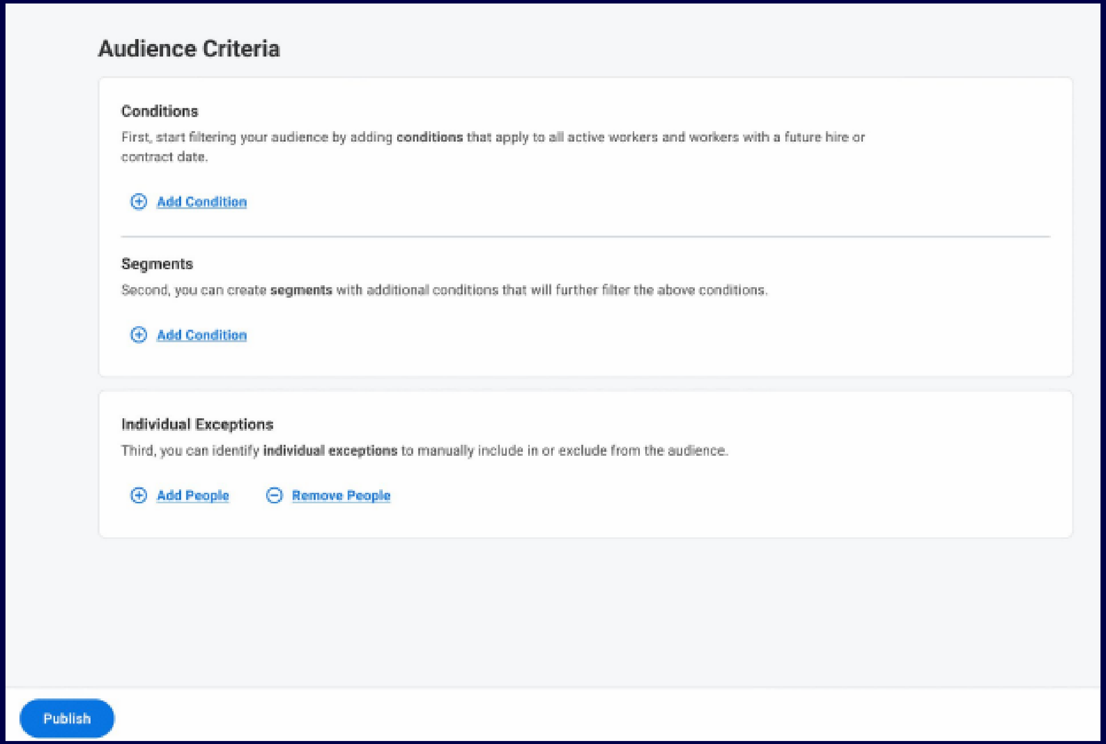
Setup required

Engagement Builder

Impact analysis

Before the release

After the release



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Setup required

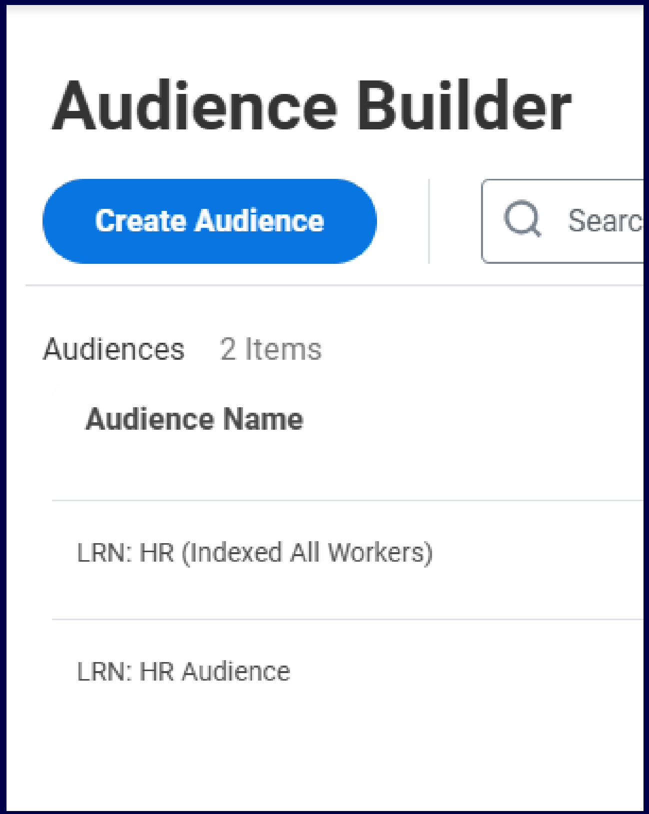
Engagement Builder

Impact analysis

Before the release

- N/A

After the release



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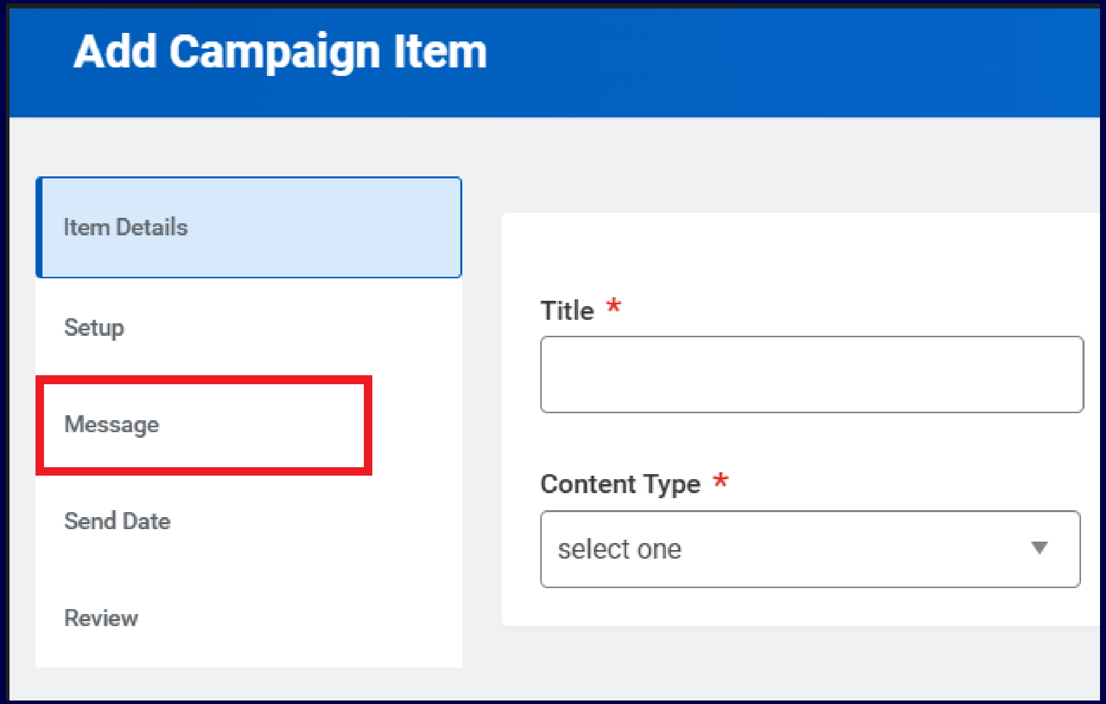
Setup required

Engagement Builder

Impact analysis

Before the release



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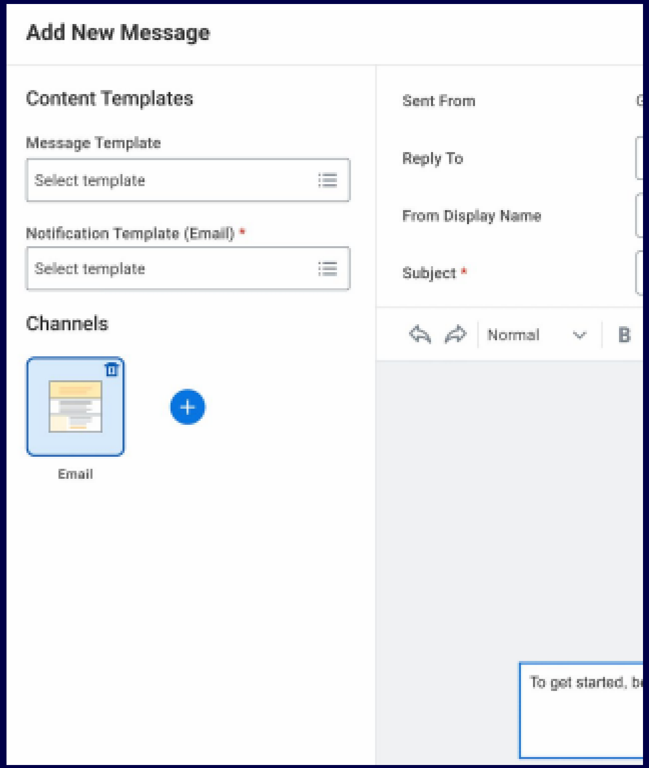

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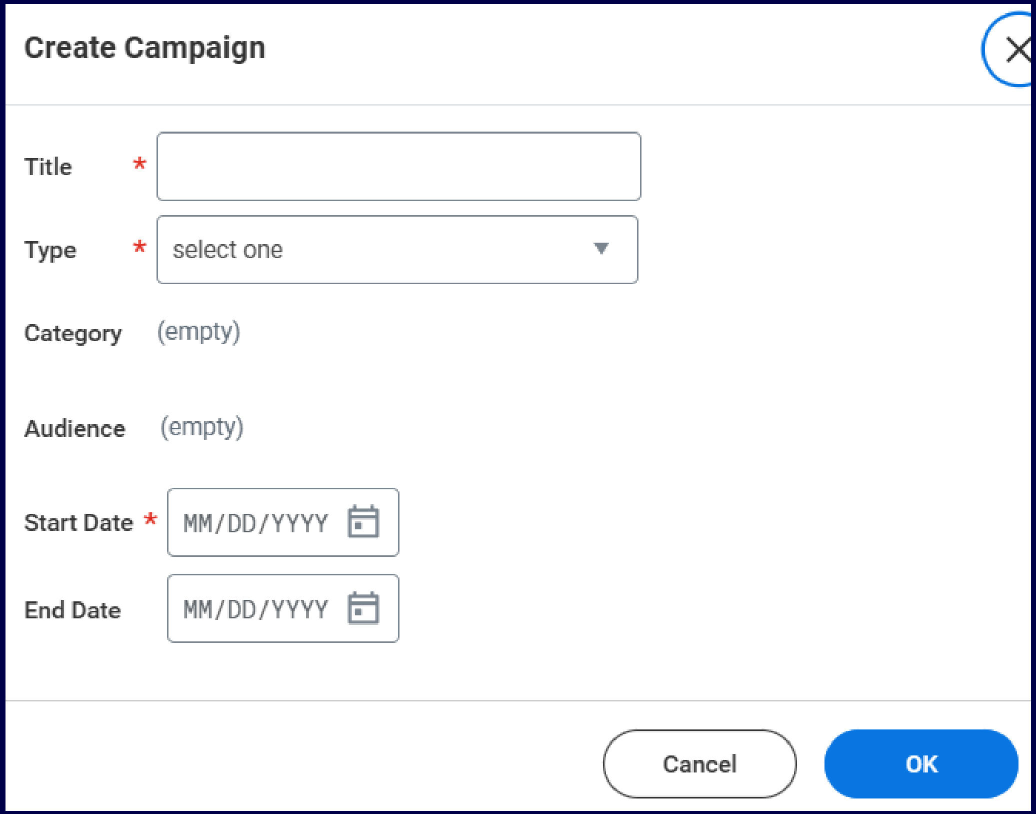
Setup required

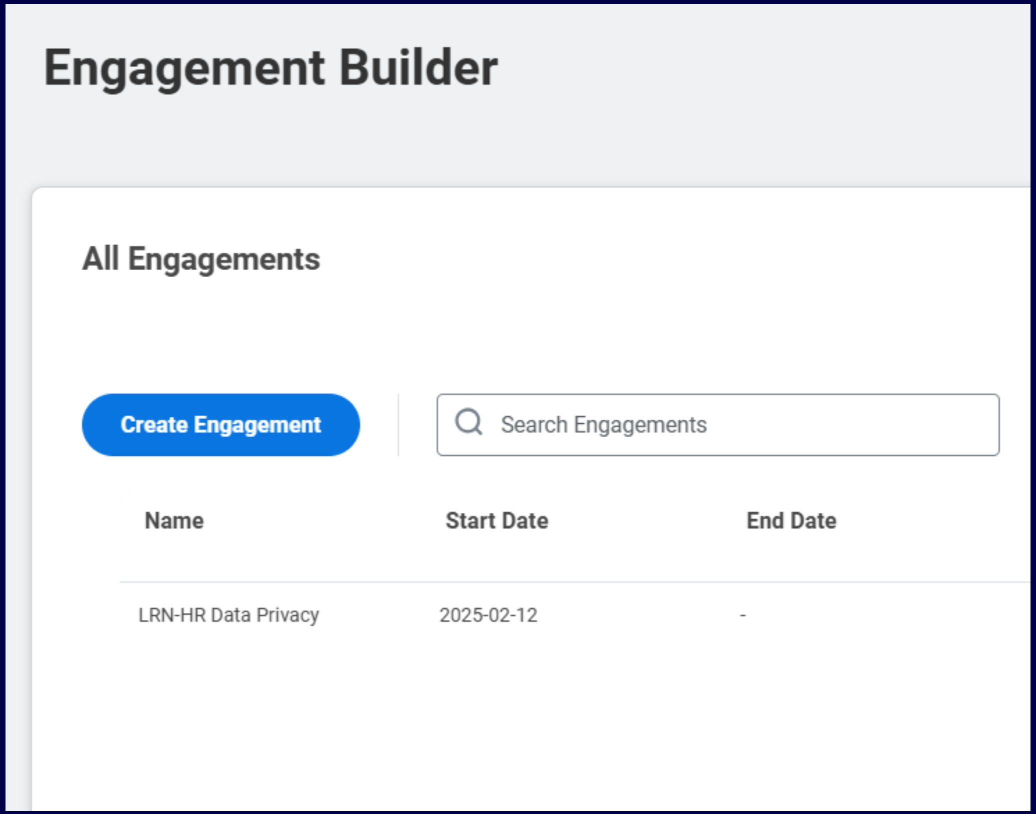
Engagement Builder

Impact analysis

Before the release



After the release



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Payroll

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Intelligent Prompt Recommendations for Pay Calculation

What's changing

With this release, Workday delivers intelligent prompt recommendations for Run Pay Calculation.

Additional considerations

Workday delivers a new Run Pay Calculation grid on the Payroll section of the Maintain Machine Learning Prompt Recommendations task. You can now configure Workday to display machine learning recommendations for the Pay Run Group and/or Pay Group Details prompt on the Run Pay Calculation task.

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

What do I need to do

On the Run Pay Calculation task, after you select a period from the Period prompt, you must click into the prompt for Pay Run Groups and/or Pay Group Details. Workday then displays the recommendations

What happens if I do nothing

These changes will still apply since they are automatically available.

https://doc.workday.com/release-notes/en-us/payml/8734948.html

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Intelligent Prompt Recommendations for Pay Calculation

Impact analysis

Before the release	After the release
Intelligent prompt recommendation was not available for Run Pay Calculation under Payroll.	Intelligent prompt recommendation is available for Run Pay Calculation under Payroll.

Impact description
Workday will display machine learning recommendations for the Pay Run Group and/or Pay Group Details prompt on the Run Pay Calculation task.

https://doc.workday.com/release-notes/en-us/payml/8734948.html

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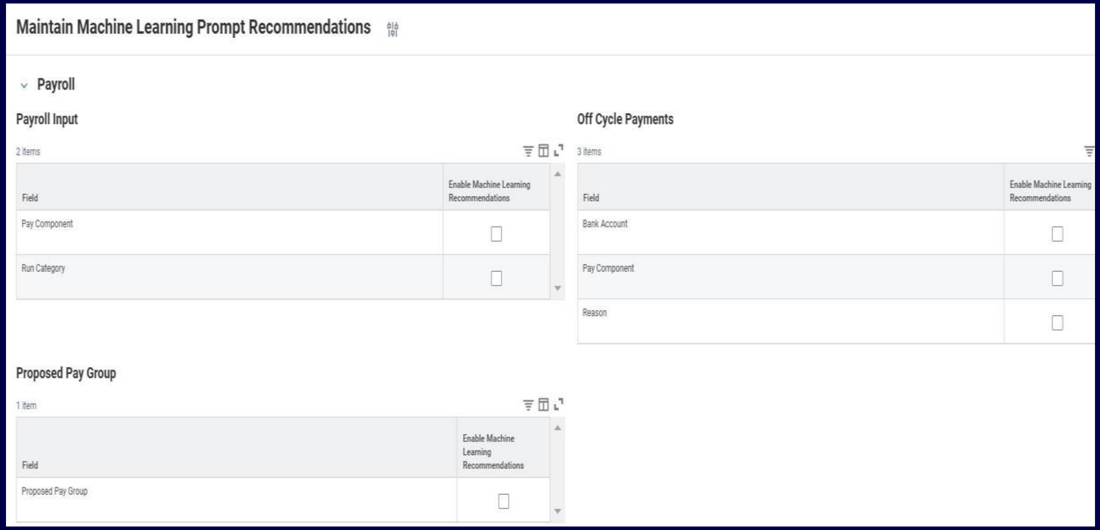
Automatically available

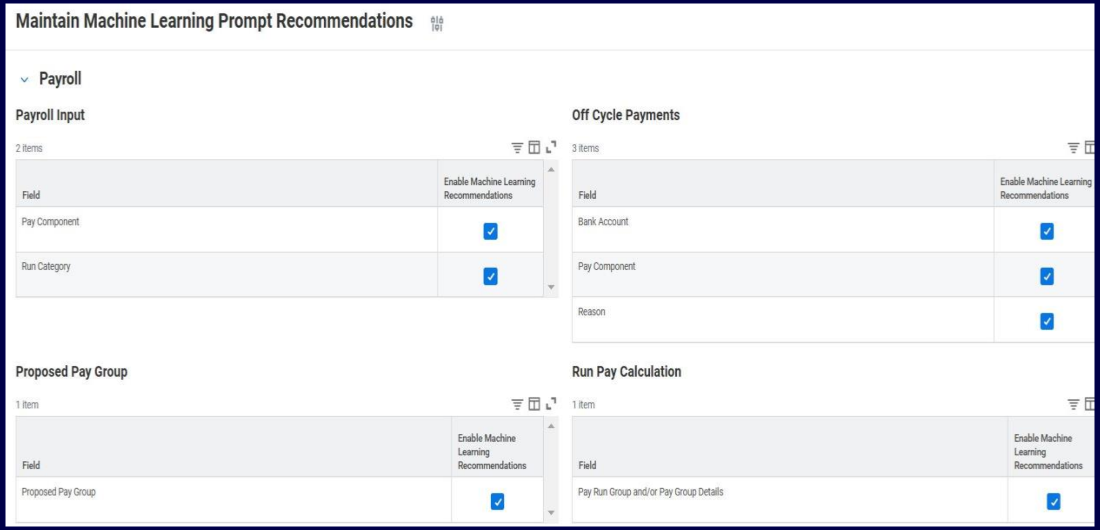
Intelligent Prompt Recommendations for Pay Calculation

Impact analysis

Before the release



After the release



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Lock Pay Group for Auditing

What’s changing

Workday now enables you to set up a pay group detail in a lock or unlock status. When locked, Workday doesn't automatically flips the In Progress on-cycle results within the pay group to Requires Re-calculation status due to worker-based events.

Additional considerations

Lock Pay Groups To Block All Pay Calculations on Payroll Results

Workday delivers a new Lock Pay Groups To Block All Pay Calculations on Payroll Results check box under Pay Group Status Lock of the Pay / Retro Calculations section on the Edit Tenant Setup - Payroll task.

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.

What happens if I do nothing

This feature is automatically available

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

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Lock Pay Group for Auditing, cont.

Additional considerations

Update Pay Group Lock Status

Workday also delivers a new Update Pay Group Lock Status task (secured to the Process: Run Batch Calculations (Pay Calculation) domain) that you can use to select the Lock Pay Groups action and enter specific Pay Group Details. When you run pay calculation and all results are In Progress, use this task to lock the pay group details.

Lock Status

Workday now displays the status of the lock in the:

- Current Period Locked column on the Pay Group Period Details section of the View Pay Group report.
- Current Period Locked field on the Periods section of the View Pay Group Detail page.
- Pay Group Detail Locked column on the Results tab of the worker.

What do I need to do

Access the Update Pay Group Lock Status task to lock the pay group details. This task is automatically available.

Setup is required if you want a restrictive workflow for processing payroll. You must enable the Lock Pay Groups To Block All Pay Calculations on Payroll Results check box under Pay Group Status Lock of the Pay / Retro Calculations section on the Edit Tenant Setup - Payroll task.

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

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Lock Pay Group for Auditing, cont.

Additional considerations

Retroactive Payroll

When you enter any of these events after you lock a pay group; and you don't recalculate the worker before you complete payroll, then when you run retro pay calculation, Workday processes these events in the next on-cycle pay period:

- One-time pay input.
- One-time payment.
- Ongoing pay input.
- Period activity pay.

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

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Automatically available

Lock Pay Group for Auditing

Impact analysis

Before the release	After the release
Before the release, Workday did not enable you to setup pay group details in a lock or unlock status.	After the release, Workday enables you to set up a pay group detail in a lock or unlock 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.

Impact description
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

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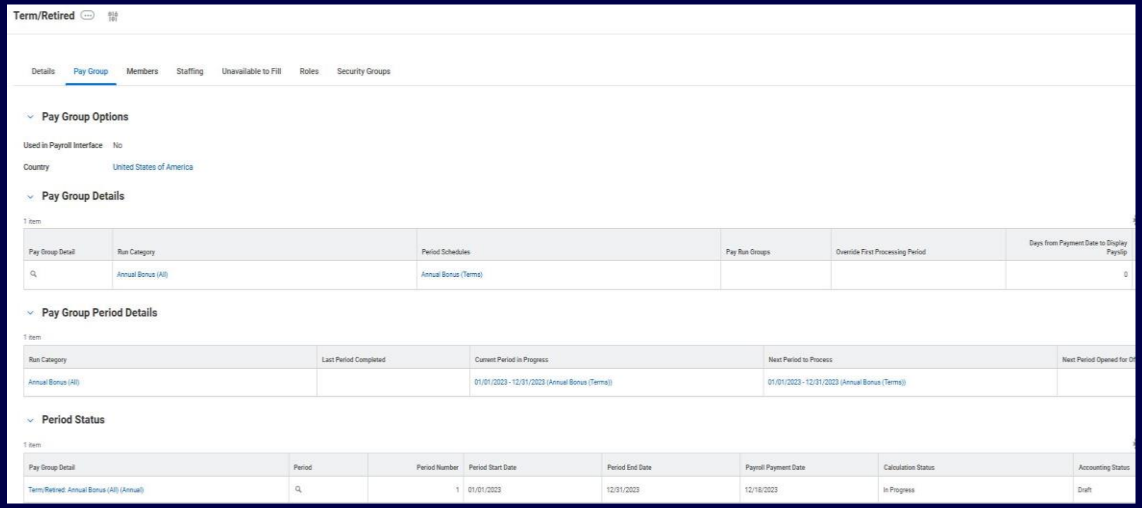
Automatically available

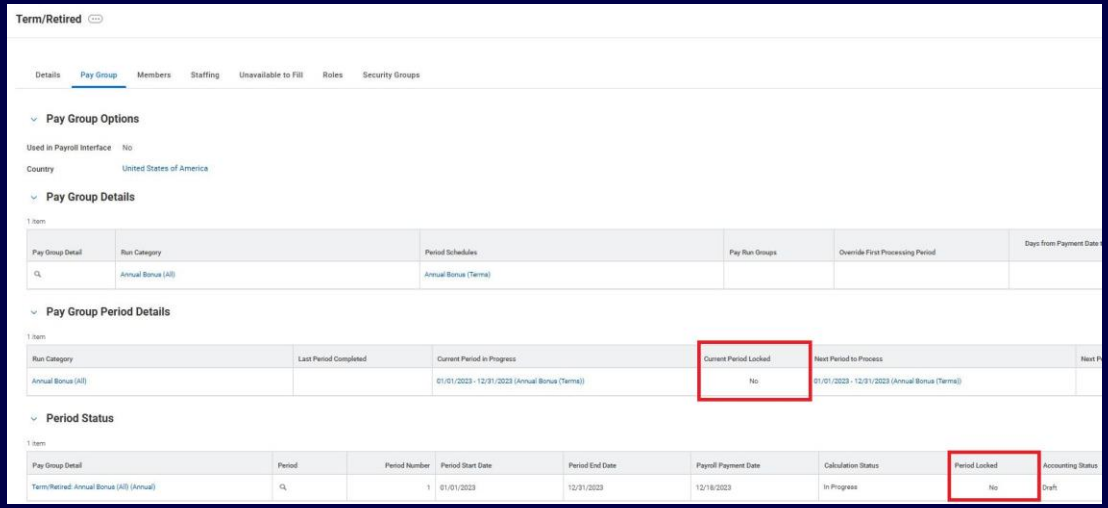
Lock Pay Group for Auditing

Impact analysis

Before the release



After the release



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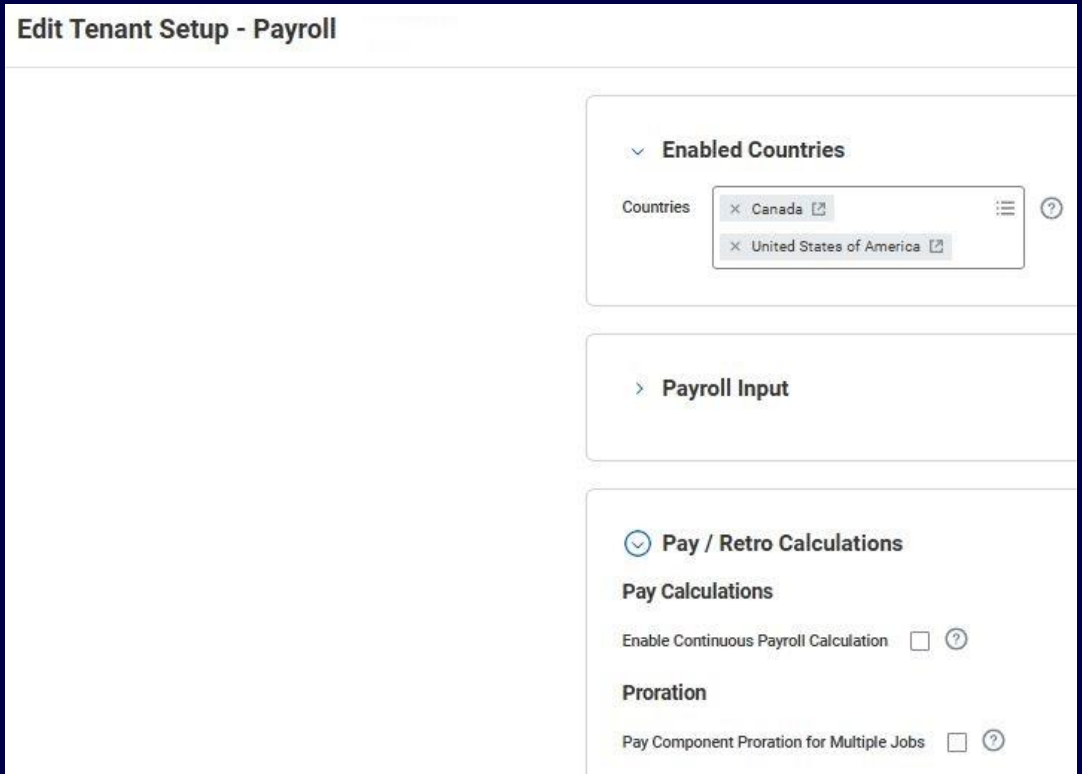
Automatically available

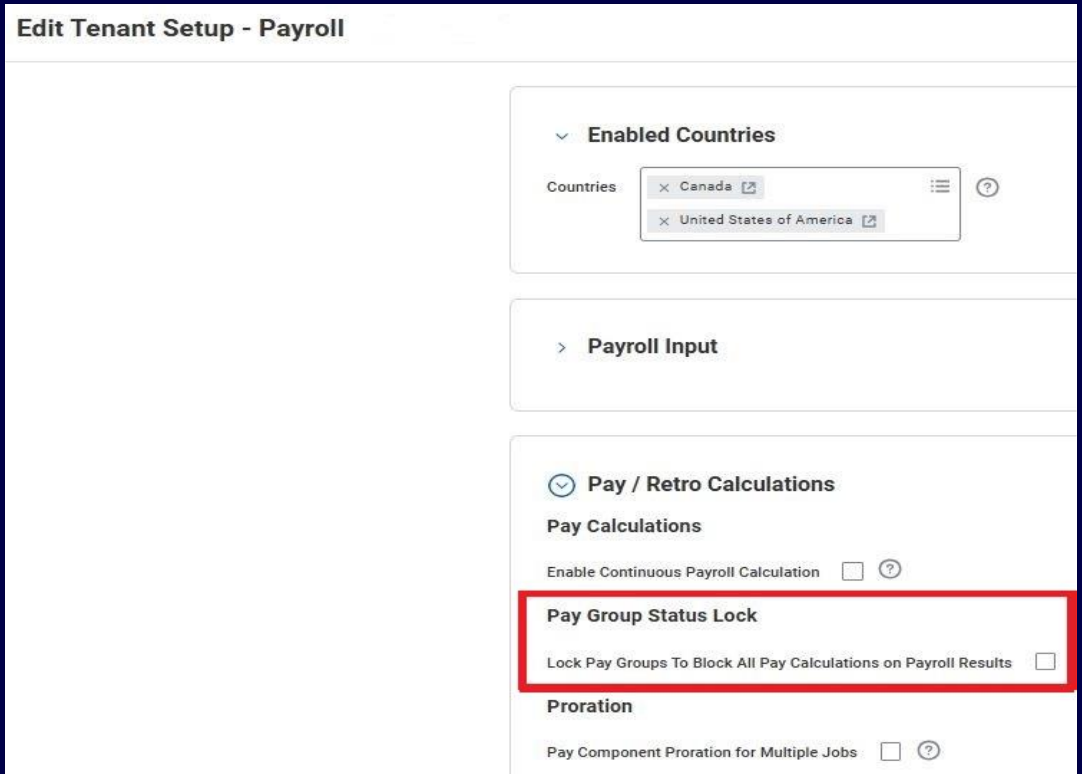
Lock Pay Group for Auditing

Impact analysis

Before the release



After the release



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Intelligent Prompt Recommendations for Payroll

What's changing

Workday now makes intelligent prompt recommendations for payroll automatically available, meaning that you no longer need to opt in to access recommendations. Workday also enables prompt recommendations on the Add Payroll Input task.

Additional considerations

Workday now enables machine learning prompt recommendations for payroll by default. You no longer need to opt in to view recommendations on the supported tasks and prompts. You can opt out of prompt recommendations at any time.

Workday also enables prompt recommendations on the Pay Component and Run Category prompts of the Add Payroll Input task on the worker payroll results.

What do I need to do

You don't need to do anything to access prompt recommendations on the supported tasks and prompts.

To opt out of machine learning recommendations:

1. Access the Maintain Machine Learning Prompt Recommendations task.
2. In the Payroll section, clear the check boxes for any or all of these categories:
   - Payroll Input.
   - Proposed Pay group.
   - Off cycle Payment.

What happens if I do nothing

If you do nothing intelligent prompt recommendations display below the field or in a recommended folder under the prompt.

https://doc.workday.com/release-notes/en-us/payexp/8356208.html

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Automatically available

Intelligent Prompt Recommendations for Payroll

Impact analysis

Before the release	After the release
You needed to opt in to view machine learning prompt recommendations on the supported tasks and prompts in Payroll.	Workday now enables machine learning prompt recommendations for payroll by default. You no longer need to opt in to view recommendations on the supported tasks and prompts.

Impact description
Workday now enables machine learning prompt recommendations for payroll by default. Intelligent prompt recommendations display below the field or in a Recommended folder under the prompt.

https://doc.workday.com/release-notes/en-us/payexp/8356208.html

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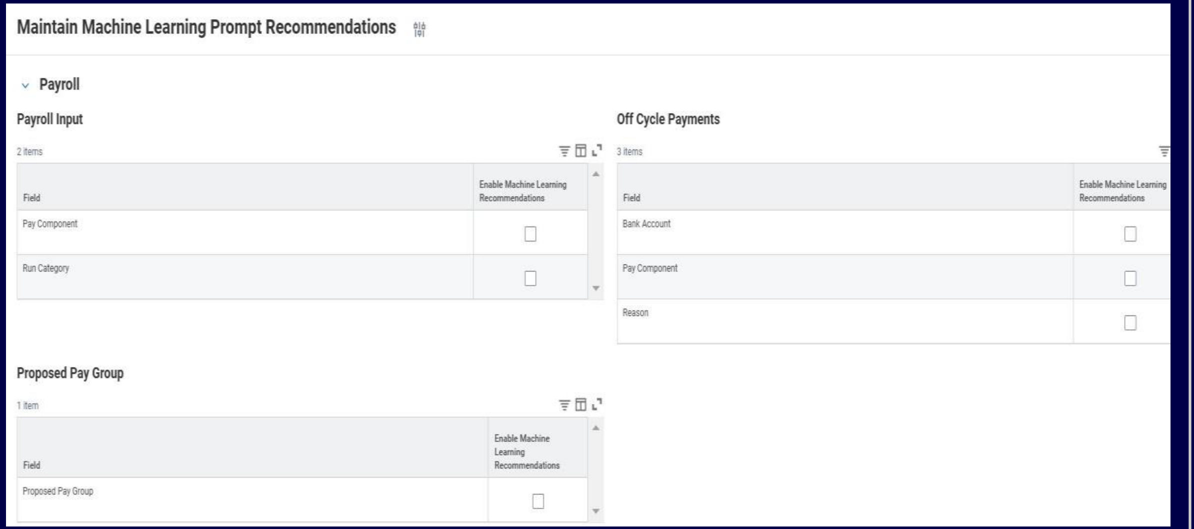
Automatically available

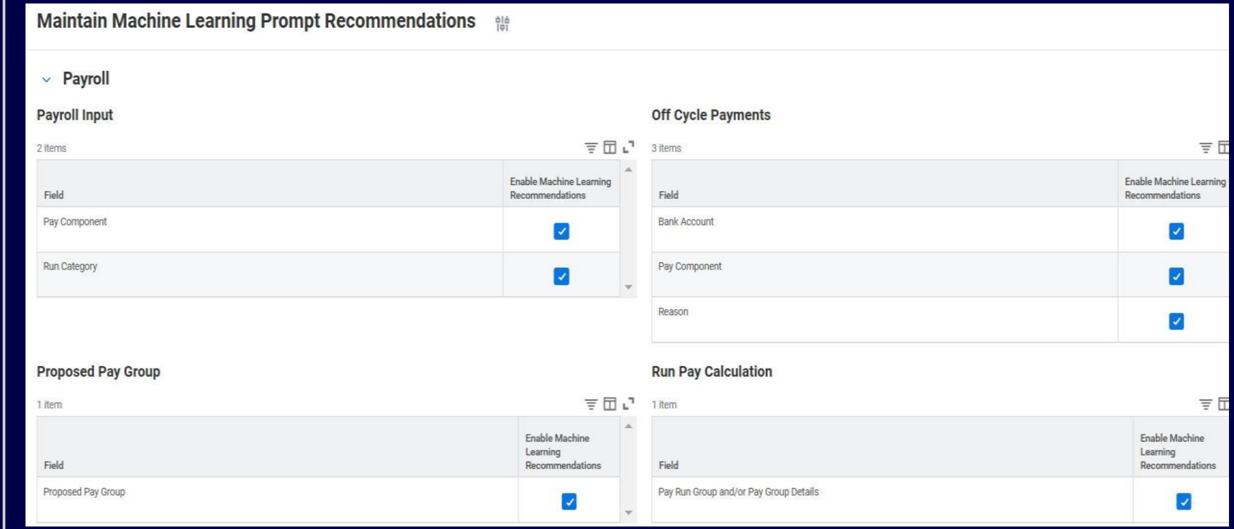
Intelligent Prompt Recommendations for Payroll

Impact analysis

Before the release



After the release



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Maintain Payroll Accounting Options

What's changing

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

Additional considerations

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

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

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

What do I need to do

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

What happens If I do nothing

This feature is automatically available.

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

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Maintain Payroll Accounting Options, cont.

Additional considerations

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

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

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Maintain Payroll Accounting Options

Impact analysis

Before the release	After the release
There were different tasks used for maintaining different accounting related settings.	Workday introduces this new task which enables you to configure various payroll accounting settings and features.

Impact description

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

Workday will fully deprecate these tasks in future:
Maintain Payroll Forward Accrual Options
Maintain Payroll Retro Accounting Options
Maintain Payroll Work-Study Options

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

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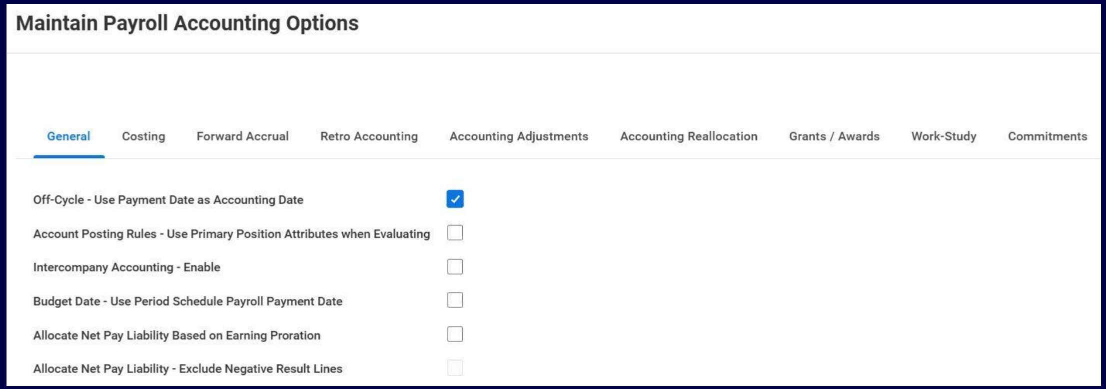
Maintain Payroll Accounting Options

Impact analysis

Before the release

This is a new task introduced by Workday which enables you to configure various payroll accounting settings and features in one place.

After the release



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Union Override Rates Calculation

What's changing

Workday updates the union override rates calculation.

What do I need to do

The feature is automatically available.

Additional considerations

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

What happens if I do nothing

Workday will automatically use the lowest override tax rate for processing in case of multiple unions for Workers.

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

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Automatically available

Union Override Rates Calculation

Impact analysis

Before the release	After the release
Before the release, Workday did not consider the lowest override tax rate when there are different rates for workers who belong to multiple Unions.	Workday now uses the lowest override tax rate when you set up union override rates for multiple unions that a worker belongs to on the **Union** tab of the **Edit Company State and Local US Tax Reporting** task

Impact description
With this feature, Workday automatically picks up the lowest Override tax rates when you have defined different rates for worker having multiple Unions.

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

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Smart Print Payslips

What's changing

Workday continues to improve performance for smart print payslips.

What do I need to do

The feature is automatically available.

Additional considerations

Workday improves performance while generating PDFs of Report Designer payslips when you select the Smart Print Payslips option on the Schedule BIRT Payslip Pre-Print task.

What happens if I do nothing

Workday will still improve performance while generating PDFs of Report Designer payslips.

https://doc.workday.com/release-notes/en-us/payml/8737355.html

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Smart Print Payslips

Impact analysis

Before the release	After the release
It used to take more time for processing pay slips using the smart print option.	Workday continues to improve performance for smart print pay slips.

Impact description
Processing time to generate PDFs for workers is minimized.

https://doc.workday.com/release-notes/en-us/payml/8737355.html

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Assign Costing Allocation Redesign

What's changing

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

Additional considerations

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

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

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

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

What do I need to do

Nothing. Workday delivers this feature automatically.

What happened if I do nothing

This feature is automatically available.

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

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Automatically available

Assign Costing Allocation Redesign, cont.

Additional considerations

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

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

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

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Assign Costing Allocation Redesign

Impact analysis

Before the release	After the release
Assign Costing allocation screen had a single tab to enter Costing allocation details	Assign Costing allocation screen now has a new display for the Proposed Costing Allocations tab and the existing Costing allocation tab.

Impact description
This enhancement streamlines the user experience of adding and removing proposed costing allocations and simplify the workflows for revising, approving, and reviewing costing allocation changes for workers.

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

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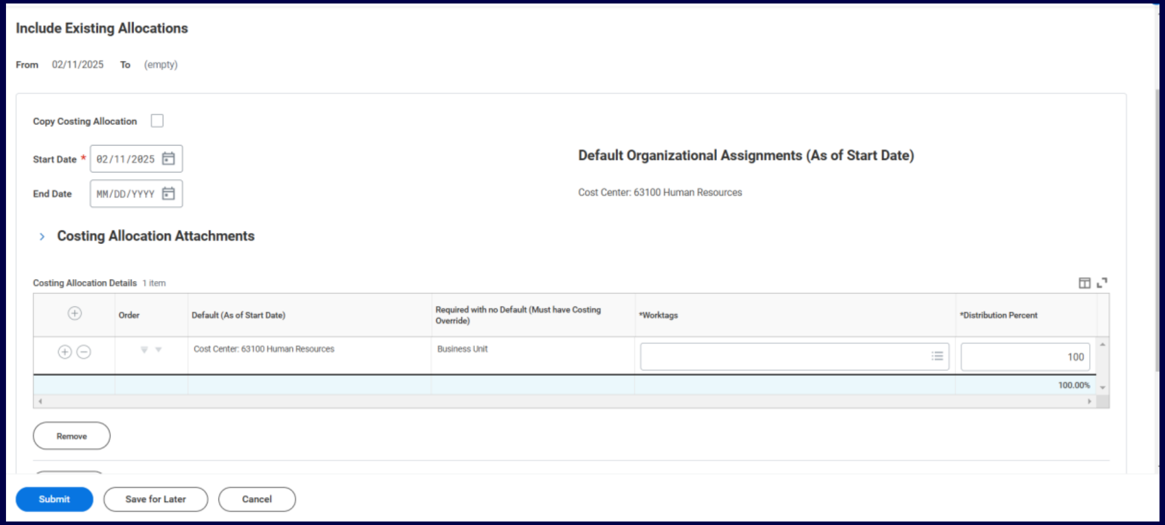
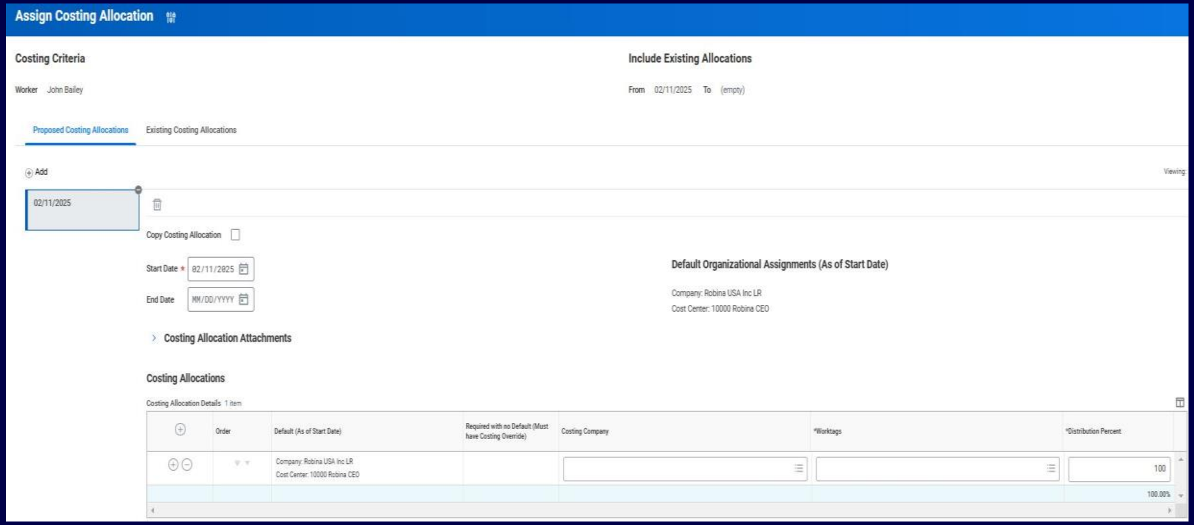
Assign Costing Allocation Redesign

Impact analysis

Before the release



After the release



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Enhancements to Period Schedule Searching

What's changing

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

Additional considerations

Search Period field by Date Ranges

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

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

What do I need to do

This feature is automatically available.

What do I need to do

You will still be able to utilize the enhanced search features for Period Schedules.

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

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Enhancements to Period Schedule Searching, cont.

Additional considerations

- MM/YYYY and Period Schedule name. Only periods that match both the date criteria and the period schedule name display. This method refines your search to the most specific results.
- YYYY. Displays only periods that started or ended in that year.

Search Period Schedule by Pay Group Details

Workday enables you to search in the Pay Run Groups and/or Pay Group Details search field using these parameters, either individually or combined:

- Pay Group
- Period Schedule Name
- Run Category

Workday also captures misspelled entries. Example: You enter Regluar for Regular. The Regular pay group results display.

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

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Enhancements to Period Schedule Searching

Impact analysis

Before the release	After the release
Period schedules could not be searched using keywords like Month or Year or Partial date formats.	Workday enables you to search Periods by entering search text like *Month*, Year, and dates in different formats to match the Period dates

Impact description
These updates enable you to specify and receive more relevant Period Schedule search results, saving you time and making the search process more efficient.

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

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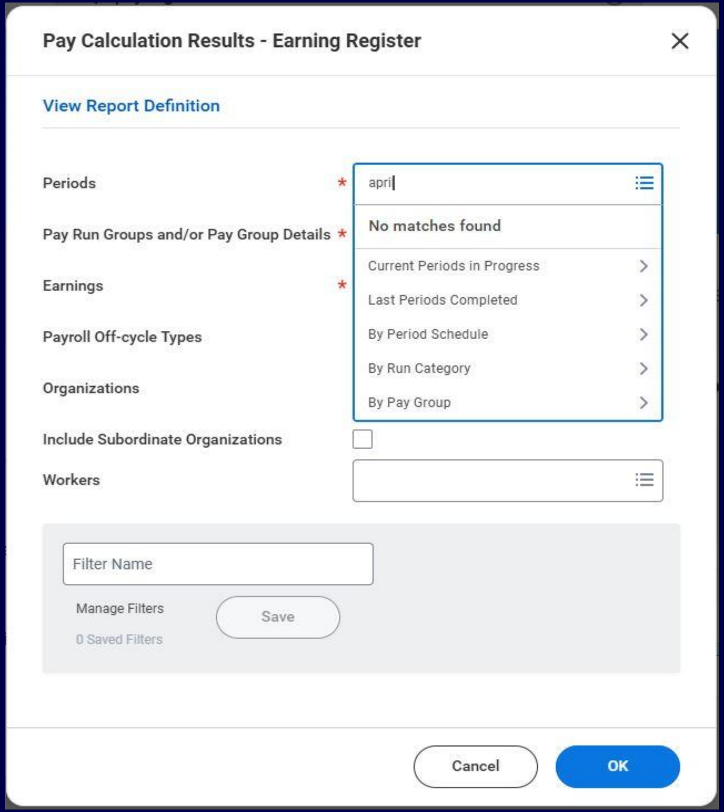
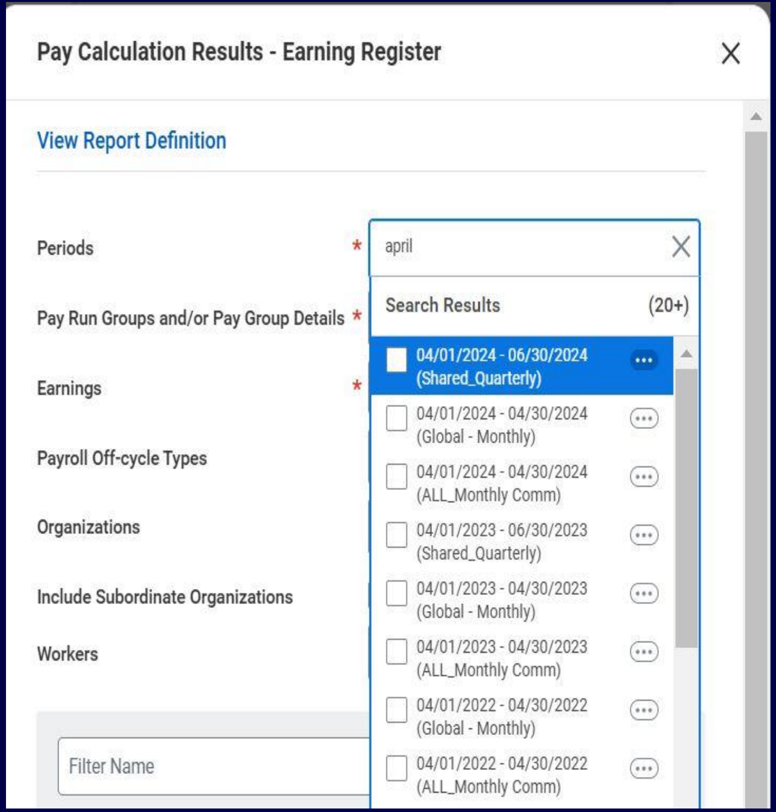
Enhancements to Period Schedule Searching

Impact analysis

Before the release



After the release



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SUI Tax Deduction

What's changing

Workday updates the SUI (ER) [USA] deduction to now use the out-of-state wage rules setting on the tax authority to determine whether or not to apply out-of-state wages to the wage base limit calculation for SUI.

Additional considerations

N/A

What do I need to do

Nothing. The out-of-state wage rules setting on the payroll tax authority for the impacted states Indiana, Louisiana, Montana, Minnesota, Massachusetts remain the same.

What happens if I do nothing

There is no impact to existing configurations. You will now see the Allow Out-of-State Wages for State Unemployment setting on the View Payroll Tax Authority report for these 5 states:

- Indiana
- Louisiana
- Montana
- Minnesota
- Massachusetts

https://doc.workday.com/release-notes/en-us/paywdusa/8666602.html

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SUI Tax Deduction

Impact analysis

Before the release	After the release
Before the release the Allow Out-of-State Wages for State setting on not available on the View payroll tax Authority report and it was not used in the calculation of SUI.	After the release, Workday uses the out-of-state wage rules setting on the tax authority to determine whether or not to apply out-of-state wages to the wage base limit calculation for SUI. Allow Out-of-State Wages for State setting now added on the View Payroll Tax Authority.

Impact description

There is no impact to existing configurations. You will now see the Allow Out-of-State Wages for State Unemployment setting on the View Payroll Tax Authority report for these 5 states:
Indiana
Louisiana
Montana
Minnesota
Massachusetts

https://doc.workday.com/release-notes/en-us/paywdusa/8666602.html

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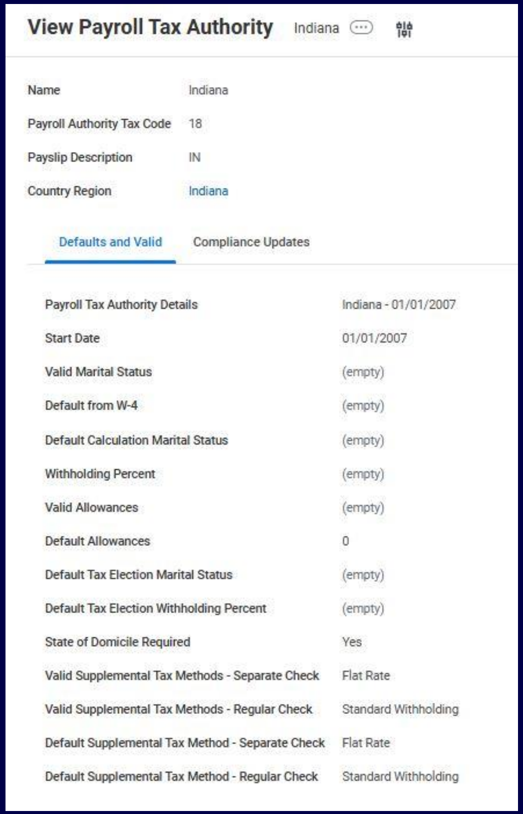
Automatically available

SUI Tax Deduction

Impact analysis

Before the release



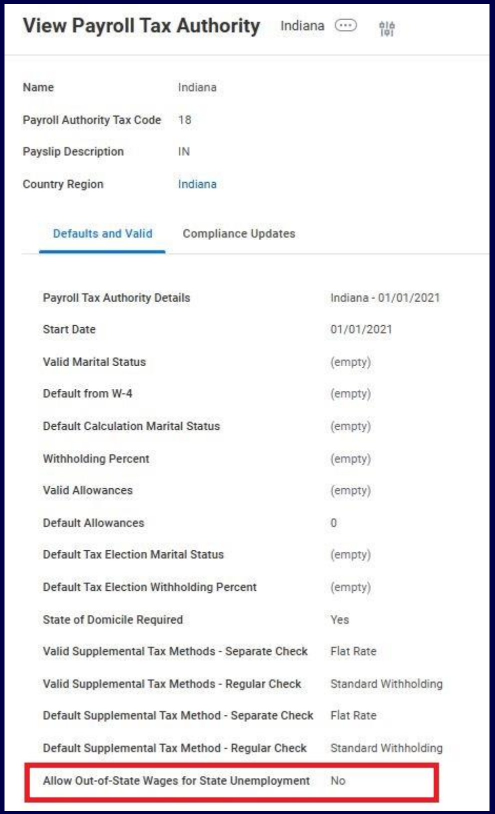
View Payroll Tax Authority Indiana

Name	Indiana
Payroll Authority Tax Code	18
Payslip Description	IN
Country Region	Indiana

Defaults and Valid | Compliance Updates

Payroll Tax Authority Details	Indiana - 01/01/2007
Start Date	01/01/2007
Valid Marital Status	(empty)
Default from W-4	(empty)
Default Calculation Marital Status	(empty)
Withholding Percent	(empty)
Valid Allowances	(empty)
Default Allowances	0
Default Tax Election Marital Status	(empty)
Default Tax Election Withholding Percent	(empty)
State of Domicile Required	Yes
Valid Supplemental Tax Methods - Separate Check	Flat Rate
Valid Supplemental Tax Methods - Regular Check	Standard Withholding
Default Supplemental Tax Method - Separate Check	Flat Rate
Default Supplemental Tax Method - Regular Check	Standard Withholding

After the release



View Payroll Tax Authority Indiana

Name	Indiana
Payroll Authority Tax Code	18
Payslip Description	IN
Country Region	Indiana

Defaults and Valid | Compliance Updates

Payroll Tax Authority Details	Indiana - 01/01/2021
Start Date	01/01/2021
Valid Marital Status	(empty)
Default from W-4	(empty)
Default Calculation Marital Status	(empty)
Withholding Percent	(empty)
Valid Allowances	(empty)
Default Allowances	0
Default Tax Election Marital Status	(empty)
Default Tax Election Withholding Percent	(empty)
State of Domicile Required	Yes
Valid Supplemental Tax Methods - Separate Check	Flat Rate
Valid Supplemental Tax Methods - Regular Check	Standard Withholding
Default Supplemental Tax Method - Separate Check	Flat Rate
Default Supplemental Tax Method - Regular Check	Standard Withholding
Allow Out-of-State Wages for State Unemployment	No

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Automatically available

SUI Tax Deduction

Impact analysis

Before the release

Related Calculations 6 items

			Limit Details				Limit Filter Worktags					
Related Calculation	Default Calculation	Override Calculation	Value	Balance Period	Based On	Include Values from Related Companies	Default Filter Worktags	Condition	Conditional Filter Worktags	Input Allowed?	Aggregate	Do Not Store / Do N
Gross Wages		SUI/SUI (ER) Gross Wages by Company/State (if not exempt)	Tax Calc: Tax Wage Limit of 999,999,999 (if not exempt)	YTD - Current Calendar Year (based on Payment Date)	SUI (ER) [USA] - Gross Wages		Company State			Yes	No	Do Not Sto Do Not Sto
Subject Wages		SUI/SUI (ER) Wages by Company/State (if not exempt)	Tax Calc: Tax Wage Limit of 999,999,999 (if not exempt)	YTD - Current Calendar Year (based on Payment Date)	SUI (ER) [USA] - Subject Wages		Company State			Yes	No	Do Not Sto Do Not Sto
Hours Worked		Reporting: SUI Hours Worked by Company [USA]								Yes	No	Do Not Sto Do Not Sto
Taxable Wages		SUI/SUI (ER) Taxable Wages by Company/State (if not exempt)	Tax Calc: Tax Wage Limit	YTD - Current Calendar Year (based on Payment Date)	SUI (ER) [USA] - Taxable Wages	Not CPM OR Company and State is configured for CPM	Company	Tax Calc (SUI ER): Primary Work State = IN, LA, MA, MN or MT	Company State	Yes	No	Do Not Sto Do Not Sto
Subject Wage Limit		Not Used in Calculation/Not Persisted								No	No	Do Not Sto Do Not Sto
Tax Wage Limit		Tax Calc: Tax Wage Limit								No	No	Do Not Sto Do Not Sto

After the release

Related Calculations 6 items

			Limit Details				Limit Filter Worktags				
Related Calculation	Default Calculation	Override Calculation	Value	Balance Period	Based On	Include Values from Related Companies	Default Filter Worktags	Condition	Conditional Filter Worktags	Input Allowed?	Aggregate
Gross Wages		SUI/SUI (ER) Gross Wages by Company/State (if not exempt)	Tax Calc: Tax Wage Limit of 999,999,999 (if not exempt)	YTD - Current Calendar Year (based on Payment Date)	SUI (ER) [USA] - Gross Wages		Company State			Yes	No
Subject Wages		SUI/SUI (ER) Wages by Company/State (if not exempt)	Tax Calc: Tax Wage Limit of 999,999,999 (if not exempt)	YTD - Current Calendar Year (based on Payment Date)	SUI (ER) [USA] - Subject Wages		Company State			Yes	No
Hours Worked		Reporting: SUI Hours Worked by Company [USA]								Yes	No
Taxable Wages		SUI/SUI (ER) Taxable Wages by Company/State (if not exempt)	Tax Data: Wage Limit, reduced by SUI(ER) TAXABLE WAGES previously paid to states other than current, or zero if negative or exempt	YTD - Current Calendar Year (based on Payment Date)	SUI (ER) [USA] - Taxable Wages	Not CPM OR Company and State is configured for CPM	Company	1=1 (True)	Company State	Yes	No
Subject Wage Limit		Not Used in Calculation/Not Persisted								No	No
Tax Wage Limit		Tax Calc: Tax Wage Limit								No	No

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Rounding Recovery for Ongoing Multiple Work Jurisdictions (OMWJ)

What's changing

Workday now applies rounding recovery for flat amount benefits and one-time payments, when you configure earnings or deductions to:

- Disable Do Not Apply Percentage Splits on the pay component and;
- Enable Do Not Apply Percentage Splits in the Related Calculations grid for all pay component related calculations (or related calculations if you select None of the Above for US Override Related Calculation for Multiple Jurisdictions).

Additional considerations

N/A

What do I need to do

As a result of architectural design changes to pay calculation, Workday recommends you to carefully review your payroll results regardless of whether you use OMWJ elections or not.

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/paywdcore/8524393.html

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Rounding Recovery for Ongoing Multiple Work Jurisdictions (OMWJ)

Impact analysis

Before the release	After the release
Before the release, Workday did not apply rounding recovery for flat amount benefits and one-time payments, when you configure earnings or deductions to: Disable **Do Not Apply Percentage Splits** on the pay component and Enable **Do Not Apply Percentage Splits** in the **Related Calculations** grid for all pay component related calculations.	After the release, Workday applies rounding recovery for flat amount benefits and one-time payments, when you configure earnings or deductions to: Disable **Do Not Apply Percentage Splits** on the pay component and Enable **Do Not Apply Percentage Splits** in the **Related Calculations** grid for all pay component related calculations (or related calculations if you select **None of the Above** for **US Override Related Calculation for Multiple Jurisdictions**).

Impact description

This feature may impact retro calculations on results that were completed prior to the feature delivery. With this feature, tax authorities may now be evaluated for OMWJ in a different order than they were originally, in which case rounding recovery may be applied to a different tax authority. When this occurs, you will see a retro difference where pennies are deducted from one tax authority and applied to another, but the total amount will remain the same for the pay component.

https://doc.workday.com/release-notes/en-us/paywdcore/8524393.html

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Pay Group and Pay Component Summary Reports

What's Changing

Workday deliver new standard reports that you can use for a summarized view of your pay groups and pay components.

What do I need to do

This feature is automatically available.

Additional Considerations

Enables you to easily view summaries and details.

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/paywdcore/8689369.html

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Pay Group and Pay Component Summary Reports

Impact analysis

Before the release	After the release
No existing standard reports.	Workday deliver 2 new standard reports (secured to the existing *Reports: Pay Calculation Results for Pay Group (Results)* domain) for Payroll administrators and partners: •Payroll Pay Group Summary •Payroll Pay Component Summary

Impact description
This feature is automatically available.

https://doc.workday.com/release-notes/en-us/paywdcore/8689369.html

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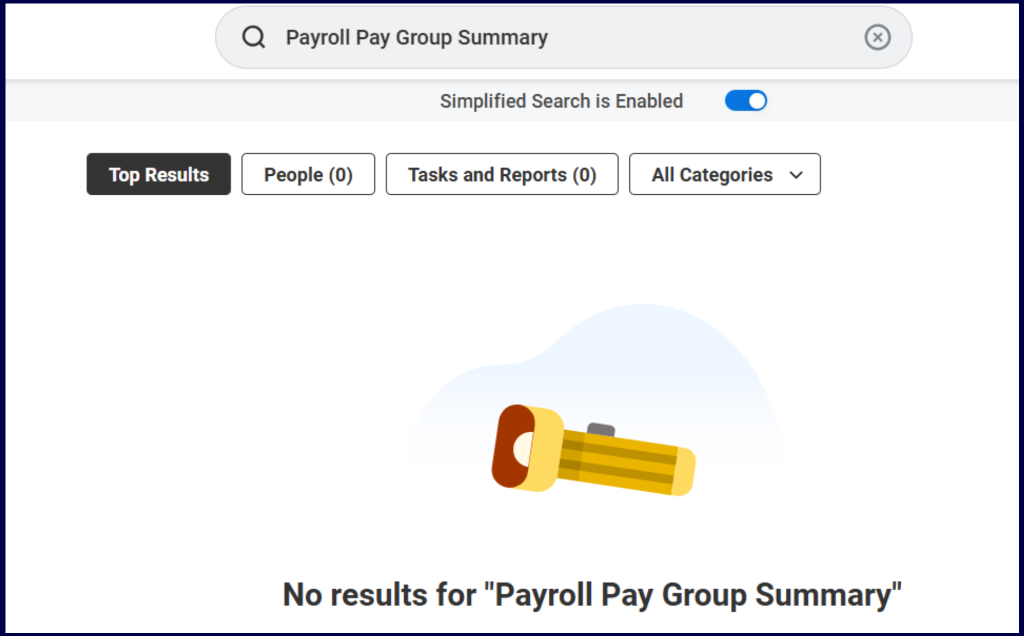
Automatically available

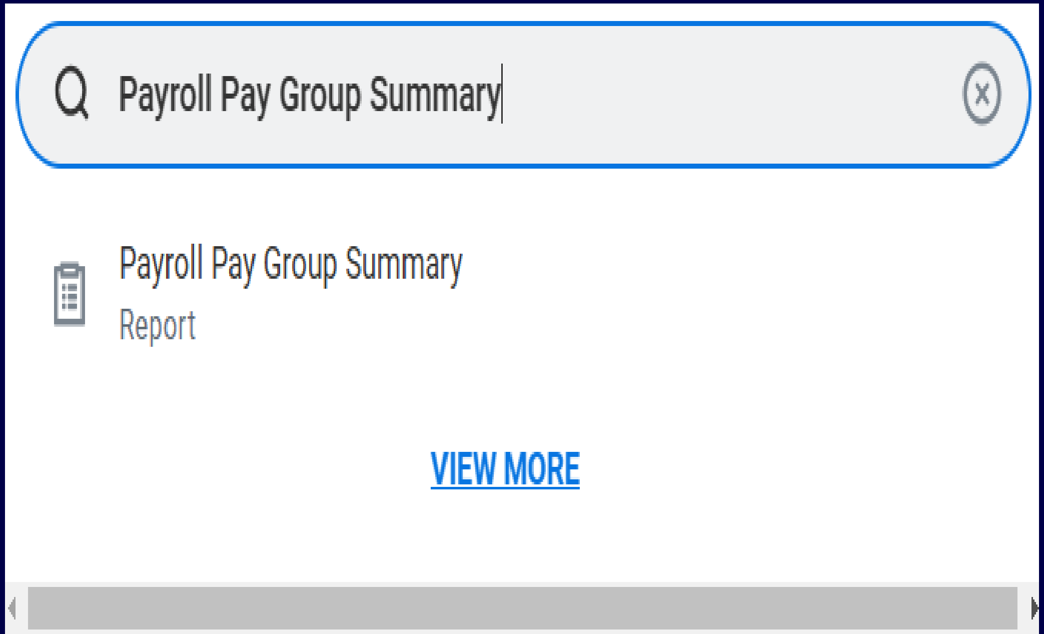
Pay Group and Pay Component Summary Reports

Impact analysis

Before the release



After the release



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Data Entry Checking and Payroll Input

What's Changing

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

Additional Considerations

This update enables you to reduce errors in manual payroll inputs before you calculate payroll, saves you time when auditing for errors in payroll input, and ensures payroll input amounts are within standard deviations.

What do I need to do

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

What happens if I do nothing

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

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

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Data Entry Checking and Payroll Input

Impact analysis

Before the release	After the release
No Data Entry Check Options section to the Edit Tenant Setup - Payroll task.	Workday deliver the Data Entry Check Options section to the Edit Tenant Setup - Payroll task. Use this section to configure messaging preferences for Payroll Input data entry checking. You can select these options: Switch on Data Entry Check everywhere. When enabled, you will receive data entry check messages from all areas of Payroll that are enabled for the feature. Select areas to switch on Data Entry Check. If you turn off messaging for data entry check everywhere in Payroll, you can use this option to choose which areas to receive messages. Edit Tenant Setup - Payroll Web Services Workday update these web services as part of this feature: Get Edit Tenant Setup - Payroll Put Edit Tenant Setup - Payroll

Impact description
This feature is automatically available.

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

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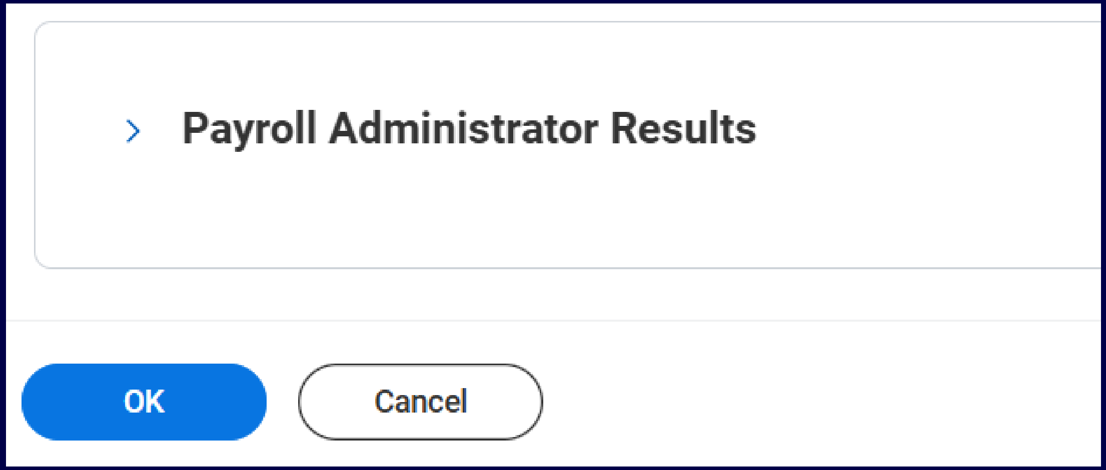
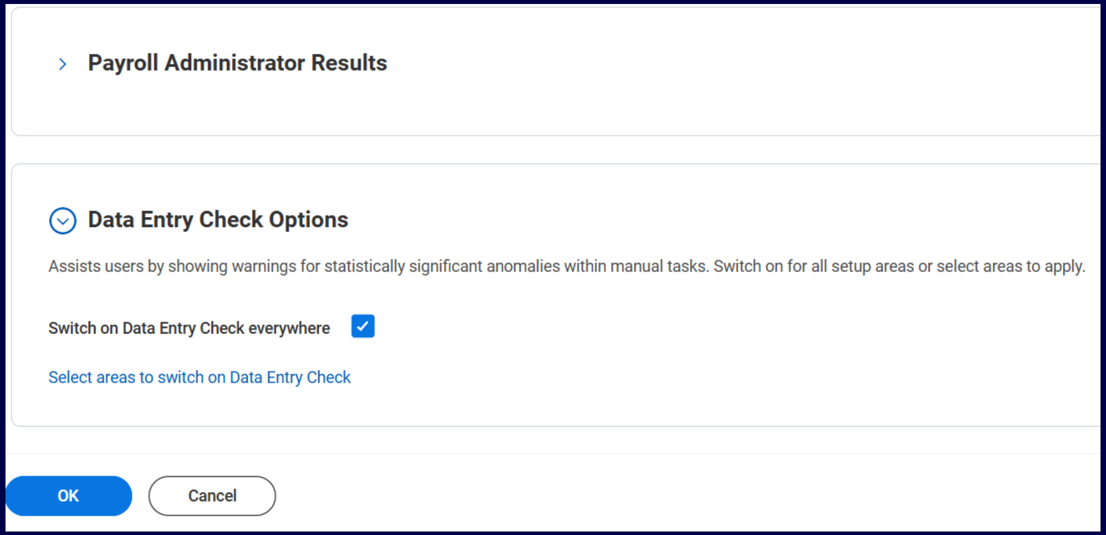
Data Entry Checking and Payroll Input

Impact analysis

Before the release



After the release



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Period Schedule and Holiday Calendar

What's Changing

- Workday deliver updates to the Period Schedule tasks to enable you to configure holiday calendars with your period schedules.
- These updates reduce manual effort by automatically adjusting payment dates that occur on holidays when you add a holiday calendar to a period schedule

Additional Considerations

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

What do I need to do

Automatically Available

What happens if I do nothing

N/A

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

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Automatically Available

Period Schedule and Holiday Calendar

Impact analysis

Before the release	After the release
No Holiday Calendar field (secured to the *Set Up: Period Schedule* domain) in the Payment Date Auto-Adjust	Workday deliver the Holiday Calendar field (secured to the *Set Up: Period Schedule* domain) in the Payment Date Auto-Adjust section of these tasks: Create a Period Schedule Create Additional Period Schedule Edit a Period Schedule Edit Additional Period Schedule View a Period Schedule This field enables you to add holiday calendars to your period schedules so that you can automatically adjust payment dates that occur on holidays. You can select only one holiday calendar at a time.

Impact description
This feature is automatically available.

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

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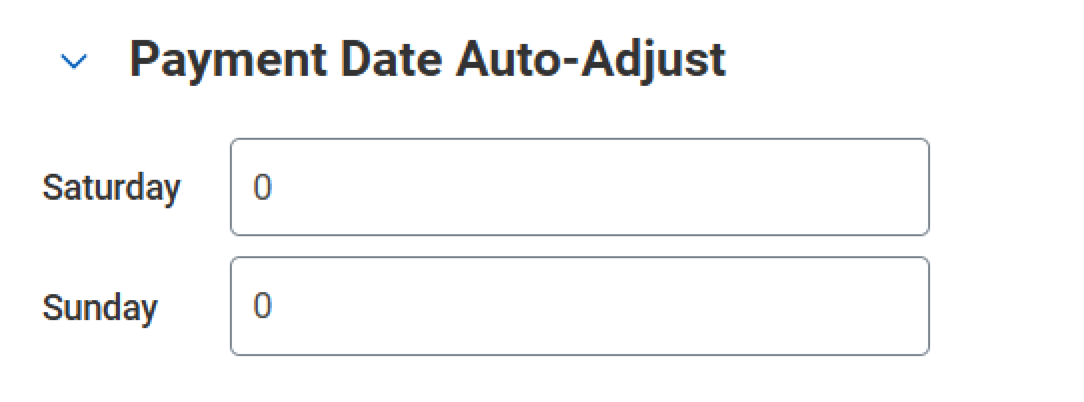
Automatically available

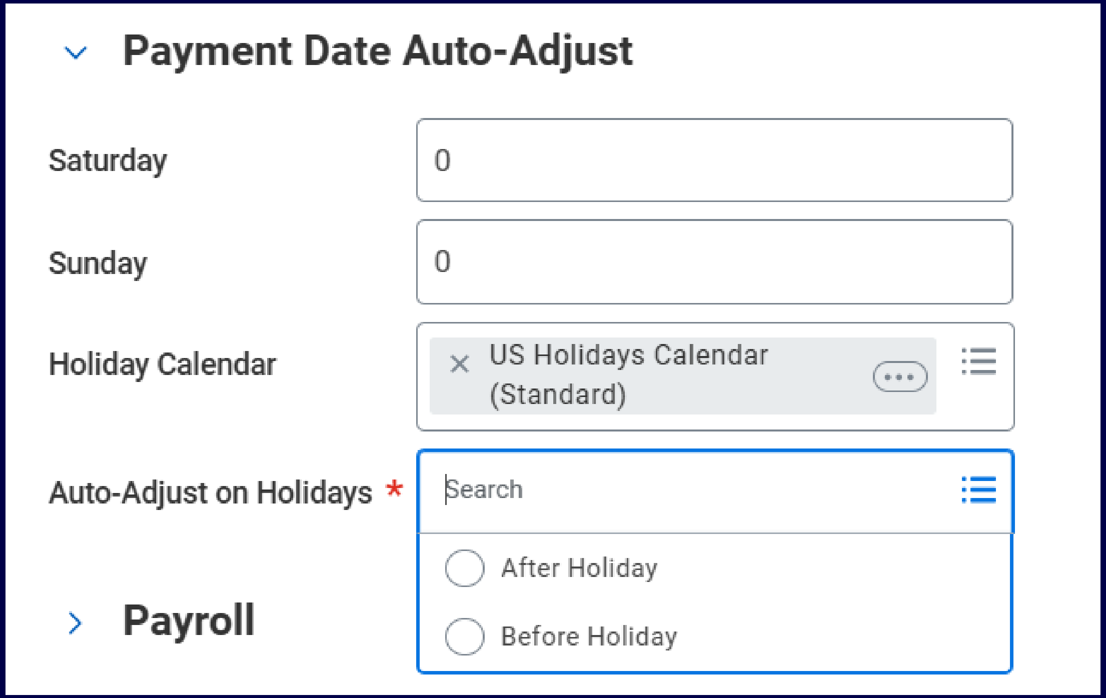
Period Schedule and Holiday Calendar

Impact analysis

Before the release



After the release



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Benefits and Pay Hub Enhancements

What's Changing

In preparation for the future retirement of the Pay worklet, Workday update the Benefits and Pay Hub to allow you to view relevant pay and benefits information.

What do I need to do

Automatically Available

Additional Considerations

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.

What happens if I do nothing

N/A

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

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Automatically Available

Benefits and Pay Hub Enhancements

Impact analysis

Before the release	After the release
No existing sections on Benefits and Pay Hub before release.	Workday deliver the Disable Pay Worklet Checkbox. Workday deliver the Accounts section to the Benefits and Pay Hub, in the Pay > Payments > Payment Elections section. Workday deliver buttons to the Benefits and Pay Hub for workers in Canada and the U.S. in the Pay > Tax section: Workday deliver the Withholding Elections button to the Benefits and Pay Hub in the Overview > Tasks and Reports section. Workers in Canada and the U.S. can click this button to quickly access their tax withholdings information. Workday deliver the View Arrears Details card to the Benefits and Pay Hub on the Overview page. Workday deliver the Switch Positions button to the Benefits and Pay Hub in the Pay > Tax Elections section for workers in Canada and the U.S. with multiple jobs.

Impact description
This feature is automatically available.

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

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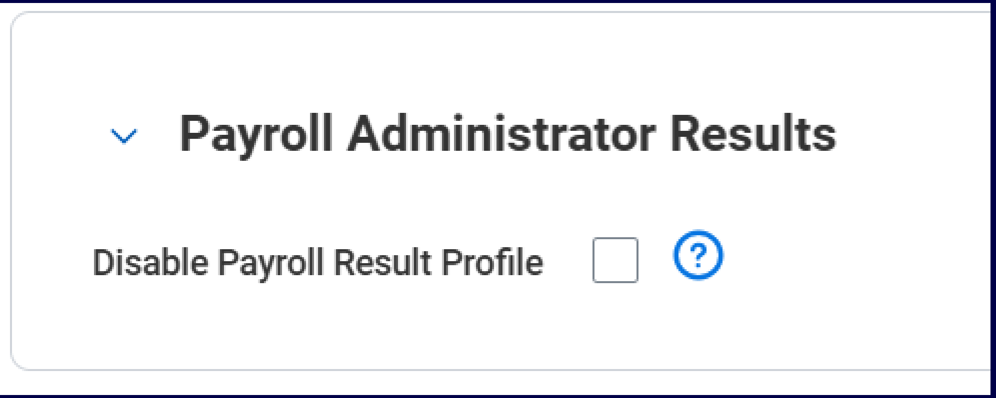
Automatically available

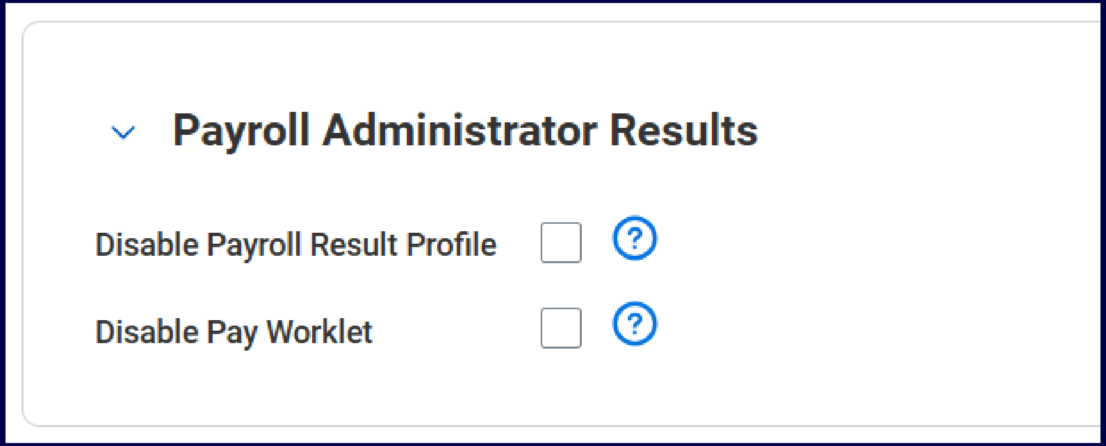
Benefits and Pay Hub Enhancements

Impact analysis

Before the release



After the release



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Retro Processing and Gross – to – Net Proration

What's Changing

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

What do I need to do

Automatically Available

Additional Considerations

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

What happens if I do nothing

N/A

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

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Payroll Calculation Errors

What's Changing

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

What do I need to do

Automatically Available

Additional Considerations

Workday update Workday instances so that when you run pay and retro calculations and receive an error message, that message displays only once.

What happens if I do nothing

N/A

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

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Payroll Calculation Errors

Impact analysis

Before the release	After the release
Before release, you will see same error message 4 times.	If you have 4 instances, you'll see an error message once for all 4 instances, rather than seeing the same error message 4 times.

Impact description
This feature is automatically available.

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

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Automatically available

Payroll Calculation Errors

Impact analysis

Before the release

Errors

1. Employees to Calculate
   One of the following options must be selected:
   Smart Retro
   Smart Retro by Events
   Calculation Statuses
   Workers
2. Workers
   The field Workers is required and must have a value.

After the release

Error

1. Employees to Calculate
   One of the following options must be selected:
   Smart Retro
   Smart Retro by Events
   Calculation Statuses
   Workers
   Comma Separated Employee IDs

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Comma Separated Employee IDs on Run Retro Pay Calculation

What's Changing

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

Additional Considerations

Improves performance and runtime of retro pay calculations.

What do I need to do

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

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

What happens if I do nothing

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

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

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Automatically Available

Comma Separated Employee IDs on Run Retro Pay Calculation

Impact analysis

Before the release	After the release
Before release, you will enter workers name or number one at a time on the Worker field.	Workday add a new **Comma Separated Employee IDs** field to the **Run Retro Pay Calculation** task. When you enter a string of employee IDs separated by commas, Workday runs a retro pay calculation for the valid IDs that you enter from the pay group that correspond to workers who have supported retro events. Workday validates every employee ID that you enter. Expect longer validation times for large quantities of employee IDs.

Impact description
This feature is automatically available.

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

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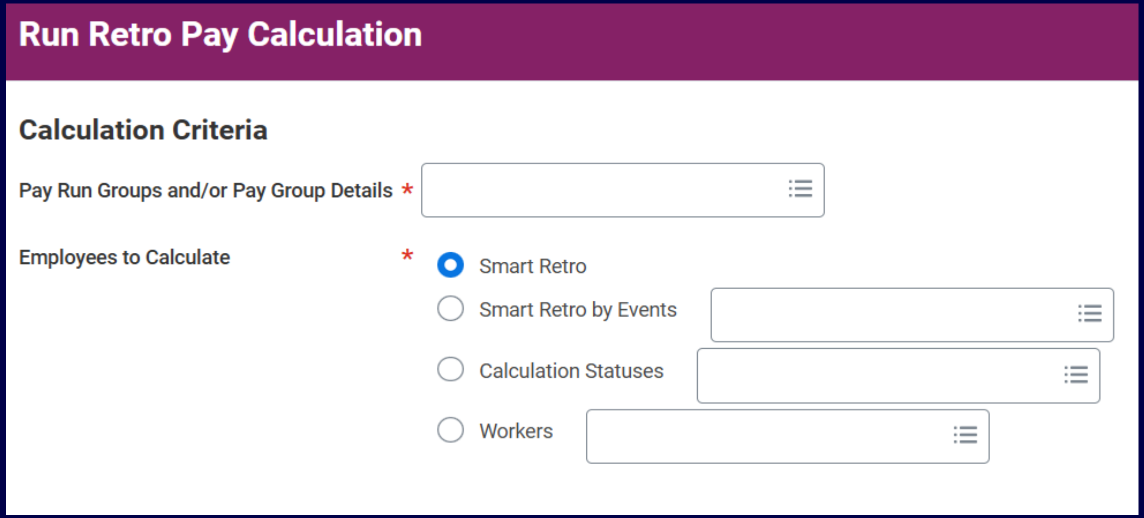
Automatically available

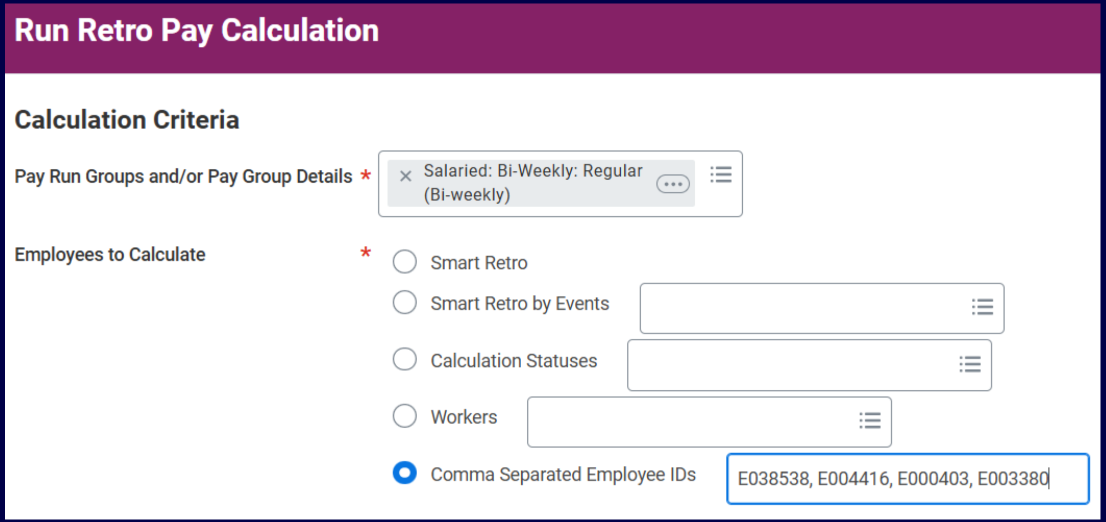
Comma Separated Employee IDs on Run Retro Pay Calculation

Impact analysis

Before the release



After the release



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Connecticut State Tax Elections

What's Changing

Workday update payroll tax data for the state of Connecticut.

Additional Considerations

- These updates help you:
- Report Connecticut workers with *Withholding Code "E"* state tax elections.
- Create new non-exempt tax elections if the exempt election previously expired.

What do I need to do

Automatically Available

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/paywdusa/8030606.html

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Automatically Available

Connecticut State Tax Elections

Impact analysis

Before the release	After the release
N/A	Workday update the Add Workers US Tax Election for Expiring Exempt report to now display workers who have a Connecticut withholding tax election with *Withholding Code "E"*. When you select Create Default Tax Election, Workday creates a new effective Connecticut tax election with a blank Withholding Code and no other fields populated.

Impact description
This feature is automatically available.

https://doc.workday.com/release-notes/en-us/paywdusa/8030606.html

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State Other Taxes

What's Changing

Workday update payroll tax data and related tax calculations for state other tax authorities.

Additional Considerations

These updates help support you reporting state other taxes for payroll.

What do I need to do

Automatically Available

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/paywdusa/8540017.html

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State Other Taxes

Impact analysis

Before the release	After the release
N/A	Workday update the tax calculations for these payroll other taxes and tax deductions to now resolve based on the **Sub Period End Date** of the pay period instead of the payroll payment date:

Impact description
This feature is automatically available.

https://doc.workday.com/release-notes/en-us/paywdusa/8540017.html

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Do Not Apply Percentage Splits for Ongoing Multiple Work Jurisdictions (OMWJ)

What’s Changing

Workday improve the pay component configuration for workers with multiple work jurisdictions.

Additional Considerations

Workday simplify the pay component configuration so that Workday now automatically applies the pay component to the default work state. You no longer need to enter a pay input override with the default state worktag.

What do I need to do

Automatically Available

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/paywdinput/8557148.html

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Do Not Apply Percentage Splits for Ongoing Multiple Work Jurisdictions (OMWJ)

Impact analysis

Before the release	After the release
N/A	When you enable Do Not Apply Percentage Splits for a pay component and its related calculations on the Effective Dated tab of the Create Earning or Create Deduction tasks; Workday now automatically resolves the pay component in a single result line and applies the earning or deduction to the worker’s default work tax authority without the need for a state worktag. Enabling Do Not Apply Percentage Splits may impact retro result lines by creating negative and positive retro result lines for the pay component resulting in a net zero difference.

Impact description
This feature is automatically available.

https://doc.workday.com/release-notes/en-us/paywdinput/8557148.html

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Payroll Input Business Process

What's Changing

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

What do I need to do

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

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

Additional Considerations

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 happens if I do nothing

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

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

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Setup required

Payroll Input Business Process

Impact analysis

Before the release	After the release
No Business Process: Request Payroll Input Event before release.	Workday deliver the new *Request Payroll Input Event* business process, which enables payroll practitioners to request payroll inputs for workers. You can use the new **Request Payroll Inputs** task to initiate the business process and to submit multiple payroll input requests at once.

Impact description
Setup required is needed if you need to utilize the business process.

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

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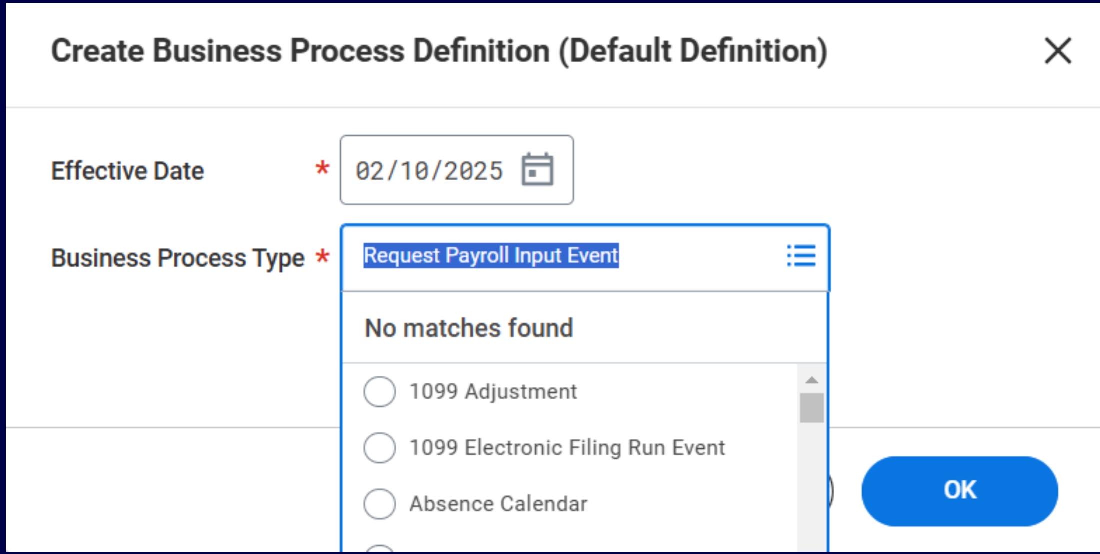
Setup required

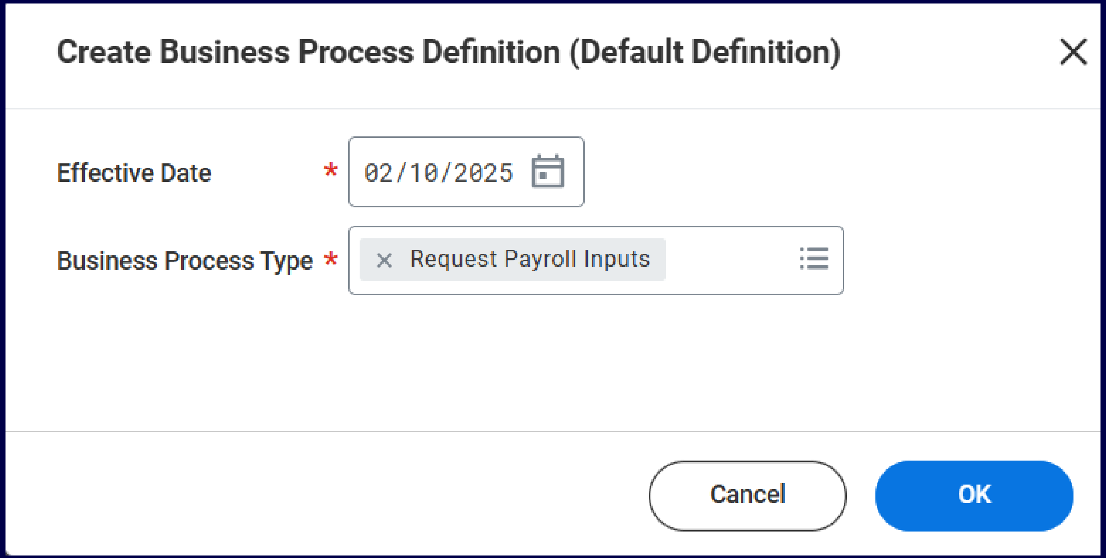
Payroll Input Business Process

Impact analysis

Before the release



After the release



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Global Payroll Hub Updates

What's Changing

As part of Global Payroll Connect, Workday continues to update the Global Payroll Hub (GPH), providing you with a centralized view of payroll where you can view and take action on real-time, vendor-provided payroll data for multiple third-party systems in 1 place.

Additional Considerations

Workday continue to improve the payroll experience for multiple countries by reducing the time and effort to log into multiple third-party payroll systems to get information about payroll processing and perform time sensitive actions.

What do I need to do

N/A

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/payexternal/8180532.html

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Setup required

Global Payroll Hub Updates

Impact analysis

Before the release	After the release
N/A	Display Languages Global Payroll Hub displays the user's preferred language, where indicated. When the user doesn't select a preferred language, Workday displays the content in the selected language of the organization. Third-party payroll vendor data appears in the language it is delivered in. Accessibility With this release, Workday add alternative text descriptions (alt text) for each graphic element in GPH to enhance accessibility and improve the user experience.

Impact description
A user sets their Preferred Display Language to French. When they view the Global Payroll Hub, they see Workday labels in French and Workday requests third-party payroll data in French. If the third-party payroll vendor doesn't translate data, the user sees 2 languages in Global Payroll Hub.

https://doc.workday.com/release-notes/en-us/payexternal/8180532.html

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Salary Over the Cap Default Costing Allocations

What's Changing

With this release, Workday deliver a new Salary Over the Cap Default Costing Allocations section on the Assign Costing Allocations task.

Additional Considerations

You can use the Salary Over the Cap Default Costing Allocations Details grid to more easily specify default Salary Over the Cap costing allocations.

What do I need to do

To enable the Salary Over the Cap Default Costing Allocation Details grid:

Access the Maintain Worktag Usage report.

1. Select Payroll Costing Allocation.
2. Click Edit Worktag Usage.
3. On the Additional Worktag Types grid, add Grant as a required worktag.

Select Salary Over the Cap - Enable on the Grants/Awards tab of the Maintain Payroll Accounting Options task.

Create Salary Caps.

What happens if I do nothing

If you enable the grid, but do not specify any default Salary Over the Cap costing allocations or costing allocation overrides, then Workday costs the over-the-cap portion of the worker's salary to their default organizational assignments.

https://doc.workday.com/release-notes/en-us/paywdacct/8720455.html

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Salary Over the Cap Default Costing Allocations

Impact analysis

Before the release	After the release
N/A	Workday add a new Salary Over the Cap Default Costing Allocation Details grid to Assign Costing Allocation (both the task and business process step), enabling you to specify default Salary Over the Cap costing allocations.

Impact description
If you have an existing Salary Over the Cap costing allocation that you use for all of your allocations, you could remove it and add it to the new grid to simplify your costing allocations. You can then use the Salary Over the Cap button for override costing allocations only.

https://doc.workday.com/release-notes/en-us/paywdacct/8720455.html

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Setup required

Object Transporter for Payroll

What's Changing

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

Additional Considerations

This update improves your ability to migrate Payroll configuration data and objects from one tenant to another, either individually or as part of a configuration package.

What do I need to do

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

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/paywdacct/8720455.html

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Setup required

Object Transporter for Payroll

Impact analysis

Before the release	After the release
Before release, new payroll objects is not using Object Transporter to migrate to necessary tenants.	With this update, Workday enables you to migrate these Payroll objects between tenants using the new Object Transporter: Net Pay Validation and Arrears Pay Component Groups Pay Component Security Segment Pay Groups Run Categories Tax Authority Exceptions Pay Component Groups Tax authority pay component group exceptions won't create new earnings, deductions, or pay component groups that aren't already in the target tenant.

Impact description
New payroll objects can be migrated using Object Transporter.

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

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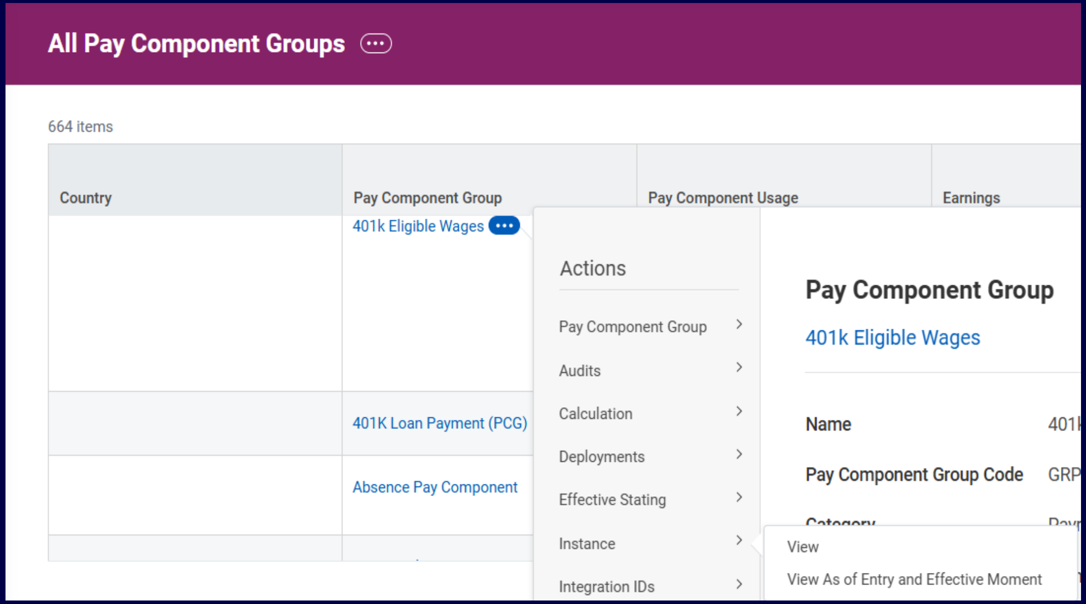
Setup required

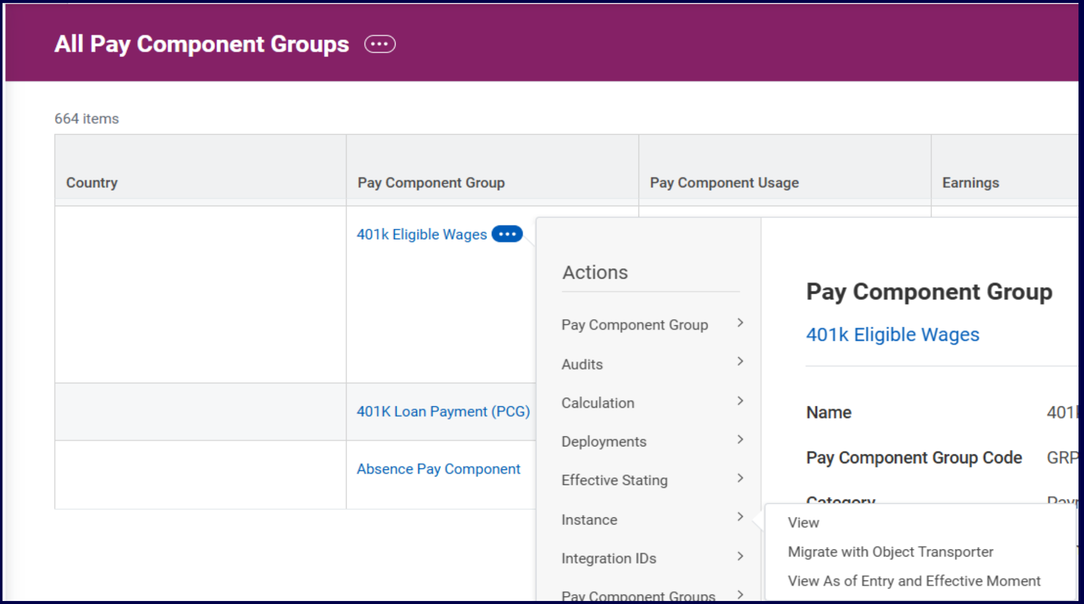
Object Transporter for Payroll

Impact analysis

Before the release



After the release



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Payroll Category & Country Segment Security

What's changing

With this release, Workday enable you to configure access to category-specific and country-specific fields that users can select on certain payroll tasks.

Additional considerations

Workday update these security domains:

- Access Calculation (Segmented) domain (secured to the Core Payroll, Implementation, Payroll Interface, and Time Off and Leave functional areas)
- Access Payroll Country (Segmented) domain (secured to the Core Payroll, Implementation, and Payroll Interface functional areas)

What do I need to do

If you have completed the setup instructions on the Calculation Engine Security and Payroll Country Segmented Security features, then the new functionality is already available in your tenant.

What happens if I do nothing

Your users will have the same access as before and be able to select options for all categories and countries from the fields on the affected tasks and reports. If you don't want to use segmented security, you don't need to configure either the Access Calculation (Segmented) domain or the Access Payroll Country (Segmented) domain, because both use the All Users group by default.

https://doc.workday.com/release-notes/en-us/paywdarch/8693305.html

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Payroll Category & Country Segment Security, cont.

Additional considerations

Now you're able to configure the security of these fields that might appear on the tasks and reports from the attached list:

- Lookup Tables
- Balance Periods
- Step-based Conditions
- Step-based Condition Groups
- Payroll Calculations: Earnings
- Deductions
- Pay Accumulations
- Pay Balances
- Pay Component Groups
- Pay Component Related Calculations

What do I need to do

To enable this feature, you must create two segment-based security groups. You must give one group access to the Access Calculation (Segmented) domain and you must give the other group access to the Access Payroll Country (Segmented) domain. See: Create Segment-Based Security Groups.

- From the Type of Tenanted Security Group field, select Segment-Based Security Group.
- From the Security Groups field, select the same security groups for both domains.
  - Example: If you specify Payroll Administrator for Access Calculation (Segmented), also specify Payroll Administrator for Access Payroll Country (Segmented).

https://doc.workday.com/release-notes/en-us/paywdarch/8693305.html

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Payroll Category & Country Segment Security, cont.

Additional considerations

Workday applies both category-segmented and country-segmented security to these fields when they appear on the tasks and reports from the attached list. This restricts the options that Workday displays on these fields based on the user's security configuration.

What do I need to do

- From the Access to Segments field, select Security Segments (Workday Owned) then:
  - Calculation Security Segment for the group you need to add to the Access Calculation (Segmented) domain.
  - Payroll Country Security Segment (Workday Owned) for the group you need to add to the Access Payroll Country (Segmented) domain.

When you edit the permissions on the two domains, Workday recommends removing the All Users group and adding the relevant segment-based security groups that you create as well as the Implementers group to these grids:

- Report/Task Permissions
- Integration Permissions

https://doc.workday.com/release-notes/en-us/paywdarch/8693305.html

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Payroll Category & Country Segment Security

Impact analysis

Before the release	After the release

Before the release, you were not able to configure access to category-specific and country-specific fields that users can select on certain payroll tasks.	After the release, Workday enables you to configure access to category-specific and country-specific fields listed below:
	Lookup Tables
	Balance Periods
	Step-based Conditions
	Step-based Condition Groups
	Payroll Calculations:
	    Earnings
	    Deductions
	    Pay Accumulations
	    Pay Balances
	    Pay Component Groups
	    Pay Component Related Calculations

Impact description
This feature ensures that administrators can only access calculations and countries within their area

https://doc.workday.com/release-notes/en-us/paywdarch/8693305.html

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Payroll Country Segment Security on Task Fields

What's changing

With this release, Workday enable you to configure access to country-specific fields that users can select on certain payroll tasks.

Additional considerations

Workday update the Access Payroll Country (Segmented) domain (secured to the Core Payroll, Implementation, and Payroll Interface functional areas) to enable you to configure security on these fields that might appear on the tasks from the attached list:

- Pay Groups
- Pay Group Details
- Pay Run Groups
- Deduction Recipients
- Run Categories

What do I need to do

If you have completed the setup instructions on the Payroll Country Segmented Security feature, then the new functionality is already available in your tenant.

What happens if I do nothing

Your users will have the same access as before and be able to select the options for all countries on the configurable fields on the affected tasks. If you don't want to use segmented security, you don't need to configure the Access Payroll Country (Segmented) domain, because it uses the All Users group by default.

https://doc.workday.com/release-notes/en-us/paywdarch/8676850.html

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Payroll Country Segment Security on Task Fields, cont.

What do I need to do

To enable this feature, you must create segment-based security groups and give those groups access to the Access Payroll Country (Segmented) domain. See: Create Segment-Based Security Groups.

From the Type of Tenanted Security Group field, select Segment-Based Security Group.

From the Access to Segments field, select Security Segments (Workday Owned) > Payroll Country Security Segment (Workday Owned).

When you edit permissions on the Access Payroll Country (Segmented) domain, Workday recommends removing the All Users group and adding both the segment-based security groups that you create and the Implementers group to these grids:

- Report/Task Permissions
- Integration Permissions

https://doc.workday.com/release-notes/en-us/paywdarch/8676850.html

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Setup required

Payroll Category & Country Segment Security on Task Fields

Impact analysis

Before the release	After the release
Before the release, you were not able to configure access to country-specific fields that users can select on certain payroll tasks.	After the release, Workday enables you to configure country-specific security to fields listed below: Pay Groups Pay Group Details Pay Run Groups Deduction Recipients Run Categories

Impact description
If you enable this feature, you will be able to enhance security by restricting access to certain country selections based on user roles.

https://doc.workday.com/release-notes/en-us/paywdarch/8676850.html

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Payslip Timing

What's changing

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

What do I need to do

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

- Create Payroll Action Reason
- Edit Payroll Action Reason

Additional considerations

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

What happens if I do nothing

N/A

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

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Setup required

Payslip Timing

Impact analysis

Before the release	After the release
Before the release, the Payslip Visibility Time Override was not available on the Create/Edit Payroll Action reasons task.	After the release, the Payslip Visibility Time Override is added on the Create/Edit Payroll Action reasons task.

Impact description

If you enable this feature, you will be able to configure what time payslips from on-demand payments are visible to workers through web services.

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

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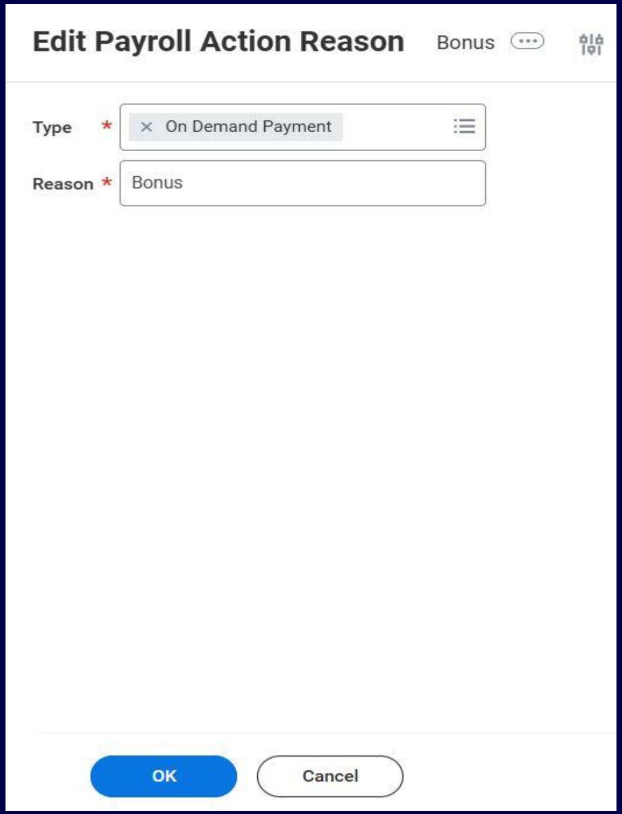
Setup required

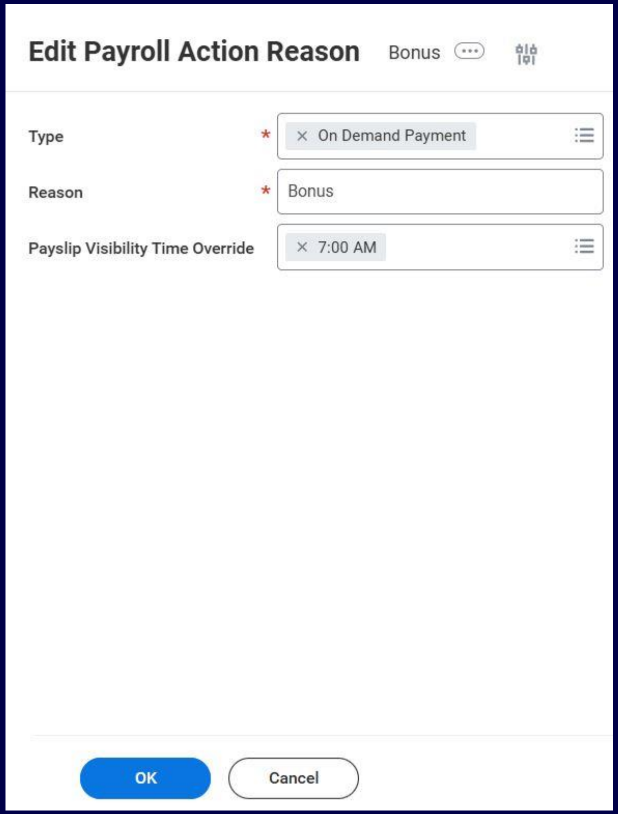
Payslip Timing

Impact analysis

Before the release



After the release



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Convenience of Employer Rule

What's changing

Workday delivers the ability to configure a convenience of employer (COE) rule for your payroll tax setup. You can use the COE rule to support workers who work in and are taxed in a different state from their company

Additional considerations

- Workday delivers a new Enable Convenience of Employer Rule check box on the Edit Company Federal US Tax Reporting task. Effective 2024-01-01, you can use this check box to enable a COE rule for your company.
- Workday also delivers a new Convenience of Employer tab on the Add Worker US Tax Elections task. You can use this tab to define these details for remote workers who work in a state that requires a COE rule:
-

What do I need to do

To enable this feature, you must:

- Enable the COE rule for your company. Access the Edit Company Federal US Tax Reporting task.
- Select the Enable Convenience of Employer Rule check box.
- Define the states in the COE rule for your worker. Access the Add Worker US Tax Elections task.
- On the Convenience of Employer tab, enter the details for the COE rule.

What happens if I do nothing

If you choose to do nothing, you'll continue to either:

- Set up an ongoing multiple work jurisdiction for the state that work is directed from.
- Manually process taxes for workers who work remotely.

https://doc.workday.com/release-notes/en-us/paywdusa/7492309.html

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Convenience of Employer Rule, cont.

Additional considerations

- The state where work is directed from, or the physical company location.
- The state of remote work, or the physical location where the employee works.
- This new tab only displays if you have selected the Enable Convenience of Employer Rule check box on the Edit Company Federal US Tax Reporting task.
  You can only configure:
  - 1 COE rule for a worker at a time.
  - A COE rule that's effective on or after 2024-01-01.
- After you enable and configure the COE rule, Workday uses the COE states to determine the tax calculation for the worker.

Note that the COE rule isn't supported for:

- Companies in single legal entity (SLE) company relationships if the companies have different tax reporting setup.
- Copied tax elections.
- Exemptions for MSRR or for Fort Campbell in Kentucky.
- Local taxes.

What do I need to do

For companies that you want to enable a COE rule for and that are also part of a SLE company relationship, verify that all the companies have the same tax reporting setup.
To process payroll for workers with retroactive changes after you've enabled your COE rule, create an on-demand additional payment to change the tax authorities

https://doc.workday.com/release-notes/en-us/paywdusa/7492309.html

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Convenience of Employer Rule, cont.

Additional considerations

Multiple states where work is directed from.

- Nonresident alien workers.
- Prior period tax adjustments.

Retroactive changes to the COE rule. If you make retroactive changes to the worker’s tax elections, the tax elections use the current COE rule.

- Tip wages.
- Trailing payments.
- U.S. territories.

Workers who have an international assignment position.

https://doc.workday.com/release-notes/en-us/paywdusa/7492309.html

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Setup required

Convenience of Employer Rule

Impact analysis

Before the release	After the release
Before the release, the Enable Convenience of Employer Rule check box was not available on the Edit Company Federal US Tax Reporting. You could not add Convenience of Employer details on the Add Worker US Tax election task.	After the release, the Enable Convenience of Employer Rule check box is available to configure on the Edit Company Federal US Tax Reporting. You can now add details of State Work is Directed from and State of Remote Work on the Convenience of Employer tab in the Add Worker US Tax election task.

Impact description
This feature enables you to set up a COE rule and to define the COE states for your remote workers' tax elections. This helps you comply with different state requirements for tax reporting

https://doc.workday.com/release-notes/en-us/paywdusa/7492309.html

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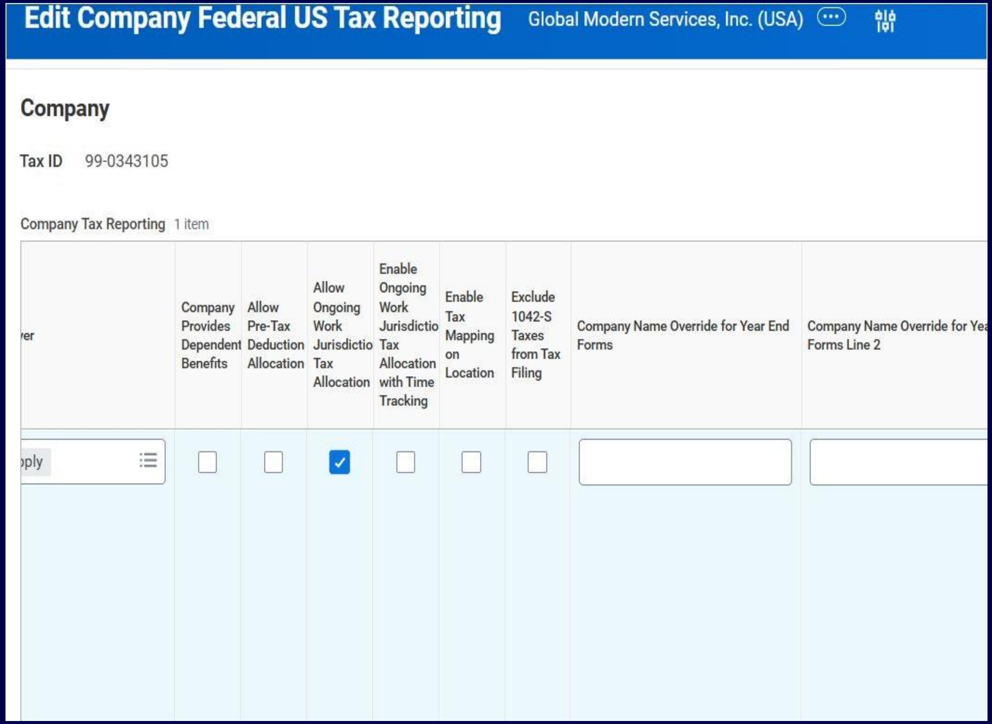
Setup required

Convenience of Employer Rule

Impact analysis

Before the release



After the release

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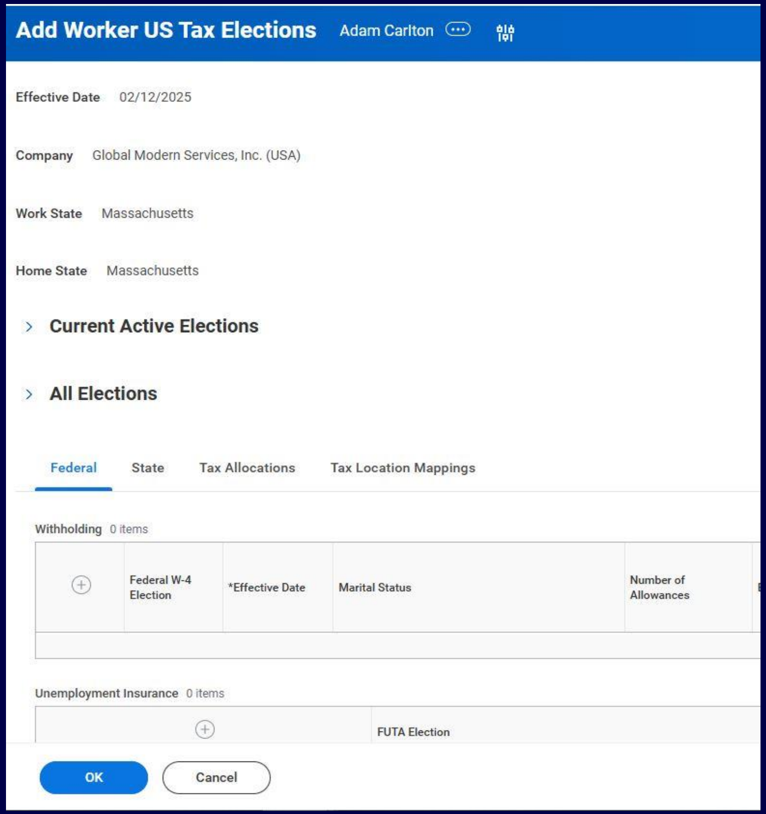
Setup required

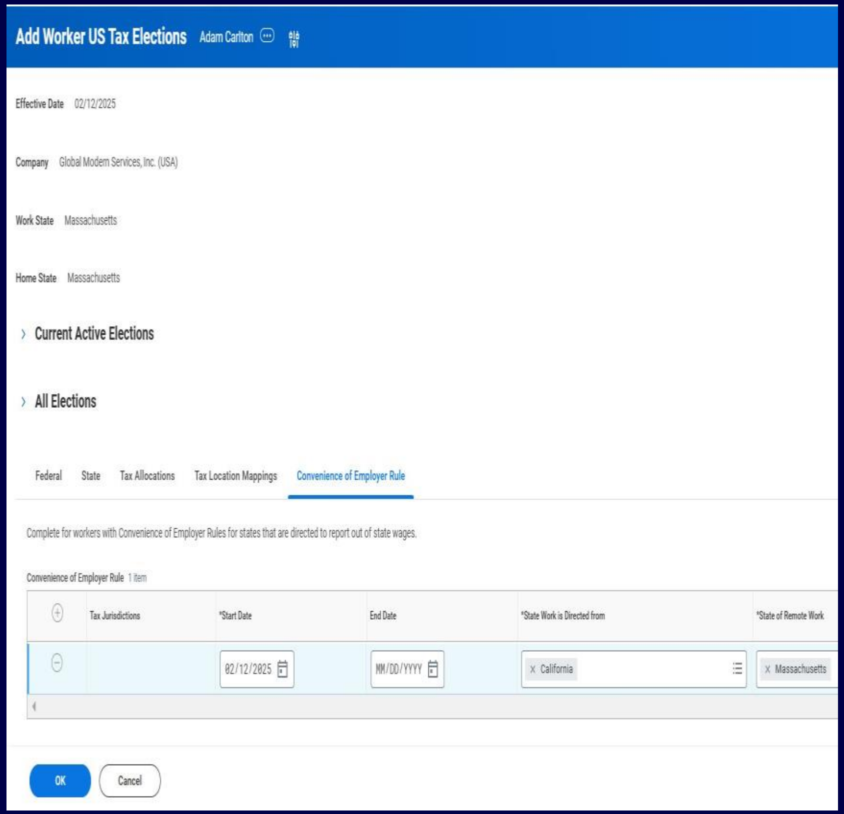
Convenience of Employer Rule

Impact analysis

Before the release



After the release



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Procurement

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Procurement features

Automatically available

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- Non-Catalog Request Improvements in Requisitions Worklet
- Display All Names for Requisitions Awaiting Action by Multiple Users in the Requisitions Worklet
- Add Reasons and Comments for Canceling or Closing Requisitions in the Requisitions Worklet
- Manually Close and Reopen Requisition Lines
- Purchase Item Security Domain for Catalog Search in the Requisitions Worklet

Setup required

- Bulk Import Submit Procurement Mass Close Web Service
- Intersection Security Group for Purchase Order Lines and Line Splits for Organization Report Data Source Filter
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- Lot and Serial for Consignment Requisitions and Purchase Orders

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Enhanced Security for Organization Reporting - Receipt/Receipt Adjustment

What’s changing

With this release, workday enables greater access to these report data sources for the Intersection security group:

- Receipt Line by Organization (Indexed)
- Return Line by Organization (Indexed)

Additional considerations

- Receipt Line by Organization (Indexed)

  Workday updates the Receipt Line by Organization data source filter to evaluate security for the Intersection security group.
  For Intersection security group users, Workday now only displays receipt lines that meet all dimensions of the security group on custom reports.

What do I need to do

N/A

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/smorder/8769257.html

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Enhanced Security for Organization Reporting - Receipt/Receipt Adjustment, cont.

Additional considerations

- Workday also replaces the Location report field on the Taggable business object (secured to the Public Reporting Items domain) with the new Location for Receipt Line Distribution report field on the Report Receipt Line Distribution business object (secured to the Public Reporting Items domain). You can use this new report field when creating custom reports on receipt lines.
- Return Line by Organization (Indexed)
  Workday updates the Return Line by Organization data source filter to evaluate security for the Intersection security group.
  For Intersection security group users, Workday now only displays return lines that meet all dimensions of the security group on custom reports.
- Organization
  Workday also update the Organization prompt on custom reports to display only relevant values to the respective security groups.

https://doc.workday.com/release-notes/en-us/smorder/8769257.html

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Automatically available

Enhanced Security for Organization Reporting - Receipt/Receipt Adjustment

Impact analysis

Before the release	After the release
N/A	After the release, Workday enable greater access to these report data sources for the Intersection security group: Receipt Line by Organization (Indexed) Return Line by Organization (Indexed)

Impact description
Greater access to the return lines and receipt lines data source enabled.

https://doc.workday.com/release-notes/en-us/smorder/8769257.html

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Automatically available

Enhanced Security for Organization Reporting - Receipt/Receipt Adjustment

Impact analysis

Before the release

N/A

After the release

		Data Source Filters			
	Category	Data Source Filter	Description	Built-in Prompts	Permitted Security Groups
ng	Procurement	Receipt Lines Filter		Company	Business Asset Accountant Business Asset Tracking Specialist Buyer Controller Finance Auditor More (5)
ng	Procurement	Return Lines Filter		Company	Business Asset Accountant Business Asset Tracking Specialist Buyer Controller Finance Auditor More (5)

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Personalized Search for Requisitions Worklet

What's changing

Workday enhances the catalog search in the Requisitions worklet to display personalized search results based on purchase history for similar requisitions, enabling you to find items for your requisitions more easily.

What do I need to do

Nothing. Search results in the Requisitions worklet will be automatically personalized based on purchase history.

Additional Considerations

Workday enhances the catalog search in the Requisitions worklet to display personalized search results based on purchase history and display these items higher in the list of search results.

What happens if I do nothing

If you do nothing, your search results in the Requisitions worklet will be automatically personalized based on purchase history.

https://doc.workday.com/release-notes/en-us/smorder/6554560.html

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Automatically available

Personalized Search for Requisitions Worklet, cont.

Additional Considerations

When you perform a search using the Search Catalog ordering method in the worklet, Workday now matches search results with data from successfully completed requisition lines in the past year that have a matching company, ship-to and deliver-to addresses, and at least 1 matching worktag.

https://doc.workday.com/release-notes/en-us/smorder/6554560.html

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Personalized Search for Requisitions Worklet

Impact analysis

Before the release	After the release
Before the release, there was no efficiency in Search Catalog.	After the release, enables you to find items more efficiently and easily when you perform a search using the Search Catalog ordering method in the worklet.

Impact description
The search results in the Requisitions worklet will be automatically personalized based on purchase history.

https://doc.workday.com/release-notes/en-us/smorder/6554560.html

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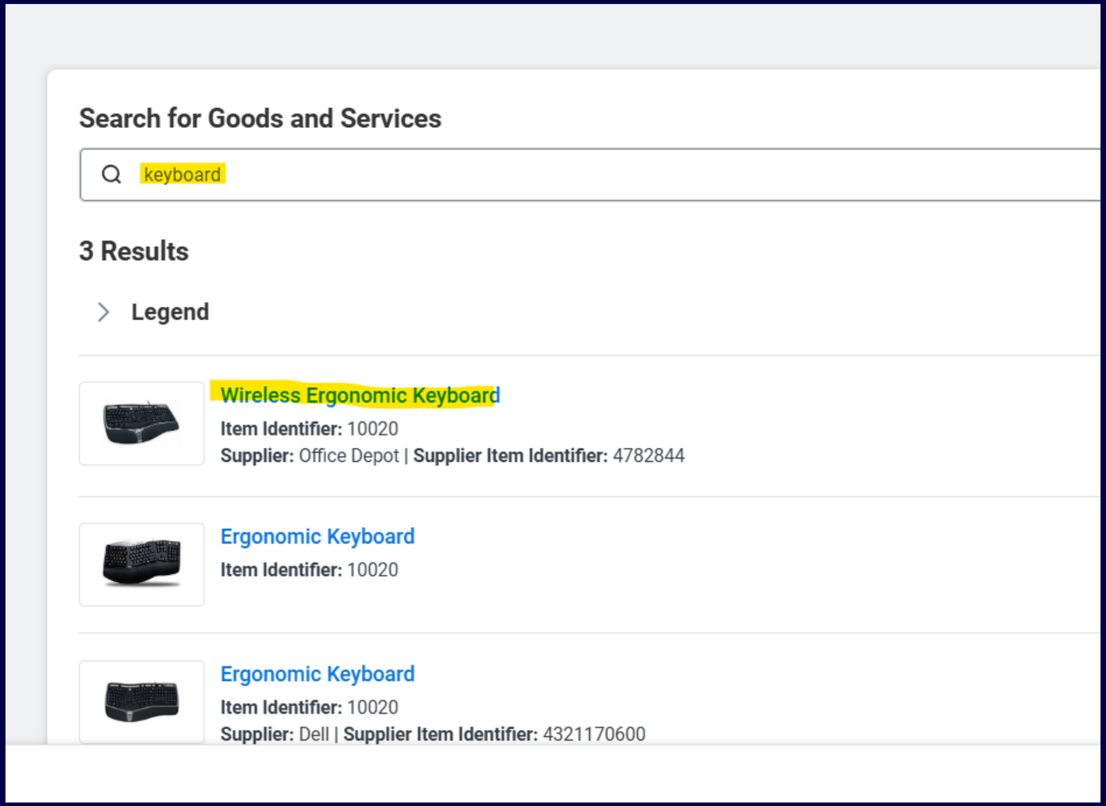
Personalized Search for Requisitions Worklet

Impact analysis

Before the release

N/A

After the release



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Enhanced Security for Organization Reporting - Internal Service Delivery

What's changing

With this release, workday enables greater access to the Internal Service Delivery Lines and Line Splits report data source for the Intersection security group.

Additional Considerations

- Workday updates the Internal Service Delivery Line Distributions by Organization data source filter to evaluate security for the Intersection security group.
- For Intersection security group users, Workday now only displays internal service delivery line distributions that meet all dimensions of the security group on custom reports.
- Workday also updates the Organization prompt on custom reports to display only relevant values to the respective security groups.

What do I need to do

N/A

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/smorder/8771255.html

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Automatically available

Enhanced Security for Organization Reporting - Internal Service Delivery

Impact analysis

Before the release	After the release
N/A	With this release, workday enables greater access to the Internal Service Delivery Lines and Line Splits report data source for the Intersection security group.

Impact description
Workday updates the Internal Service Delivery Line Distributions by Organization data source filter to evaluate security for the Intersection security group

https://doc.workday.com/release-notes/en-us/smorder/8771255.html

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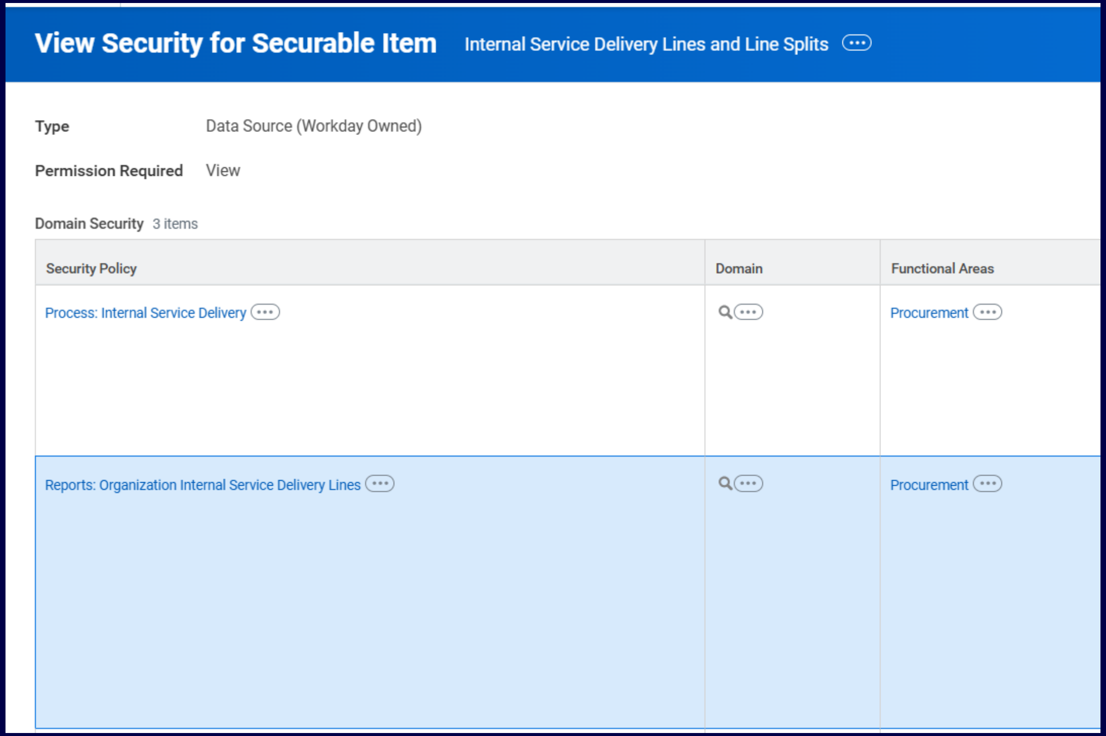
Enhanced Security for Organization Reporting - Internal Service Delivery

Impact analysis

Before the release

N/A

After the release



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Non-Catalog Request Improvements in Requisitions Worklet

What's changing

With this release, Workday deliver a redesigned user experience with consolidated sections for goods and services non-catalog requests in the Requisitions worklet.

Workday also enable you to configure your non-catalog requests to default to goods or services, and Workday can now suggest users to create catalog requests instead of non-catalog requests when appropriate.

What do I need to do

You don't need to do anything for these enhancements that are automatically available in the Requisitions worklet:

Redesigned goods and services non-catalog request pages.

Suggestions by Workday for users to create catalog requests instead of non-catalog requests, when appropriate.

By default, Workday doesn't select any option on the new Default Non-Catalog Request Line Type in Requisitions

https://doc.workday.com/release-notes/en-us/smreq/7635765.html

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Non-Catalog Request Improvements in Requisitions Worklet, cont.

Additional Considerations

Workday deliver a new Default Non-Catalog Request Line Type in Requisitions Worklet prompt on the Edit Company Procurement Options task, enabling you to select either goods or services as the default non-catalog request type for your buyers. Setting a default request type eliminates the need for your users to select a request type when they create a non-catalog request, making the request process more efficient. You can also select the option for no defaulting. By default, Workday doesn't select an option on the new Default Non-Catalog Request Line Type in Requisitions Worklet prompt and your non-catalog requests in the worklet remain defaulting to goods.

What happens if I do nothing

By default, Workday doesn't select any option on the new Default Non-Catalog Request Line Type in Requisitions Worklet prompt and your non-catalog requests in the worklet remain defaulting to goods.

These enhancements will be automatically available in the Requisitions worklet:

Redesigned goods and services non-catalog request pages.

Suggestions by Workday for users to create catalog requests instead of non-catalog requests, when appropriate

https://doc.workday.com/release-notes/en-us/smreq/7635765.html

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Non-Catalog Request Improvements in Requisitions Worklet, cont.

Additional considerations

Workday deliver a new Default Non-Catalog Request Line Type in Requisitions Worklet prompt on the Edit Company Procurement Options task, enabling you to select either goods or services as the default non-catalog request type for your buyers. Setting a default request type eliminates the need for your users to select a request type when they create a non-catalog request, making the request process more efficient. You can also select the option for no defaulting. By default, Workday doesn't select an option on the new Default Non-Catalog Request Line Type in Requisitions Worklet prompt and your non-catalog requests in the worklet remain defaulting to goods.

https://doc.workday.com/release-notes/en-us/smreq/7635765.html

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Automatically available

Non-Catalog Request Improvements in Requisitions Worklet, cont.

Additional considerations

Workday also deliver the new Line Nudged report field on the Requisition Line business object (secured to the Public Reporting Items domain) that you can use in custom reports to provide information about requisition lines created from suggestions to make a catalog request.

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https://doc.workday.com/release-notes/en-us/smreq/7635765.html

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Automatically available

Non-Catalog Request Improvements in Requisitions Worklet

Impact analysis

Before the release	After the release
N/A	After the release, this feature provides a more user-friendly experience for non-catalog requests in the requisition worklet, making your requests process more efficient and increasing your requisitioning compliance.

Impact description
Re-designed user-experience with consolidated sections for non-catalog requests in the requisition worklet.

https://doc.workday.com/release-notes/en-us/smreq/7635765.html

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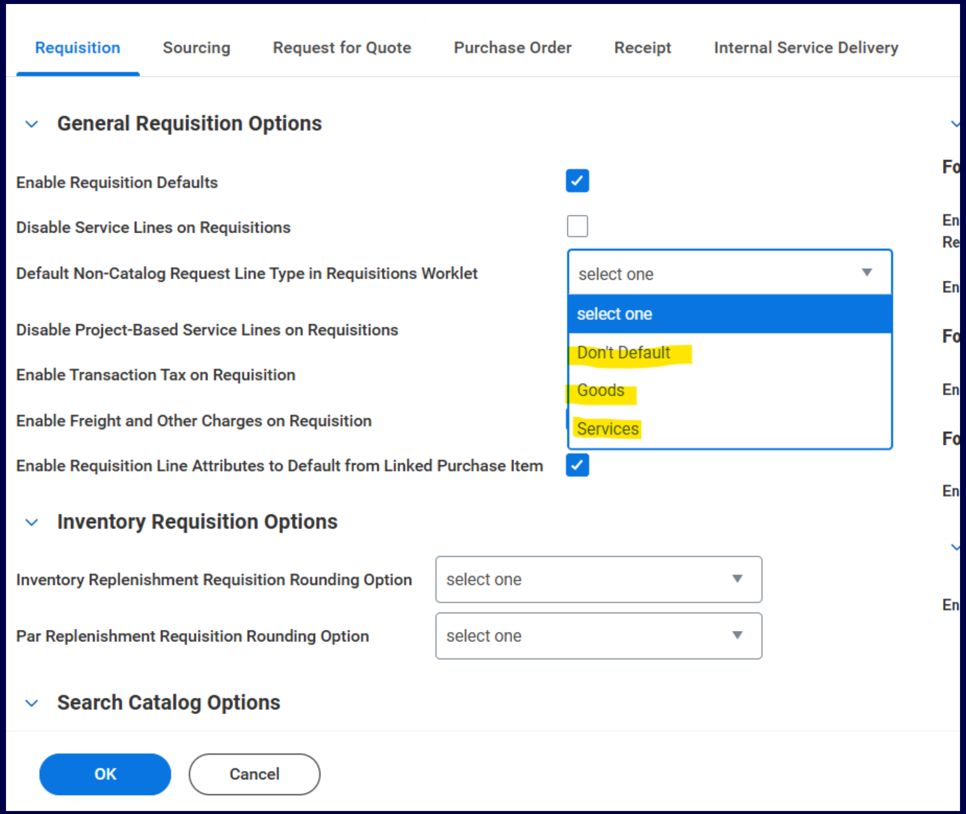
Non-Catalog Request Improvements in Requisitions Worklet

Impact analysis

Before the release

N/A

After the release



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Display All Names for Requisitions Awaiting Action by Multiple Users in the Requisitions Worklet

What's changing

Workday enables you to view the names of all users for requisitions awaiting action by more than one user.

Additional Considerations

- Workday adds an Awaiting Action - Show Details link on open requisitions awaiting action by multiple users in the Requisitions worklet. You can select Awaiting Action - Show Details to view the names of all users that can take action on requisitions that are awaiting action by multiple users.
- Workday also deliver a new Requisition Event Viewable by Processing Person report field (secured to the Public Reporting Items domain) on the Requisition business object that you can use on custom reports.

What do I need to do

This feature is automatically available and no configuration is needed.

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/smreq/8396503.html

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Automatically available

Display All Names for Requisitions Awaiting Action by Multiple Users in the Requisitions Worklet

Impact analysis

Before the release	After the release
Before the release, this enhancement did not exist.	After the release, Workday enables you to view the names of all users for requisitions awaiting action by more than one user.

Impact description
This feature is automatically available and no configuration is needed.

https://doc.workday.com/release-notes/en-us/smreq/8396503.html

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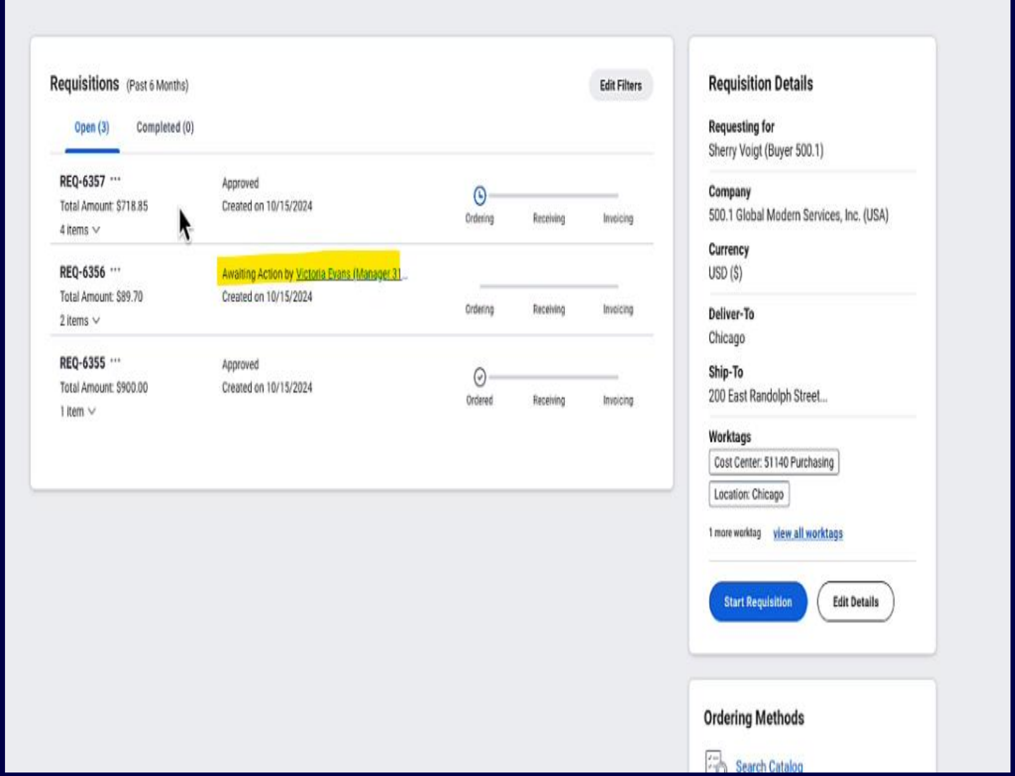
Automatically available

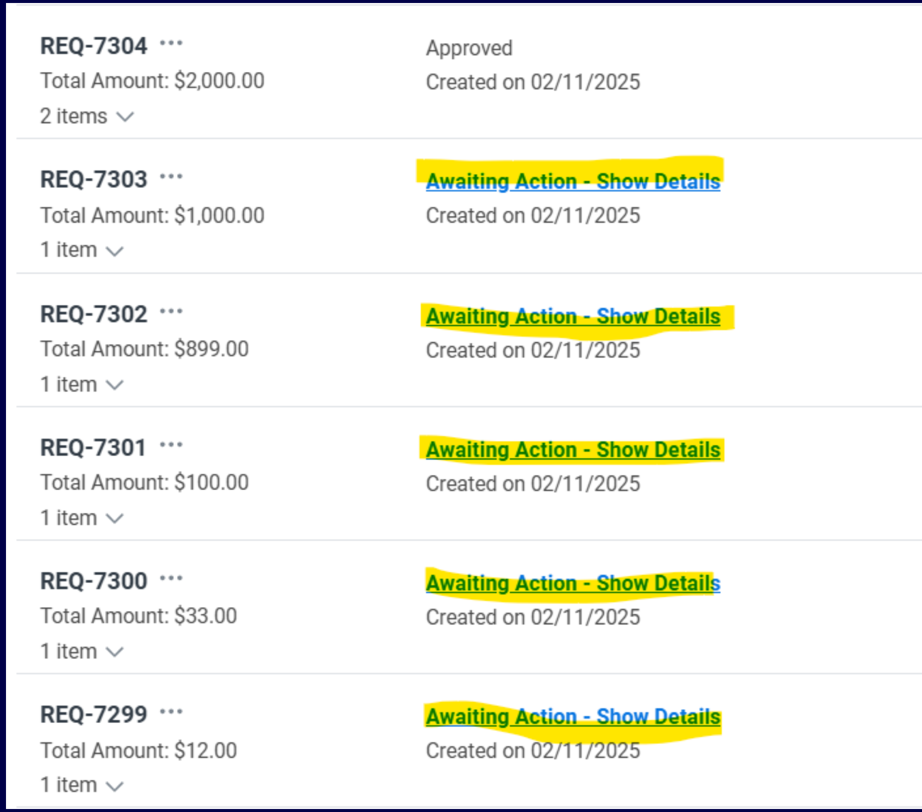
Display All Names for Requisitions Awaiting Action by Multiple Users in the Requisitions Worklet

Impact analysis

Before the release



After the release



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Add Reasons and Comments for Canceling or Closing Requisitions in the Requisitions Worklet

What’s changing

Workday enables you to now add reasons for canceling or closing requisitions in the Requisitions worklet. Workday also enable you to add an accounting date override when closing a requisition.

What do I need to do

(Optional) Use the Maintain Procurement Reasons task to configure reason codes for these requisition activities:

Requisition - Cancel

Requisition - Close

What happens if I do nothing

If you don't have reason codes configured:

- You won't be able to enter reasons when you cancel or close a requisition.
- You'll only be able to enter comments when you close or cancel a requisition.

https://doc.workday.com/release-notes/en-us/smreq/8432331.html

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Automatically available

Add Reasons and Comments for Canceling or Closing Requisitions in the Requisitions Worklet, cont.

Additional Considerations

- When you select Cancel from the related actions menu of a requisition in the Requisitions worklet, Workday now directs you to the Confirm Requisition Cancel page. You can use the Reason and Comments fields on the page to enter a reason code and any comments when canceling a requisition.
- When you select Close from the related actions menu of a requisition in the Requisitions worklet, Workday now directs you to the Close Requisition task. You can use the Reason and Comments field on the task to enter a reason code and any comments when closing a requisition. You can also use the Accounting Date Override field on the Close Requisition task if you have accounting enabled when you close a requisition.

https://doc.workday.com/release-notes/en-us/smreq/8432331.html

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Add Reasons and Comments for Canceling or Closing Requisitions in the Requisitions Worklet

Impact analysis

Before the release	After the release
Before the release, the reasons and comments for canceling or closing requisitions did not exist	After the release, fields for adding reasons and comments for canceling and closing requisitions exits

Impact description
Now able to add comments and reasons in the requisition worklet for canceling and closing

https://doc.workday.com/release-notes/en-us/smreq/8432331.html

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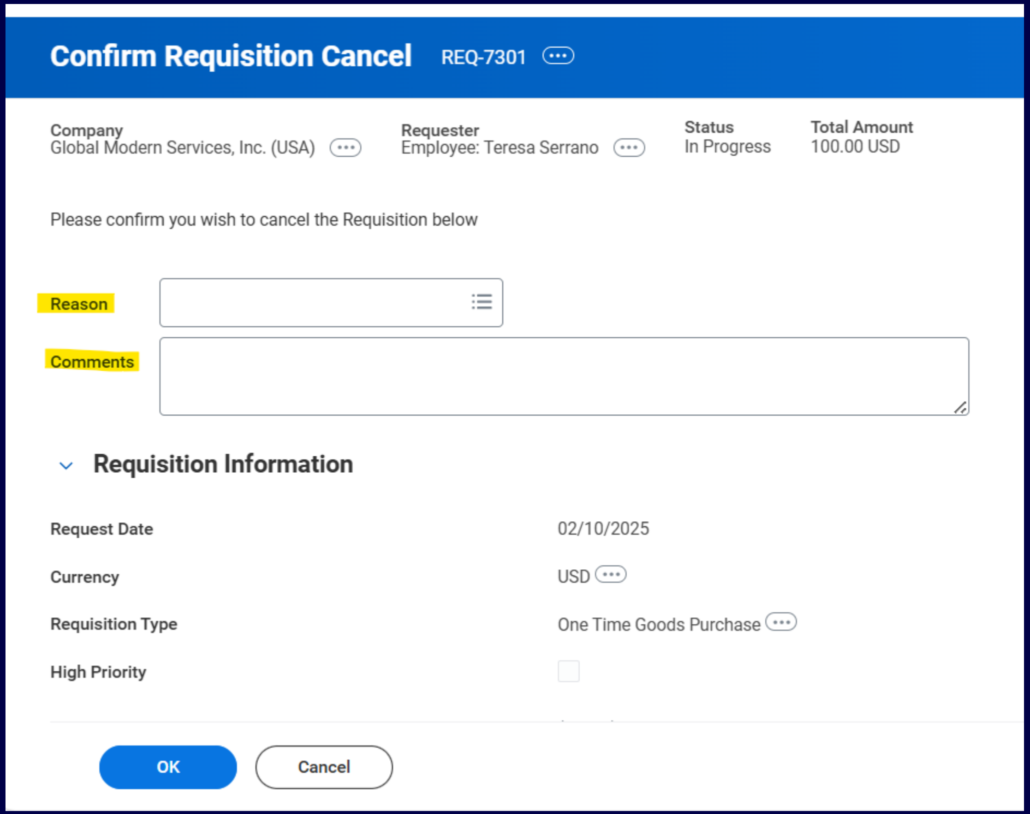
Add Reasons and Comments for Canceling or Closing Requisitions in the Requisitions Worklet

Impact analysis

Before the release

N/A

After the release



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Automatically available

Manually Close and Reopen Requisition Lines

What's changing

With this update, Workday enable you to close individual requisition lines while keeping the partially sourced requisition open. You can now also reopen closed lines manually.

What do I need to do

No configuration is needed to access this feature. You can use the Maintain Procurement Reasons task to optionally configure reason codes for closing requisitions.

https://doc.workday.com/release-notes/en-us/smreq/7614816.html

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Automatically available

Manually Close and Reopen Requisition Lines, cont.

Additional Considerations

- Workday delivers the new Close Lines and Reopen Lines related actions (secured to the Process: Requisition - Close domain) on the related actions menu for a requisition.
- Workday also rename these related actions on the related actions menu for a requisition in the Requisitions worklet:
- Cancel Requisition to Cancel
- Close Requisition to Close
- Workday deliver these new report fields on the Requisition Line business object that you can use in custom reports:
- Reopened By , Reopened Date

What happens if I do nothing

If you do nothing, users will still be able to close and reopen requisition lines.

https://doc.workday.com/release-notes/en-us/smreq/7614816.html

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Automatically available

Manually Close and Reopen Requisition Lines

Impact analysis

Before the release	After the release
Before the release, users were able to close requisitions at the header level.	After the release, Workday enables you to close individual requisition lines while keeping the partially sourced requisition open. You can now also reopen closed lines manually.

Impact description
Requisition lines can be closed and reopened manually.

https://doc.workday.com/release-notes/en-us/smreq/7614816.html

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Automatically available

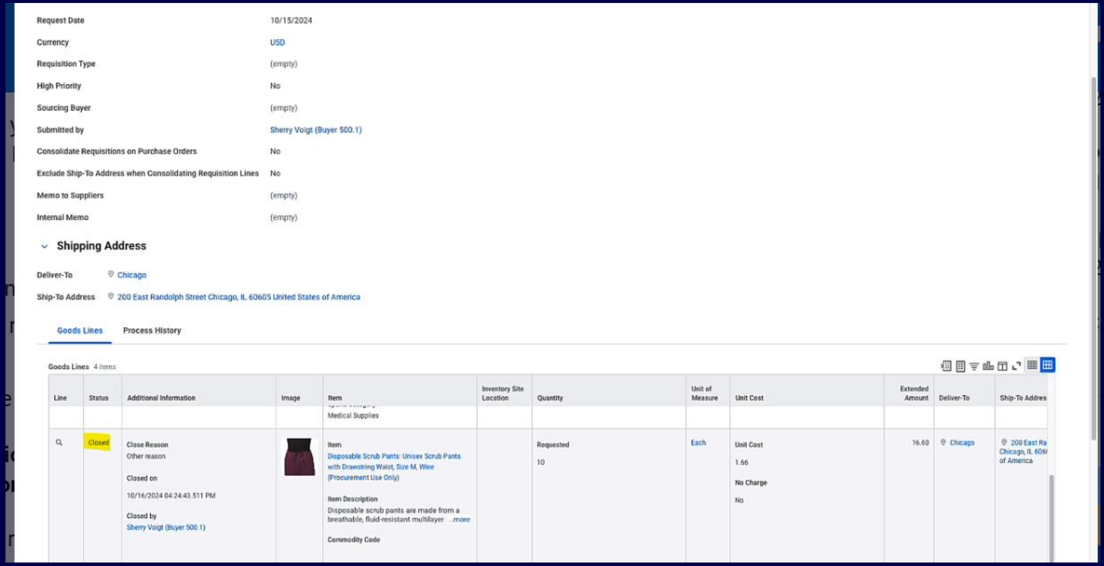
Manually Close and Reopen Requisition Lines

Impact analysis

Before the release

N/A

After the release



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Purchase Item Security Domain for Catalog Search in the Requisition Worklet

What's changing

Workday enhances the security for the catalog search in the Requisitions worklet.

What do I need to do

Nothing, this update is automatically available.

Additional Considerations

Workday enhances the security for the catalog search when you use the Search Catalog ordering method in the Requisitions worklet, enabling you to view catalog items when you have access to the View: Purchase Item security domain (secured to the Procurement functional area).

What happens if I do nothing

Users with access to the View: Purchase Item security domain will continue to be able to view catalog items in the Requisitions worklet when using the Search Catalog ordering method. If you don't have access to the View: Purchase Item security domain, you won't be able to view items in the catalog search.

https://doc.workday.com/release-notes/en-us/smreq/7636360.html

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Automatically available

Purchase Item Security Domain for Catalog Search in the Requisition Worklet

Impact analysis

Before the release	After the release
Before the release, this change does not exist	After the release, Workday enhances the security for the catalog search in the Requisitions worklet.

Impact description
This feature is automatically available and no configuration is needed.

https://doc.workday.com/release-notes/en-us/smreq/7636360.html

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Automatically available

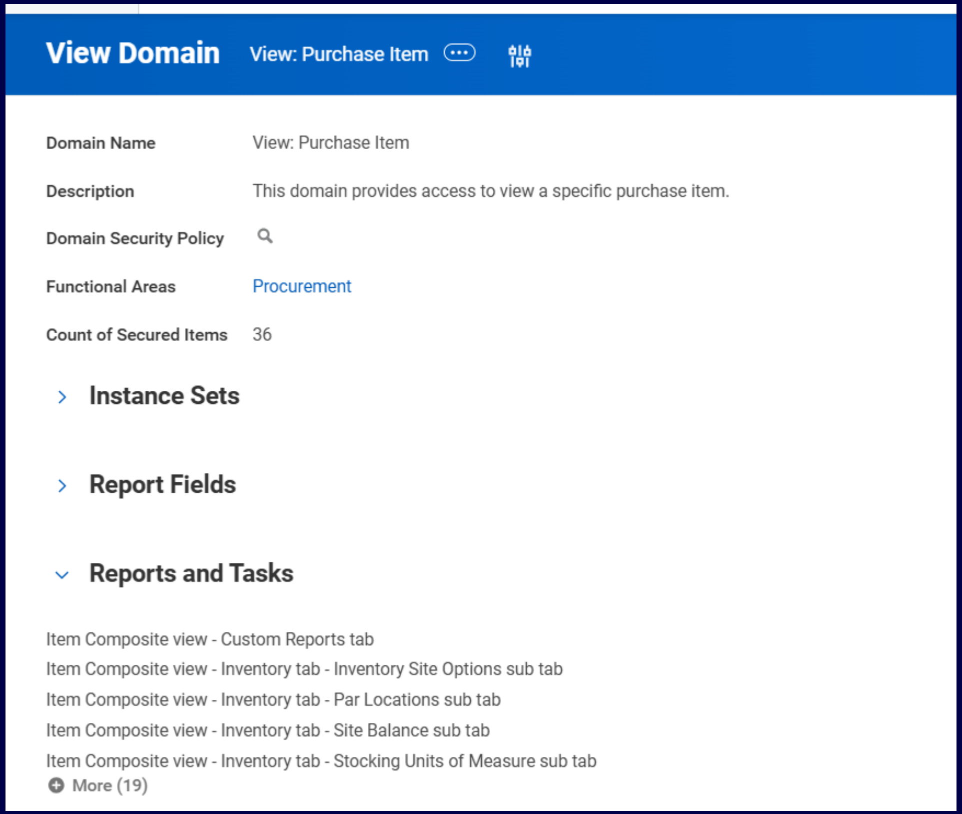
Purchase Item Security Domain for Catalog Search in the Requisition Worklet

Impact analysis

Before the release

N/A

After the release



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Setup required

Expand Multi-Supplier Functionality to Multi-Participant Contract Types

What's changing

With this release, Workday now enable you to select both multi-supplier and multi-participant options when configuring contract types.

What do I need to do

- Access the Maintain Supplier Contract Types task and add a Contract Type with both Multi-Supplier and Multi-Participant boxes checked.

Note: this contract type doesn't support adding contract lines.

- Access the Create Supplier Contract task and create a contract with the new contract type.
- Under Contract Participants, add the desired participants to the contract.
- Under Suppliers, select either Allow All Suppliers, or From Supplier List Only to specify certain suppliers.
- (Optional) Input a Markup Percent across all suppliers or by supplier.

https://doc.workday.com/release-notes/en-us/smcoco/8407347.html

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Expand Multi-Supplier Functionality to Multi-Participant Contract Types, cont.

Additional Considerations

Now, on these tasks and web services you can select both the Multi-Supplier and Multi-Participant options at the same time:

- Maintain Supplier Contract Types
- Get Supplier Contract Types
- Put Supplier Contract Type

When you enable both contract options you can now view and configure both the Contract Participant and Suppliers tabs on these tasks and web services:

- Change Supplier Contract
- Create Supplier Contract
- Create Supplier Contract Amendment

What do I need to do

Note: Workday reflects the markup percent on spend transactions, but not on the purchase item.

The following scenarios are not supported for Multi-Participant and Multi Supplier:

- Allow Retention
- Company-based pricing within Advanced Pricing
- Consignment
- Contract created using Requisition to Contract
- Contract created using RFQ Award flow
- Contract Lines

https://doc.workday.com/release-notes/en-us/smcoco/8407347.html

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Expand Multi-Supplier Functionality to Multi-Participant Contract Types, cont.

Additional Considerations

- Edit Supplier Contract
- Edit Supplier Contract Amendment
- Review Supplier Contract
- Revise Supplier Contract
- Get Supplier Contracts
- Get Supplier Contract Amendments
- Submit Supplier Contract
- Submit Supplier Contract Amendment

Workday now support any transactions that use these new contracts to comply with multi-supplier, multi-participant contracts.

What happens if I do nothing

There is no impact

https://doc.workday.com/release-notes/en-us/smcoco/8407347.html

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Setup required

Expand Multi-Supplier Functionality to Multi-Participant Contract Types

Impact analysis

Before the release	After the release
Before there was no multi-supplier and multi-participant options.	With this release, Workday now enable you to select both multi-supplier and multi-participant options when configuring contract types.

Impact description
Both multi-supplier and multi-participant options for configuring contract types available

https://doc.workday.com/release-notes/en-us/smcoco/8407347.html

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Setup required

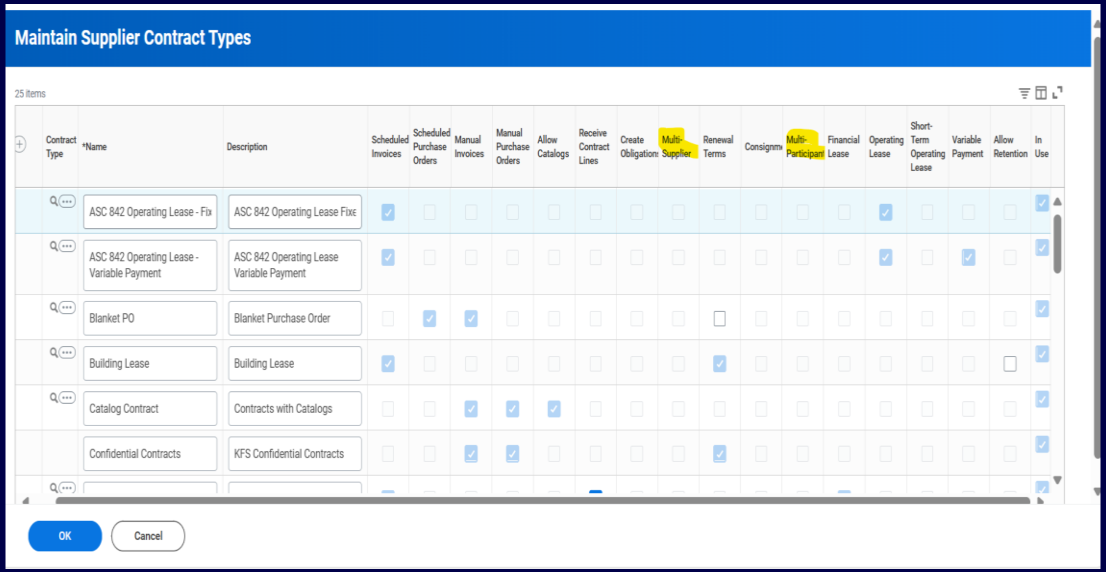
Expand Multi-Supplier Functionality to Multi-Participant Contract Types

Impact analysis

Before the release

N/A

After the release



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Manufacturer and Manufacturer Part Number as Primary Attributes for purchase items

What’s changing

With Workday 2025 R1, Workday deliver the ability to display an item's manufacturer and manufacturer part numbers as primary attributes on a purchase item's header information, instead of in it's alternate Item identifier information.

What do I need to do

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

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

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Manufacturer and Manufacturer Part Number as Primary Attributes for purchase items, cont.

Additional Considerations

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

- Manufacturer.
- Manufacturer Part #.

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

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

What happens if I do nothing

There is no impact.

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

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Manufacturer and Manufacturer Part Number as Primary Attributes for purchase items, cont.

Additional Considerations

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

- Manufacturer Part Number.
- Manufacturer.

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

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

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

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Setup required

Manufacturer and Manufacturer Part Number as Primary Attributes for purchase items

Impact analysis

Before the release	After the release
Before there was no Manufacturer and Manufacturer Part Number as Primary Attributes for purchase items	With Workday 2025 R1, Workday deliver the ability to display an item's manufacturer and manufacturer part numbers as primary attributes on a purchase item's header information, instead of in it's alternate Item identifier information.

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

https://doc.workday.com/release-notes/en-us/smcoco/8407347.html

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Setup required

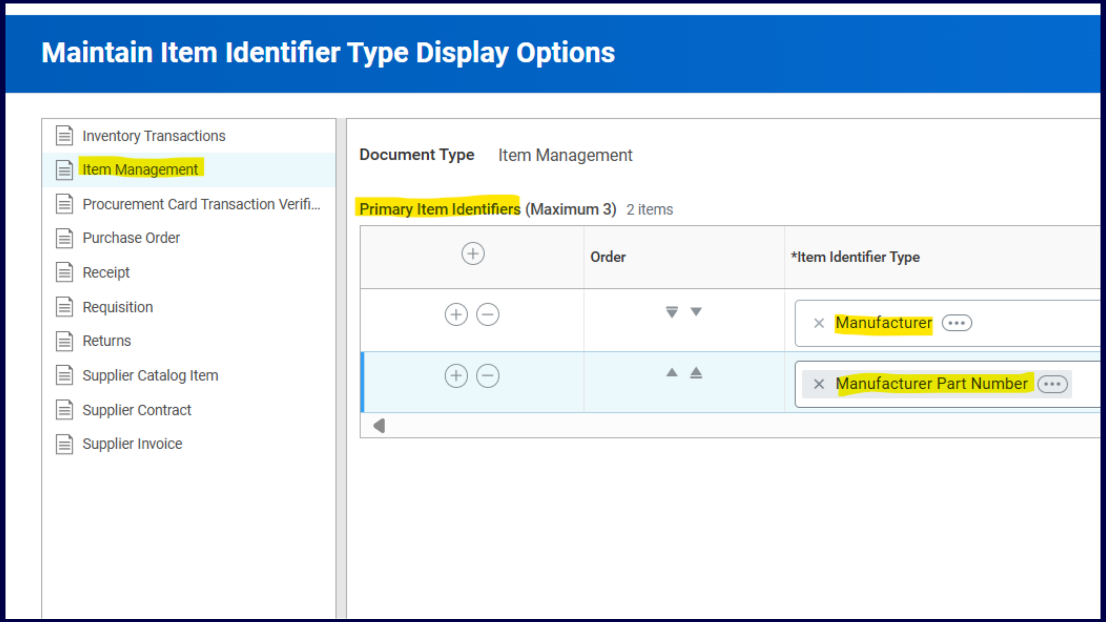
Manufacturer and Manufacturer Part Number as Primary Attributes for purchase items

Impact analysis

Before the release

N/A

After the release



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

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Intersection Security Group for Purchase Order Lines and Line Splits for Organization Report Data Source Filter

What's changing

The Purchase Order Lines and Line Splits for Organization report data source filter now correctly supports intersection security groups.

Additional Considerations

When you access the Find Purchase Order Lines and Line Splits for Organization report, the My Organization prompt now shows the organization values that are common to both security groups when the user belongs to an intersection security group.

What do I need to do

You must set up intersection security group to use this feature.

What happens if I do nothing

There is no impact.

https://doc.workday.com/release-notes/en-us/smorder/8635144.html

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Intersection Security Group for Purchase Order Lines and Line Splits for Organization Report Data Source Filter

Impact analysis

Before the release	After the release
N/A	The Purchase Order Lines and Line Splits for Organization report data source filter now correctly supports intersection security groups.

Impact description
You must set up intersection security group to use this feature.

https://doc.workday.com/release-notes/en-us/smorder/8635144.html

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Setup required

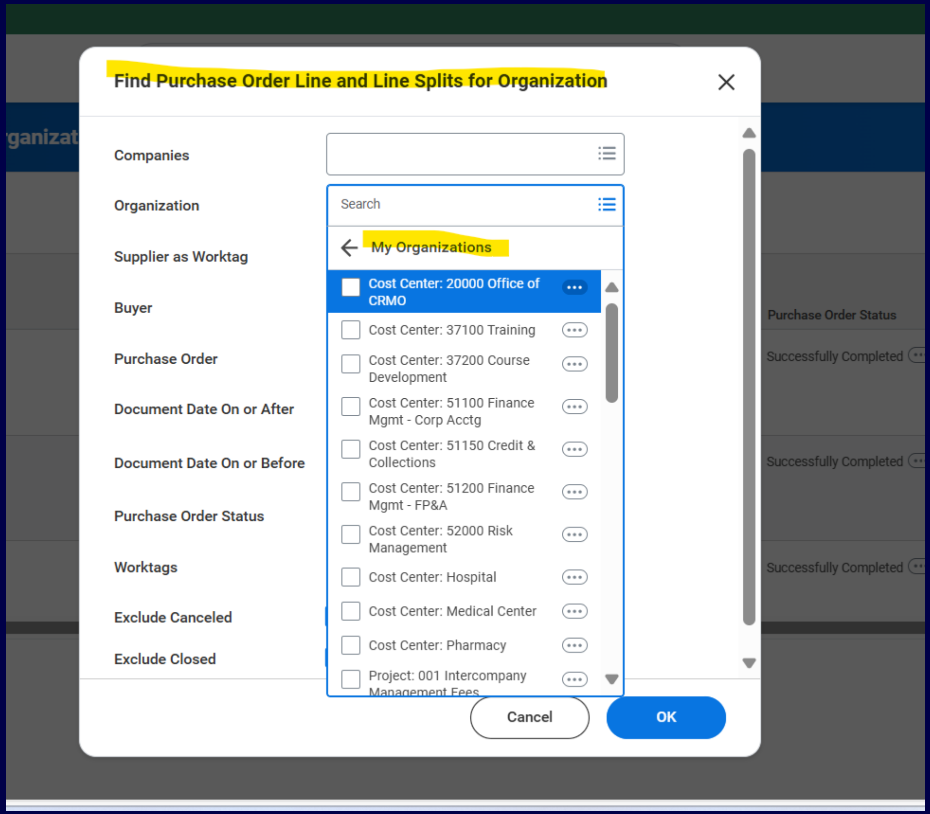
Intersection Security Group for Purchase Order Lines and Line Splits for Organization Report Data Source Filter

Impact analysis

Before the release

N/A

After the release



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Bulk Import Submit Procurement Mass Close Web Service

What's changing

Workday deliver a new Bulk Import Submit Procurement Mass Close web service.

What do I need to do

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

Additional Considerations

Workday deliver a new Bulk Import Submit Procurement Mass Close web service (secured to the Procurement Functional area) that you can use to process mass close procurement requests for a specific company or company hierarchy. You can only process one procurement document type at a time.

What happens if I do nothing

There is no impact.

https://doc.workday.com/release-notes/en-us/smorder/8623819.html

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Bulk Import Submit Procurement Mass Close Web Service

Impact analysis

Before the release	After the release
N/A	After the release, Workday delivers a new Bulk Import Submit Procurement Mass Close web service.

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

https://doc.workday.com/release-notes/en-us/smorder/8623819.html

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Setup required

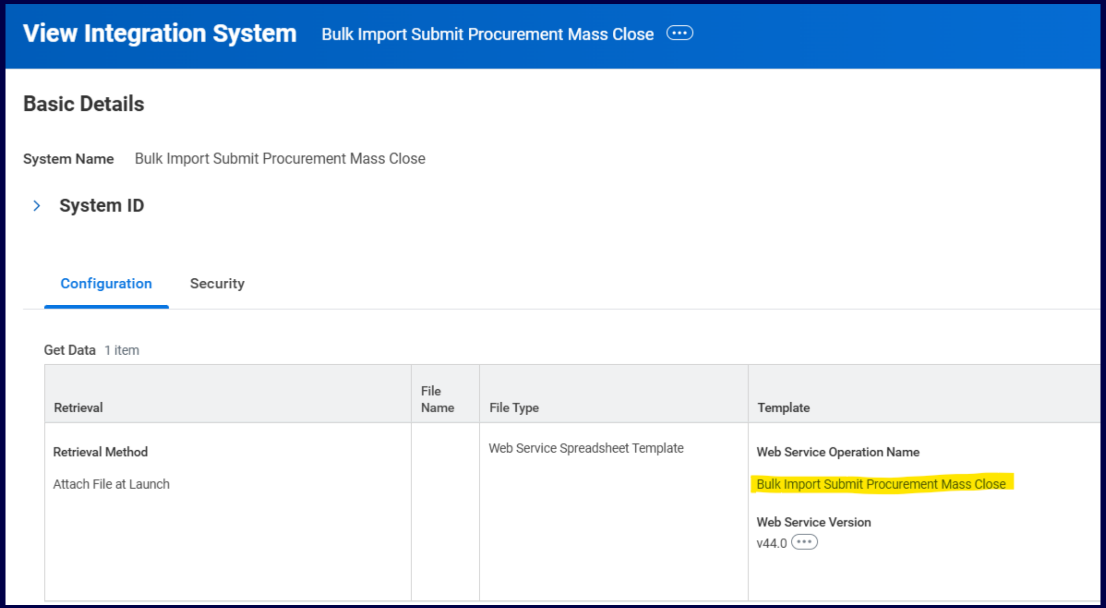
Bulk Import Submit Procurement Mass Close Web Service

Impact analysis

Before the release

N/A

After the release



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Lot and Serial for Consignment Requisitions and Purchase Orders

What's changing

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

What do I need to do

Create new requisition and purchase order types in the Maintain Requisition Types task and Maintain Purchase Order Types task to include the new lot and serial type for relevant consignment requisitions and purchase orders. This will allow you to use both new ad hoc lot and serial numbers on requisitions and purchase orders. You'll also continue to be able to use instance-based lot and serial added during put away.

The new lot and serial functionality for consignment requisitions and purchase orders isn't available in Preview for web services version 43.1. To test this functionality in Preview, use web services version 44.0 or later instead.

https://doc.workday.com/release-notes/en-us/smorder/8623819.html

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Lot and Serial for Consignment Requisitions and Purchase Orders, cont.

Additional Considerations

Tasks:
Workday add a new Lot and Serial option to the Maintain Requisition Types and Maintain Purchase Order Types tasks that you can select when creating requisition or purchase order types. By default, Workday also auto-selects the Lot and Serial option when you select the Bill Only option for a requisition or purchase order type.
You can deselect the Lot and Serial option to create a bill-only requisition or purchase order type without lot and serial.
Workday update these requisition tasks, enabling you to specify or edit lot and serial information on consignment requisitions:
Create Requisition
Edit Requisition Review and Revise

What happens if I do nothing

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

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

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Lot and Serial for Consignment Requisitions and Purchase Orders, cont.

Additional Considerations

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

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

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

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

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

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Lot and Serial for Consignment Requisitions and Purchase Orders, cont.

Additional Considerations

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

Reports:
Workday update the View Requisitions report to enable you to view ad hoc lot and serial information on consignment requisitions.
Workday also update these reports to display lot and serial information on your purchase orders and change orders.

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

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Lot and Serial for Consignment Requisitions and Purchase Orders

Impact analysis

Before the release	After the release
N/A	After the release, lot and serial consignment Requisitions and Purchase Orders

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

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

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Projects

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Report Field - Worker Is Assigned or Associated

What's changing

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

Additional considerations

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

What do I need to do

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

What happens if I do nothing

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

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

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Automatically available

Report Field - Worker Is Assigned or Associated

Impact analysis

Before the release	After the release
The report field called Worker is Assigned or Associated is not found.	Workday add a new report field called Worker is Assigned or Associated, that returns true or false depending on whether a worker is assigned or associated to any projects. You can add the field to custom reports.

Impact description
The reports with field “Worker Projects – Do Not Use” may not run in future as this field is going to get retired soon.

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

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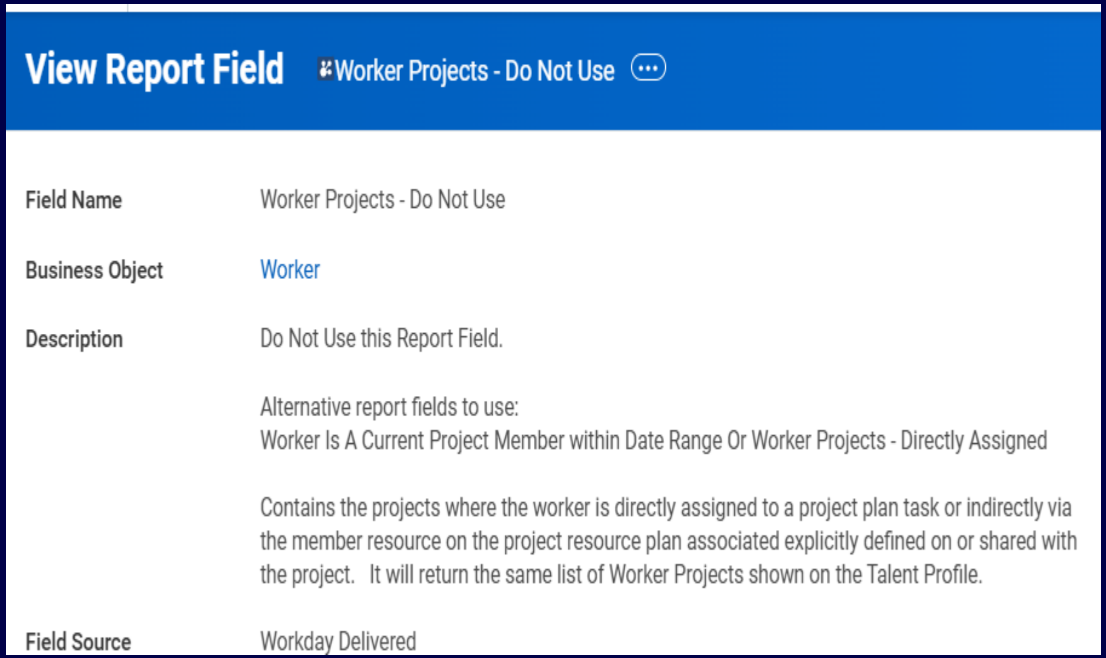
Report Field - Worker Is Assigned or Associated

Impact analysis

Before the release



After the release

Still the new True/False Field “Worker Is Assigned or Associated” is not found in the tenant.

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Project Budgets - Time and Expense for Phase and Task

What's Changing

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

Additional Considerations

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

What do I need to do

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

What happens if I do nothing

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

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

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Automatically available

Project Budgets - Time and Expense for Phase and Task

Impact analysis

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

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

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

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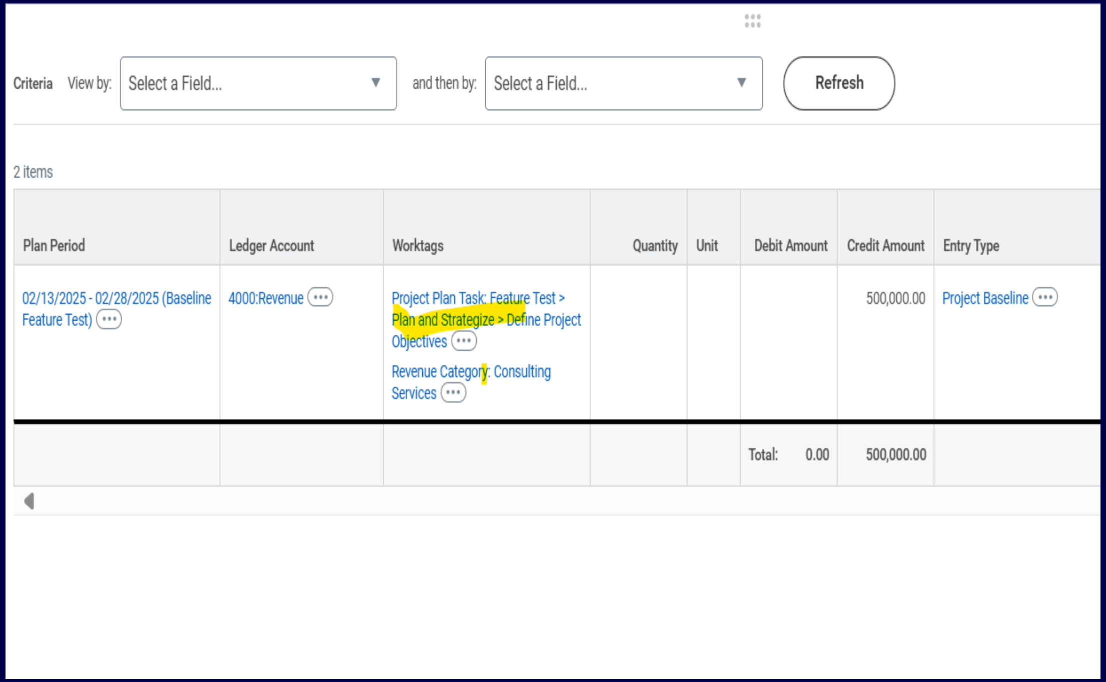
Project Budgets - Time and Expense for Phase and Task

Impact analysis

Before the release

N/A

After the release



Plan Period	Ledger Account	Worktags	Quantity	Unit	Debit Amount	Credit Amount	Entry Type
02/13/2025 - 02/28/2025 (Baseline Feature Test)	4000:Revenue	Project Plan Task: Feature Test > Plan and Strategize > Define Project Objectives Revenue Category: Consulting Services				500,000.00	Project Baseline
					Total: 0.00	500,000.00	

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Automatically Available

Enhance Schedule Project Budget Mass Update

What's Changing

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

Additional Considerations

- When you attempt to run the Schedule Project Budget Mass Update task while one of your project budgets is being updated, you will receive a validation message.
- Additionally, if a scheduled update fails due to a concurrent update, the scheduler receives an Inbox notification in Workday.

What do I need to do

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

What happens if I do nothing

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

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

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Automatically available

Enhance Schedule Project Budget Mass Update

Impact analysis

Before the release	After the release
Before the release, Schedule Project Budget Mass Update task was not ensuring the accuracy of the Project Budget	After the release, Schedule Project Budget mass update task ensures that the project budget remain accurate in Workday.

Impact description
No major impact and users can continue using the task Schedule Project Budget mass update.

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

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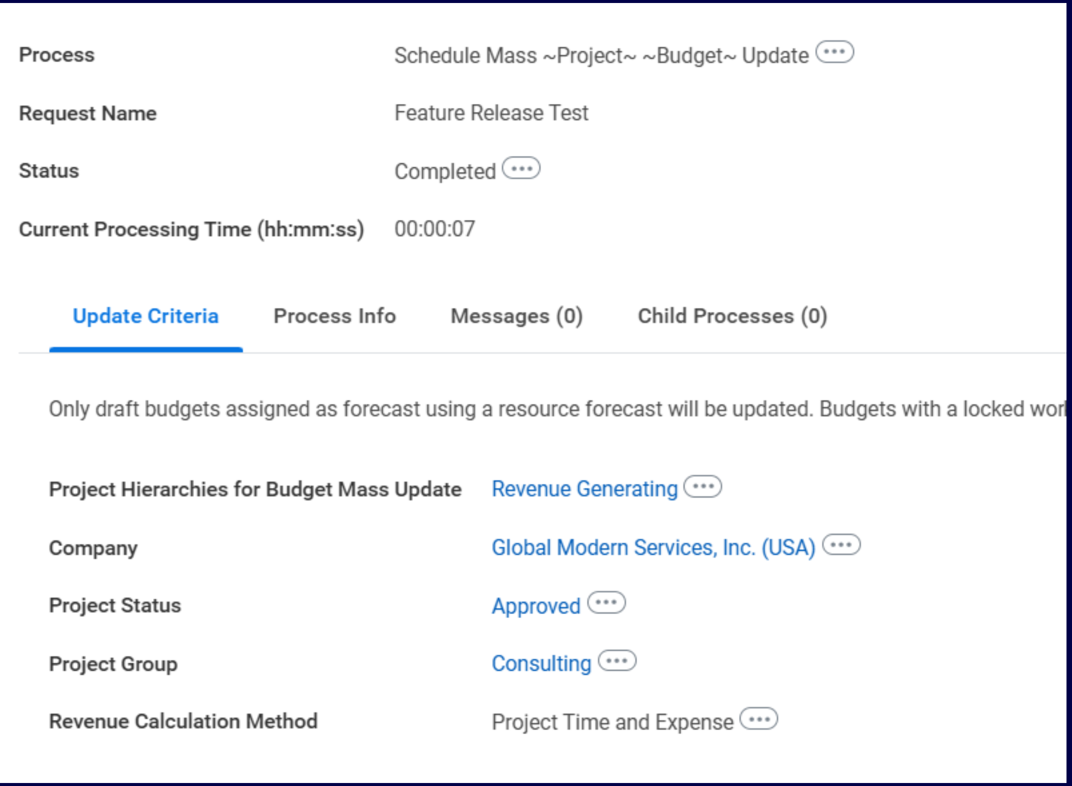
Enhance Schedule Project Budget Mass Update

Impact analysis

Before the release

N/A

After the release



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

What's changing

- Workday now extends this capability to fixed fee project contract lines when percent complete is calculated by cost.
- For this release, Workday supports phase and task granularity for percent complete configurations using these Estimated Cost Factor options:
  - Baseline
  - Forecast
  - Manual Input
- You can add project phases and tasks on fixed fee project customer contract lines, enabling you to enter amounts at a more granular level, bill, and recognize revenue for multiple stages of a project, eliminating the need to create multiple projects. This capability already exists for:
  - Project time and expense contract lines.
  - Value-based project contract lines.
  - Fixed fee project contract lines when percent complete is calculated by hours.

What do I need to do

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

What happens if I do nothing

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

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

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

Additional considerations

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

- Submit Revenue Schedule

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

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

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

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

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Automatically available

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

Impact analysis

Before the release	After the release
Before the release, this feature existed for Project time and expense contract lines, Value-based project contract line and for fixed fee project contract lines when percent complete is calculated by hours.	After the release, you can add project phases and tasks on Fixed Fee Contract line types enabling you to enter amounts at the more granular level, bill, recognize revenue for multiple stages of a project, eliminating the need to create multiple projects.

Impact description
Currently, the impact is for the percent complete calculation by cost for the fixed fee Project contract lines.

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

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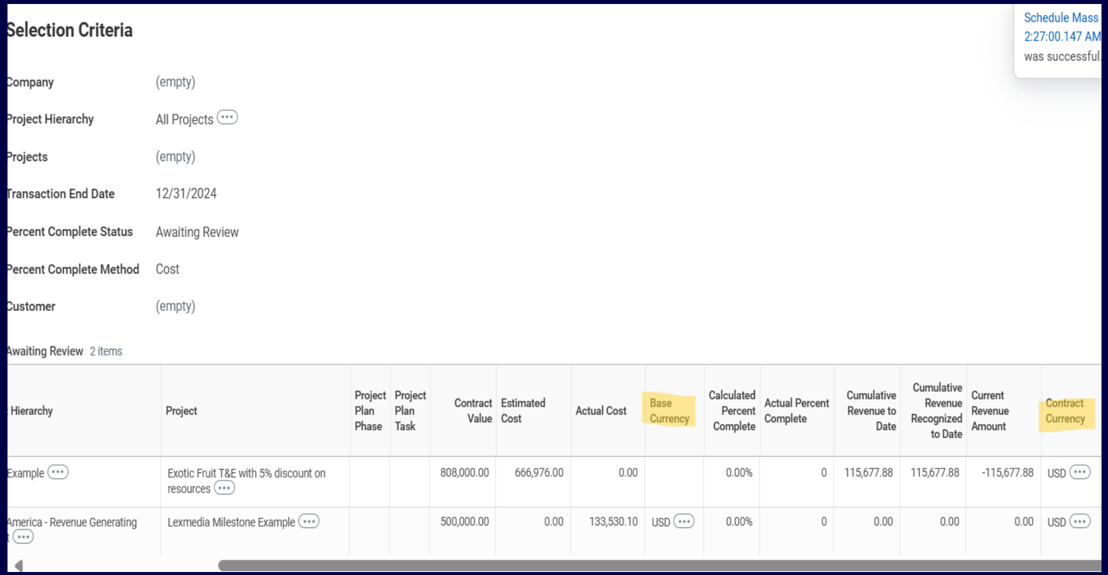
Project Phases and Tasks for Fixed Fee Customer Contract Lines, for Cost-Based % Complete

Impact analysis

Before the release

N/A

After the release



Schedule Mass
2:27:00.147 AM
was successful.

Selection Criteria

Company	(empty)
Project Hierarchy	All Projects
Projects	(empty)
Transaction End Date	12/31/2024
Percent Complete Status	Awaiting Review
Percent Complete Method	Cost
Customer	(empty)

Awaiting Review 2 items

Hierarchy	Project	Project Plan Phase	Project Plan Task	Contract Value	Estimated Cost	Actual Cost	Base Currency	Calculated Percent Complete	Actual Percent Complete	Cumulative Revenue to Date	Cumulative Revenue Recognized to Date	Current Revenue Amount	Contract Currency
Example	Exotic Fruit T&E with 5% discount on resources			808,000.00	666,976.00	0.00		0.00%	0	115,677.88	115,677.88	-115,677.88	USD
America - Revenue Generating	Lexmedia Milestone Example			500,000.00	0.00	133,530.10	USD	0.00%	0	0.00	0.00	0.00	USD

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Automatically Available

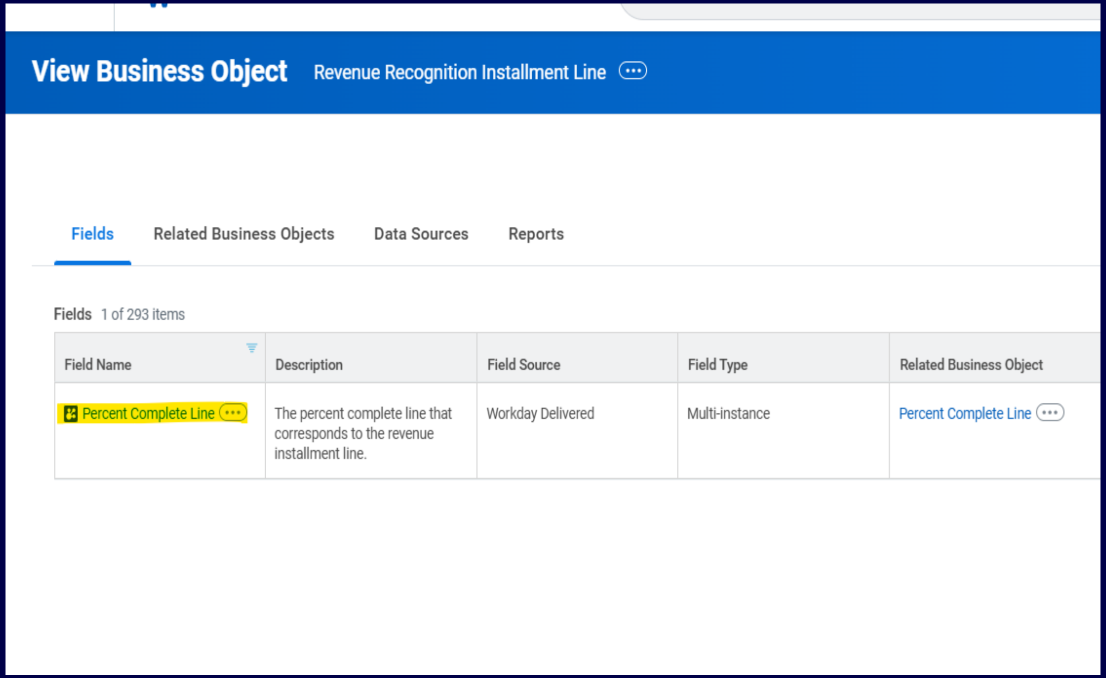
Project Phases and Tasks for Fixed Fee Customer Contract Lines, for Cost-Based % Complete

Impact Analysis

Before the release

N/A

After the release



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Task Level Forecasts on Resource Forecaster

What’s changing

Workday makes these enhancements to the Resource Forecaster: • When you add or edit a row, Workday include a new prompt for Project Plan Tasks. • Workday displays Project Plan Tasks in a new column labelled Task. • Workday enables you to sort and filter the Task column, and drill down on the tasks displayed. • Workday adds a new column labelled Action that enables you to edit or delete the selected row.

Additional considerations

N/A

What do I need to do

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

What happens if I do nothing

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

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

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Setup required

Task Level Forecasts on Resource Forecaster

Impact analysis

Before the release	After the release
No project Task column was available in the resource forecaster enabling to create and edit task level resource forecasts.	Workday enhance the Resource Forecaster by enabling you to create and edit task level resource forecasts. Workday add a new Task column to the grid which you can sort and filter to display Project Plan Tasks.

Impact description
Upon configuring the Profile Group: Resources for Project Composite View Profile, use the Resource Forecaster to create and edit detailed resource forecast reports at the project task level.

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

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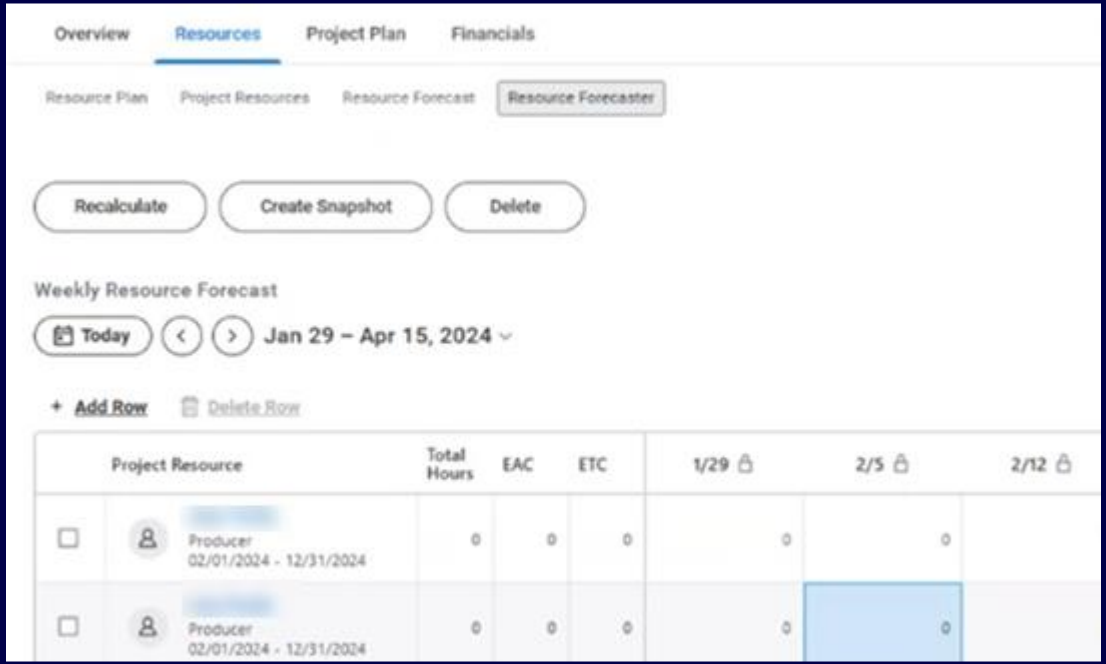
Setup required

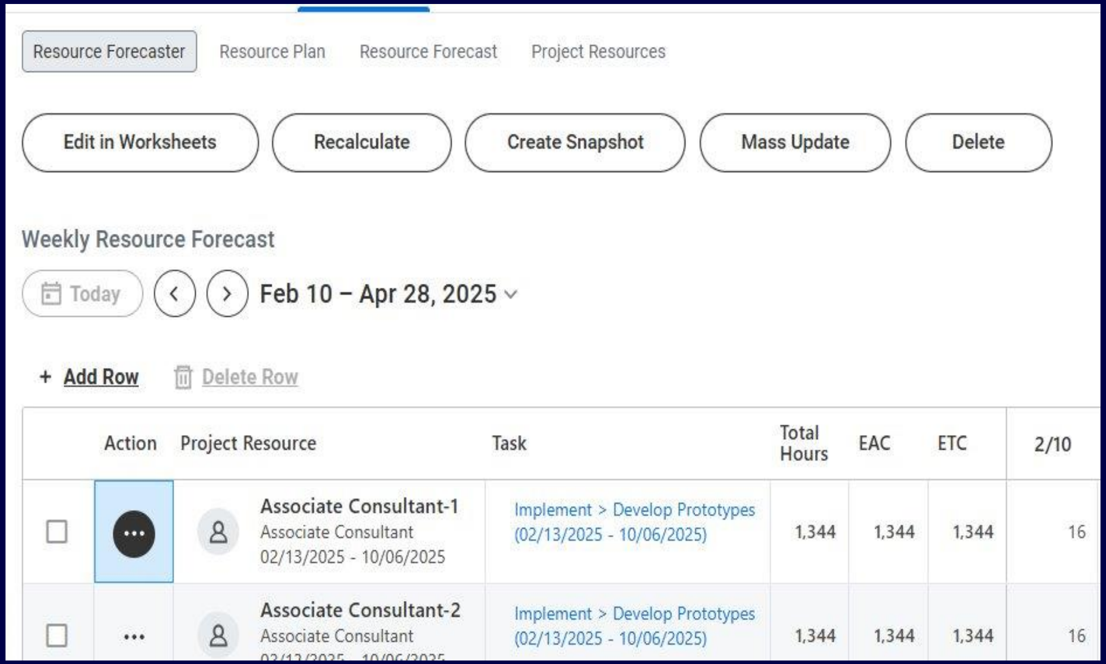
Task Level Forecasts on Resource Forecaster

Impact analysis

Before the release



After the release



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Multiple-Element Revenue Allocation SOAP Web Services

What's changing

With this release, Workday delivers multiple-element revenue allocation SOAP web services, enabling you to simultaneously create or update revenue allocations for customer contracts with multiple performance obligations across multiple contracts.

What do I need to do

Configure access to the new web services on the Process: Revenue - Allocations domain.

https://doc.workday.com/release-notes/en-us/finrev/8381012.html

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Multiple-Element Revenue Allocation SOAP Web Services, cont.

Additional Considerations

Workday deliver these new v44.0 web services (secured to the Process: Revenue - Allocations domain):

Get Multiple-Element Revenue Allocations

Put Multiple-Element Revenue Allocation

You can use the web services to make bulk updates for:

- Multiple-element revenue allocation inclusions or exclusions.
- Fair value fields.
- Revenue override amounts.

The web services include editable fields from the Create Multiple-Element Revenue Allocation task. The web services also include 2 non-editable fields for reference:

Currency Reference

Revenue Treatment Reference

What happens if I do nothing

If you choose not to use the web services, you won't notice any changes.

https://doc.workday.com/release-notes/en-us/finrev/8381012.html

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Multiple-Element Revenue Allocation SOAP Web Services, cont.

Additional Considerations

The existing validations from the Create Multiple-Element Revenue Allocation task also apply to the Put Multiple-Element Revenue Allocation web service. Workday also adds new validations to the Put Multiple-Element Revenue Allocation web service to prevent you from updating contracts with invalid field values for:

- Contract headers.
- Contract lines.
- Linked contracts.

When you use the Get Multiple-Element Revenue Allocations web service and the multiple-element revenue allocation is not executed on the contract, the web service retrieves values for the lower and upper percentage from the company revenue allocation configuration.

https://doc.workday.com/release-notes/en-us/finrev/8381012.html

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Multiple-Element Revenue Allocation SOAP Web Services, cont.

Additional Considerations

- When you use the Put Multiple-Element Revenue Allocation web service and no values or zeros are entered for the revenue override amount on the contract line level across all lines, Workday calculates the revenue allocations and persists as the revenue override amount.
- When you update the revenue override amount on the Put Multiple-Element Revenue Allocation web service, Workday doesn't calculate the revenue allocations.
- In the same way as the Create Multiple-Element Revenue Allocation task, the Put Multiple-Element Revenue Allocation web service can't update:
- Contract lines with the line type Fixed Amount - Billing Only.

https://doc.workday.com/release-notes/en-us/finrev/8381012.html

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Multiple-Element Revenue Allocation SOAP Web Services, cont.

Additional Considerations

- Contract lines with the line type Fixed Amount - Billing Only.
- Contract lines with revenue treatment set to Invoice.
- Contract lines that are excluded from calculation.
- The revenue override amount on fixed contract lines.
- The web services currently don't support the Summary tab from the Create Multiple-Element Revenue Allocation task for linked contracts.

See the SOAP API Change Log link under Related Information.

https://doc.workday.com/release-notes/en-us/finrev/8381012.html

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Multiple-Element Revenue Allocation SOAP Web Services

Impact analysis

Before the release	After the release
Before the release, there was no webservices in the domain process: Revenue – Allocation. Get Multiple-Element Revenue Allocations (Web Service) Put Multiple-Element Revenue Allocations (Web Service)	You can use the web services to make bulk updates for: • Multiple-element revenue allocation inclusions or exclusions. • Fair value fields. • Revenue override amounts.

Impact description
By configuring access to the new web services on the *Process: Revenue - Allocations* domain, Workday will be able to use these webservices or else not.

https://doc.workday.com/release-notes/en-us/finrev/8381012.html

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Setup required

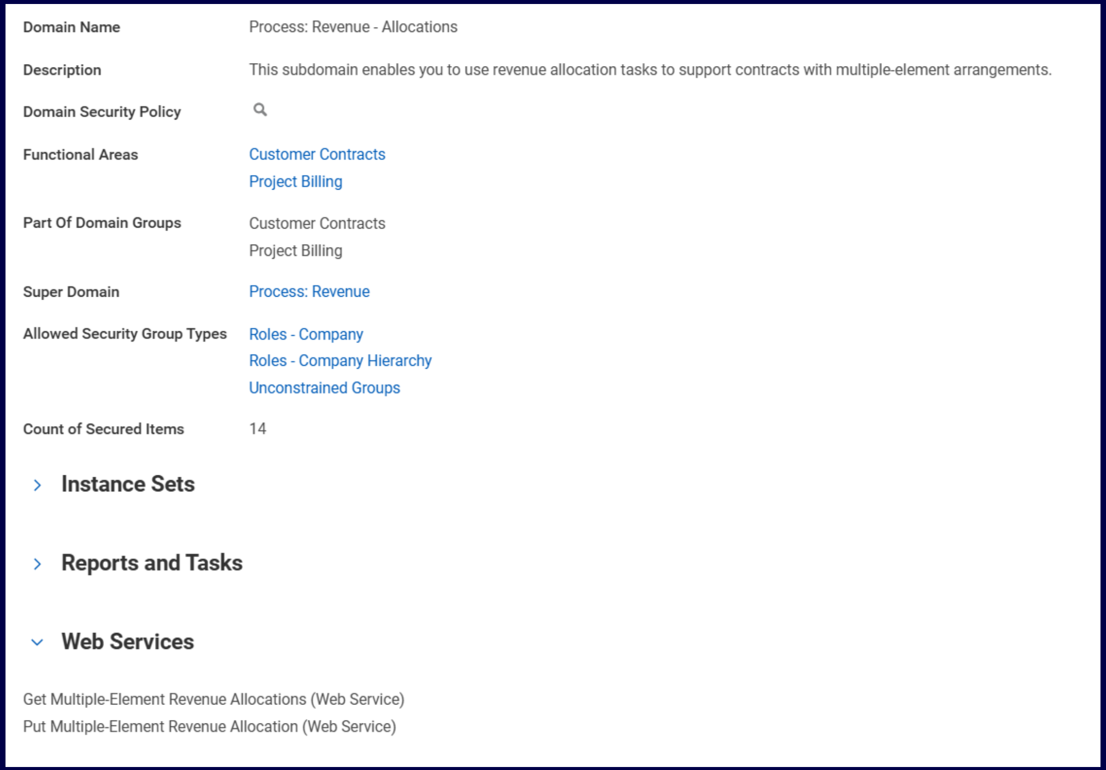
Multiple-Element Revenue Allocation SOAP Web Services

Impact analysis

Before the release

N/A

After the release



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Transfer Project Time Blocks within Closed Time Entry Periods

What's changing

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

This feature enables you to:

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

What do I need to do

Access the Set Up Project Billing Configuration task.

- On the Project Transfer Options tab, select the Allow Transfers Within Closed Time Entry Periods check box.
- Identify time blocks that need to be moved to another project in a closed period.
- Transfer the identified time blocks to another project through these supported tasks: Transfer Project Transactions or Manage Project Billing Transactions.

Additional Considerations

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

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

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Transfer Project Time Blocks within Closed Time Entry Periods, cont.

Additional Considerations

- Allow Project Transfer in Closed Periods Option
- Workday add a new, tenant-wide Allow Transfers Within Closed Time Entry Periods check box on the Project Transfer Options tab on the Set Up Project Billing Configuration task.
- When you select the option and have access to the Transfer Project Transactions task (secured to the Manage: Project Transaction Transfer subdomain under the parent Manage: Project domain), you can transfer time block transactions with dates that are in a closed time period to another project task.
- Time Blocks
- Workday add a new Project Transferred in Closed Period field

What do I need to do

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

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

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

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

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

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Transfer Project Time Blocks within Closed Time Entry Periods, cont.

Additional Considerations

On the time block, enabling you to easily identify if the project time block is transferred during a closed time entry period. When it is, the field displays with a Yes value. Otherwise, the field isn't displayed.

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

Reporting

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

What happens if I do nothing

If you choose to do nothing, you won't be able to transfer time blocks within closed time entry periods. You'll see no change to project time blocks transferred in open time entry periods.

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

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Transfer Project Time Blocks within Closed Time Entry Periods, cont.

Additional Considerations

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

Retroactive Payroll

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

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

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Transfer Project Time Blocks within Closed Time Entry Periods

Impact analysis

Before the release	After the release
Before the release, Workday were unable to transfer project time blocks to a closed time entry period.	After the release, enables to transfer time blocks within closed time entry periods without triggering retroactive payroll calculations or resulting in time calculations to run.

Impact description
Able to transfer time blocks within closed time entry periods and there is no change to project time blocks transferred in open time entry periods.

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

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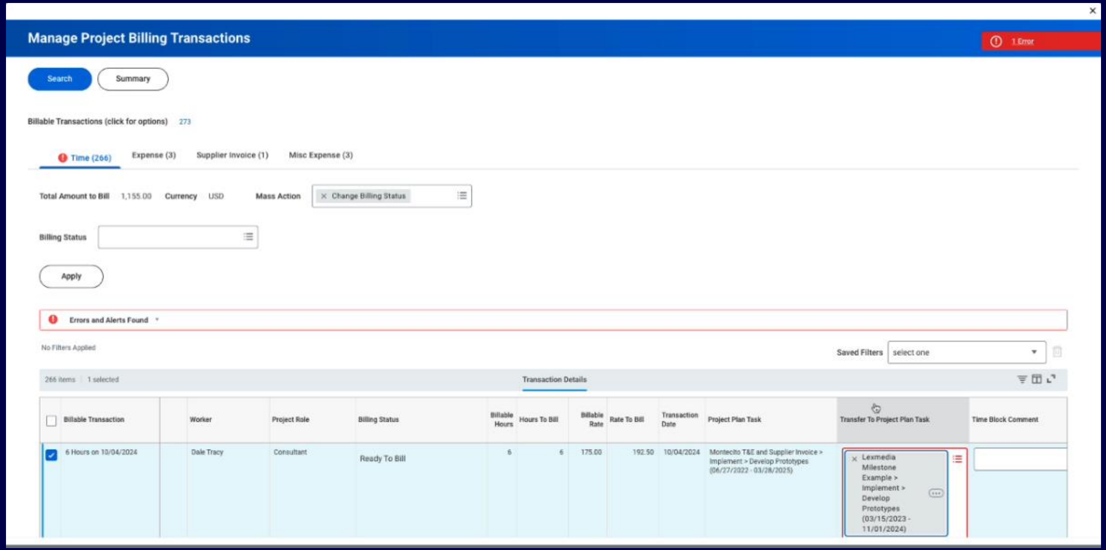
Setup required

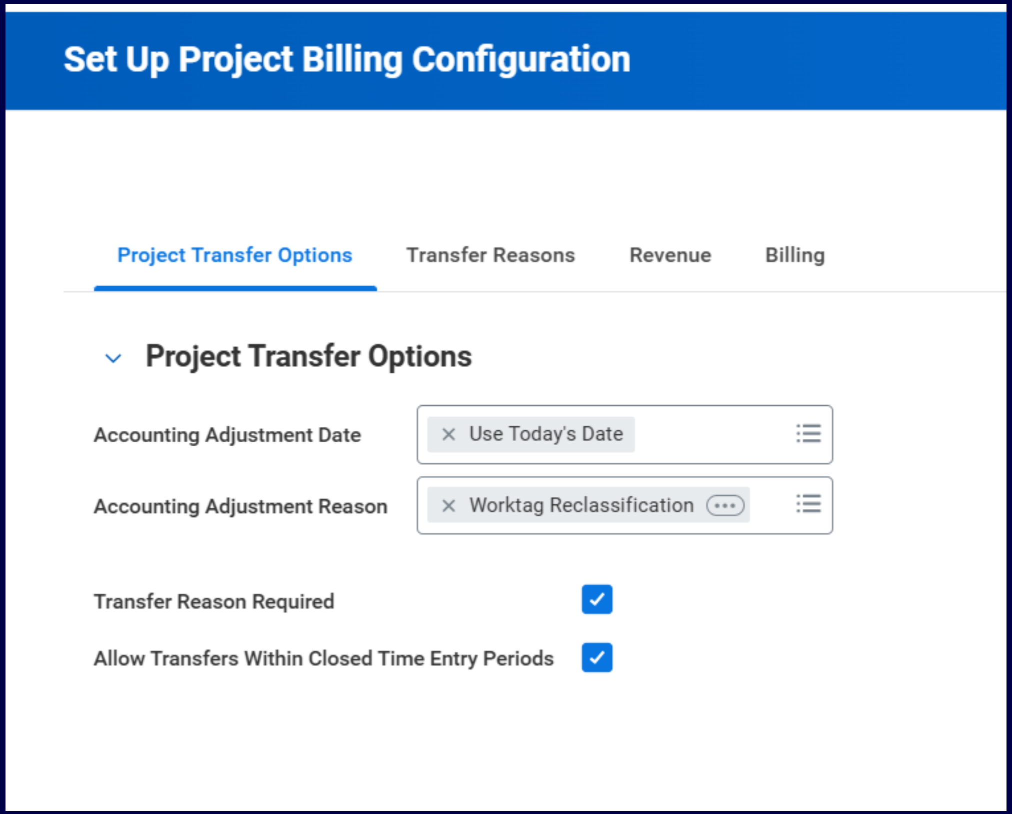
Transfer Project Time Blocks within Closed Time Entry Periods

Impact analysis

Before the release



After the release



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

What's changing

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

What do I need to do

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

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

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

Additional Considerations

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

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

Web Services

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

What happens if I do nothing

Your customer contract lines will include the Commodity Code field.

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

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

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

Additional Considerations

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

Reporting

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

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

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

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

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

Additional Considerations

Workday deliver these new report fields on the Customer Contract Line business object (secured to the Public Reporting Items domain) that you can use in custom reports:

- Commodity Codes (The commodity codes for the customer contract line)
- Company Ship-From Address (The ship-from location on the customer contract line)

https://doc.workday.com/release-notes/en-us/finrev/8380721.html

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Setup required

Add Bill-From and Ship-From Addresses and Commodity Code to Contract Billing

Impact analysis

Before the release	After the release
Before the release, there was no Bill-From and Ship-From Addresses field on customer invoice header.	After the release, Workday have the option to enable Bill-From and Ship-From Addresses on the customer invoices after making a check box available on Edit Customer Accounts Options at the Company level.

Impact description
The customer contract lines will be able to include the field on commodity code, Bill-From and Ship-From Adresses.

https://doc.workday.com/release-notes/en-us/finrev/8380721.html

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Purpose Financial Attachments

What's changing

With this release, Workday enables you to purge attachments on multiple financial entities.

What do I need to do

1. Create a privacy purge custom report on the relevant report data source.
2. Access the Purge Person Data task and select the custom report.

Additional considerations

You can now use the Purge Person Data task to purge many different Financial attachments and their details.

What happens if I do nothing

You’ll see no changes in Workday.

https://doc.workday.com/release-notes/en-us/finprj/8779368.html

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Purge Financial Attachments

Impact analysis

Before the release	After the release
Before the release, you cannot use the Purge Person Data task to purge many different Financial attachments and their details.	You can now use the Purge Person Data task to purge many different Financial attachments and their details.

Impact description
Purging attachments helps you meet privacy and document retention requirements.

https://doc.workday.com/release-notes/en-us/finprj/8779368.html

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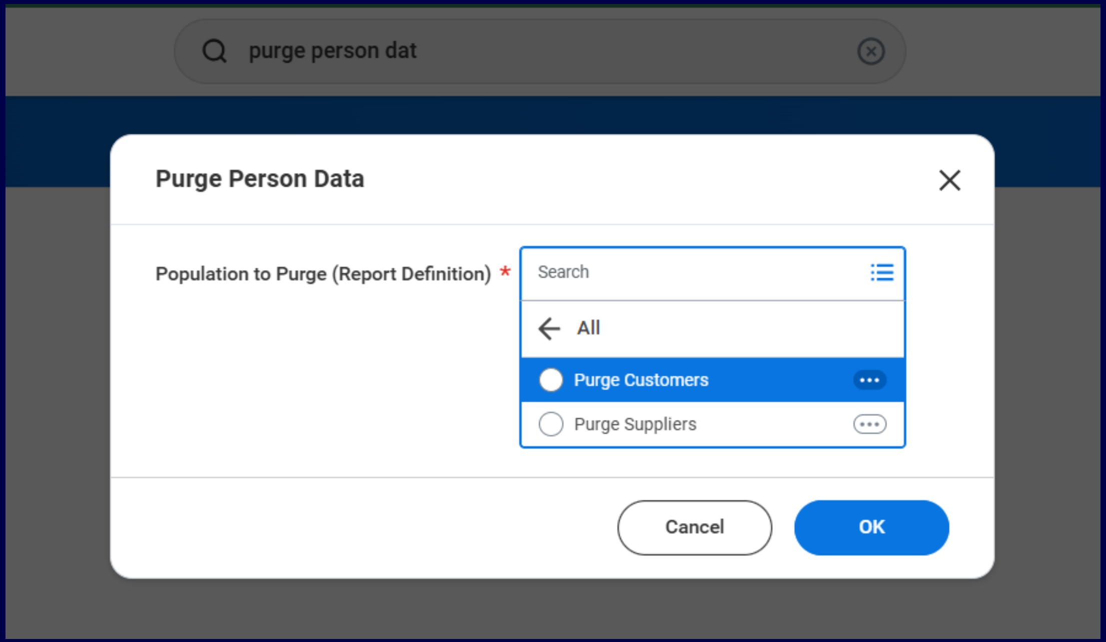
Purge Financial Attachments

Impact analysis

Before the release

N/A

After the release



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Create Quote from Spreadsheet in Services CPQ

What's changing

With this release, when you use the new Services CPQ functionality, Workday enable you to copy data from an external spreadsheet or Excel file and paste it in the quote grid to create a quote.

What do I need to do

Access the Maintain Services CPQ Settings task.

Select the Allow Paste from Spreadsheets into Quote flag.

Set up the spreadsheet.

The 1st row in each of the tables that you copy must be the table token for table identification, and the 2nd row must be a header row with the column names.

A token is a label that you add in the row on top of the table. Services table will have <SERVICES> token and roles will have <ROLES> token

For nested tables, start with the service table first. Then you can nest the entire roles table set under each service line. The last row of each Roles table must have a <LINES END> token to signify the end of the data.

https://doc.workday.com/release-notes/en-us/fincpq/8753905.html

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Create Quote from Spreadsheet in Services CPQ, cont.

Additional Considerations

Workday deliver a Allow Paste from Spreadsheets into Quote checkbox in the Maintain Services CPQ Settings task that you can select to enable the functionality.
After enabling the flag, you can copy and paste:
Only the roles under for any services.
Only the service or multiple services.
Both roles and services at the same time, as long as the role is under a service with an effort estimation of High Level.
You can paste a maximum of 500 role rows and 500 service rows each. Pasting the data will honor the

What do I need to do

For large data sets, when you want to delete all existing data in your quote grid and paste new data from your spreadsheet, then add a <REPLACE ALL> token on the very top row above the table from where your data set begins.

Ensure to match your column names to the Workday predefined column names. This match is case-sensitive. When the names don’t match the provided template, then Workday ignore that column data in the paste process.

See the example spreadsheet template for all required fields and optional fields.

Note: When there are duplicate column names, Workday paste the data from the last column with the same name.

https://doc.workday.com/release-notes/en-us/fincpq/8753905.html

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Create Quote from Spreadsheet in Services CPQ, cont.

Additional Considerations

calculations and cross-sheet references within your spreadsheet tabs, but will not be able to capture reference between different spreadsheets. The new data you add in the quote, appears below the existing data and doesn't override the data.

Note: This functionality only works in the Timeline and Summary view. When you are in the Work Breakdown view, you won't be able to copy data and paste into the quote.

To provide flexibility, this feature allows you to paste in the unit list price and the unit cost for roles.

What do I need to do

Workday do not support blank rows in between multiple Services, or Roles tables in the spreadsheet. When there is a blank row between 2 services, Workday ignores all data after the blank row.

When you encounter any errors, the entire paste process doesn't execute. You will need to first fix the errors, and then try pasting the entire data set again.

Access the desired spreadsheet, highlight the relevant data, and press CTRL/CMD+C.

Access the desired quote, from the related actions menu, click Edit Quote.

To paste services or multiple tables, select the Quote name cell and press CTRL/CMD+V in the quote grid.

https://doc.workday.com/release-notes/en-us/fincpq/8753905.html

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Create Quote from Spreadsheet in Services CPQ, cont.

What happens if I do nothing

No impact. You won't be able to paste data from external spreadsheets.

https://doc.workday.com/release-notes/en-us/fincpq/8753905.html

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Setup required

Create Quote from Spreadsheet in Services CPQ

Impact analysis

Before the release	After the release
Before the release, this feature does not exist	With this release, when you use the new Services CPQ functionality, Workday enable you to copy data from an external spreadsheet or Excel file and paste it in the quote grid to create a quote.

Impact description
Use the new Services CPQ functionality, enabling you to copy data from an external spreadsheet or Excel file and paste it in the quote grid to create a quote.

https://doc.workday.com/release-notes/en-us/fincpq/8753905.html

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Setup required

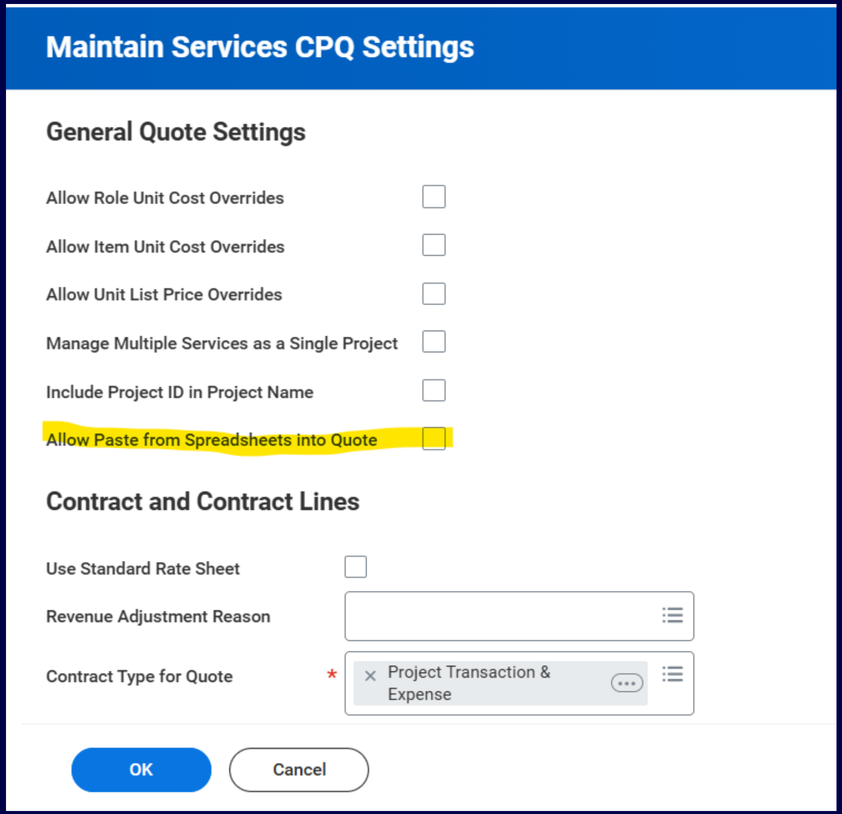
Create Quote from Spreadsheet in Services CPQ

Impact analysis

Before the release

N/A

After the release



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Work Breakdown Structure in CPQ

What's changing

With this release, Workday deliver a Work Breakdown Structure (WBS) in the new Services CPQ functionality that enables you to add phases and tasks to a service in the quote so that you can estimate your effort as:

High Level (a duration-based only service with no WBS)

With Phases

With Phases and Tasks

What do I need to do

When you create a quote using the Create Quote task, to add a phase or task based service select Add Custom Service option from the related actions menu under the Action column for the desired quote row.

On the Add Custom Service page, select With Phases or With Phases and Tasks option under Effort Estimation.

When you edit an existing quote:

To add a new phase or task based service, follow Steps 1 and 2.

To edit an existing phase or task based service, click Work Breakdown to edit role allocations.

Note: Once you configure an effort estimation for the service and allocate the hours in the service, you can’t change the Effort Estimation type.

https://doc.workday.com/release-notes/en-us/fincpq/8753908.html

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Work Breakdown Structure in CPQ, cont.

Additional Considerations

Workday deliver a Work Breakdown option on the dimension bar on these tasks:

- Create Quote.
- Edit Quote.
- View Quote.

This tab is greyed out for quotes that only have High Level services. By default, Workday display the quote grid in the Timeline view.

When you click on Work Breakdown, Workday display:

A Service prompt that enables you to select a specific service in the quote.

A Total Hours column that has 0 values when there are no roles in a service.

What happens if I do nothing

Nothing. You won't be able to use the WBS functionality to include phases and tasks in a quote.

https://doc.workday.com/release-notes/en-us/fincpq/8753908.html

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Work Breakdown Structure in CPQ, cont.

Additional Considerations

Columns for the roles you add to the service. For example, Consultant, IT Analyst.

In this WBS view, you can:

Click on the related actions menu under the Actions column for a Quote line to add services.

Click on the related actions menu under the Actions column for a Service line to add phases and roles.

Click on the related actions menu under the Actions column for a Phase line to add tasks and roles when it’s a With Phases and Tasks service.

Add hours for the roles in the respective role column.

View the allocations by Price, Cost, and FTE. You can’t edit them.

https://doc.workday.com/release-notes/en-us/fincpq/8753908.html

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Work Breakdown Structure in CPQ, cont.

Additional Considerations

In this WBS view, you can't:

Edit or Delete roles.

View a duration based service.

View or allocate non-labor items.

Workday deliver a Show Phases and Tasks toggle on the Timeline view of the quote when there's at least 1 service with phases or phases and tasks. You can slide the toggle to view the phases and tasks details, providing better insight into how the WBS elements are aligned by time.

In the Timeline view, you can:

- Add hours for roles that have already been allocated to phases or tasks for that time-period on the WBS view.

https://doc.workday.com/release-notes/en-us/fincpq/8753908.html

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Work Breakdown Structure in CPQ, cont.

Additional Considerations

- Note: If a role has been allocated to more than 1 phase or task for a given time-period, Workday splits the hours evenly across the overlapping phases or tasks.
- Edit and delete roles. You can’t do it in the WBS view.

In Timeline view, you can’t:

- Add phases or tasks. You must navigate to the WBS view to perform these actions.
- Add hours for the labor unless it is already allocated through the WBS page for the given time-period.

https://doc.workday.com/release-notes/en-us/fincpq/8753908.html

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Setup required

Work Breakdown Structure in CPQ

Impact analysis

Before the release	After the release
Before the release, you cannot use this feature	With this release, Workday deliver a Work Breakdown Structure (WBS) in the new Services CPQ functionality that enables you to add phases and tasks to a service in the quote so that you can estimate your effort

Impact description
Workday deliver a Work Breakdown Structure (WBS) in the new Services CPQ functionality that enables you to add phases and tasks to a service in the quote so that you can estimate your effort

https://doc.workday.com/release-notes/en-us/fincpq/8753908.html

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Setup required

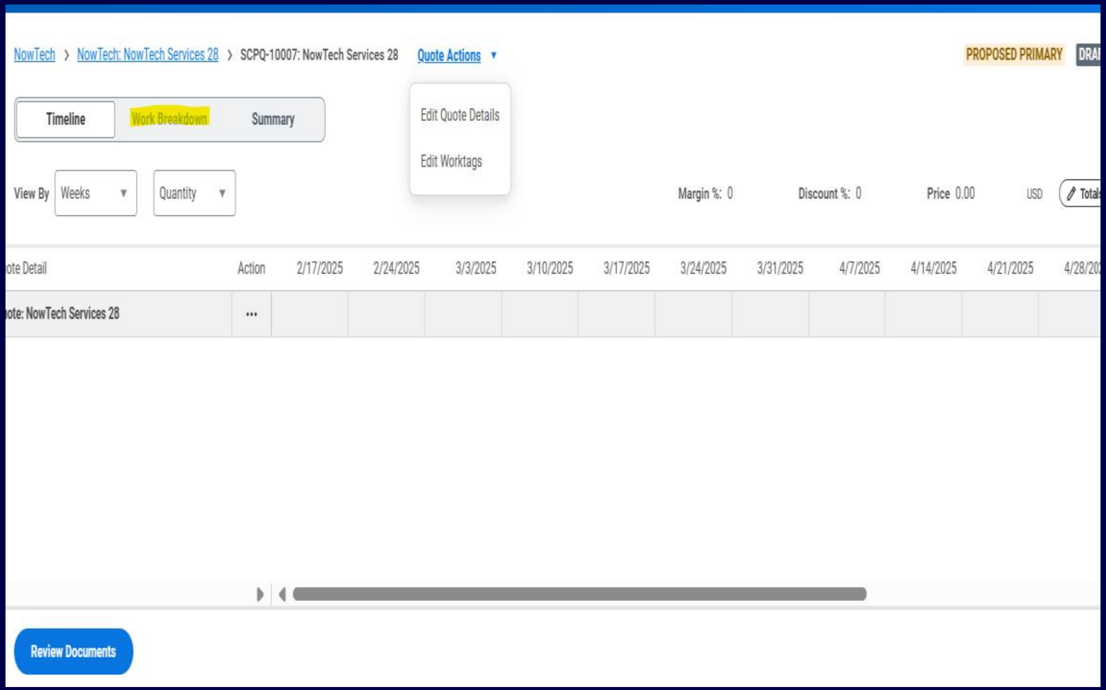
Work Breakdown Structure in CPQ

Impact analysis

Before the release

N/A

After the release



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Service Catalog in Services CPQ

What's changing

With this release, Workday deliver a Services Catalog in the new Services CPQ functionality that enables you to add a service to the quote from a pre-configured list. This capability allows you to pre-define the duration, roles, items, expenses, and third-party costs for a service type and then default all the data into the quote.

What do I need to do

Create a catalog of services for various roles and hours to define the baseline effort needed for the service.

Access the Maintain Services Catalog task.

Click Create Service and specify the values for the duration of the service, roles, items, expenses, and third-party costs. You can also specify the project hierarchy.

If you do not want to isolate the service to just 1 project hierarchy, you can leave it blank. The sales specialist can select it when they add the service to a quote.

You can’t add amounts for expenses and third party costs. The sales specialist will need to enter it when they add the service to a quote. The roles and items will be priced based on the Project Billing Rate Sheet and Sales Item Price List selected by the sales specialist when they add the service to a quote.

https://doc.workday.com/release-notes/en-us/fincpq/8681926.html

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Service Catalog in Services CPQ, cont.

Additional Considerations

Workday deliver a new Maintain Services Catalog task (secured to the Set Up: Quotes and Process: Quotes domain) task that enables you to:

Create a baseline service.

Edit, copy, activate, or inactivate services defined in the catalog. Sales specialists can only add services from a catalog to quotes after the service is activated.

Edit the facets that sales specialists use to search the catalog.

Add or edit snippets to a service.

Note: The services defined in the catalog are created as a High Level service on the quote. Phases and Tasks capability will be added in future releases.

What do I need to do

After creating the service, navigate to the last column for the new service in the same task. Click Action and select Activate. You can also select Edit, Copy, or Inactivate to take further action on the service.

Note: You must activate the pre-configured service as it enables the sales specialists to select it from the catalog when creating a quote.

Create snippets to pre-configure commonly used service-related document content and embed them into quote documents.

Access the Maintain Quote Document Snippet Categories task and click + to add a snippet category.

https://doc.workday.com/release-notes/en-us/fincpq/8681926.html

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Service Catalog in Services CPQ, cont.

Additional Considerations

Workday deliver a new Create Services task (secured to the Set Up: Quotes domain) that you can access from the Maintain Services Catalog task, enabling you to configure default roles, non-recurring items, expenses, third-party costs, duration in weeks, search tags, and project hierarchy for a service. For example, you can create a pre-configured Software service, or Accounting service.

Workday deliver a new Create Snippets task (secured to the Set Up: Quotes domain) that you can access from the Action button of a specific service in the Maintain Services Catalog task.

What do I need to do

Access the Maintain Services Catalog task.

Click Action for a desired service and select Add Snippet.

On the Create Snippet page, select a Document Snippet Category and draft the content for this snippet. When done, click Add.

On the Maintain Quote Configurations task, add the Document Snippet Category to the relevant Document Templates.

https://doc.workday.com/release-notes/en-us/fincpq/8681926.html

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Service Catalog in Services CPQ, cont.

Additional Considerations

Snippets enable your CPQ administrator to add pre-configured service-related document content, providing convenience, and standardization. For example, you can define snippets for standard business language such as Terms & Conditions, Scope, Legal Disclaimers. When you generate a quote document, the snippet content is added automatically based on the services selected in the quote.

Workday recommend adding the name of the Service to the start of each Snippet so as to easily identify them when they are retrieved in the quote document.

Workday also deliver a new Maintain Quote Document Snippet Categories task (secured to the Set Up: Quotes and Process: Quotes domain) that enables you to create, delete, or inactivate categories for snippets you create.

What happens if I do nothing

You won't be able to add a predefined service from the services catalog to the quote.

https://doc.workday.com/release-notes/en-us/fincpq/8681926.html

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Service Catalog in Services CPQ, cont.

Additional Considerations

Note: The snippet category must be added to the Document Template in the Maintain Quote Configuration task to hydrate the content properly in the quote document.

Workday also deliver these new high-performance indexed report data sources (secured to the Process: Quotes domain) that you can use to create custom reports for quotes services and service catalog items for a given customer:

Quote Services

Service Catalog Items

Workday deliver a new Services Catalog Faceted Report report (secured to the Set Up: Quotes and Process: Quotes domain),

https://doc.workday.com/release-notes/en-us/fincpq/8681926.html

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Service Catalog in Services CPQ, cont.

Additional Considerations

enabling you to easily view the available service catalogs by project hierarchy, business unit, snippets, region, and catalog status.

Workday deliver these new report fields on the Service Catalog Item business object (secured to the Public Reporting Items domain), which you can use in custom reports to view the service catalog details and other items in use along with their status and quote.

Name

Description

Service Catalog Duration

Service Catalog Expense

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Service Catalog in Services CPQ, cont.

Additional Considerations

Service Catalog Items

Service Catalog Role

Service Catalog Third-Party Cost

Workday also deliver a new Service Catalog Item report field on the Quote Service Abstract business object (secured to the Public Reporting Items domain), which you can use in custom reports to view the service items used in a quote.

Workday deliver another Service Catalog Item report field on the Quote Document Snippet business object (secured to Public Reporting Items domain), which you can use in custom reports to view the service catalog item with document snippets.

https://doc.workday.com/release-notes/en-us/fincpq/8681926.html

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Service Catalog in Services CPQ, cont.

Additional Considerations

Workday deliver these new web services that you can use to create, update, or retrieve services catalog items or quote document snippet categories and its associated information:

Get Quote Document Snippet Categories

Get Services Catalog Items

Put Quote Document Snippet Category

Put Services Catalog Item

The web services are secured to these domains:

- iLoad Web Services.
- Set Up: Quotes.
- Special OX Web Services.

See the SOAP API Change Log link under Related Information

https://doc.workday.com/release-notes/en-us/fincpq/8681926.html

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Service Catalog in Services CPQ

Impact analysis

Before the release	After the release
Before the release, you cannot use the Purge Person Data task to purge many different Financial attachments and their details.	After the release, Workday deliver a Services Catalog in the new Services CPQ functionality that enables you to add a service to the quote from a pre-configured list. This capability allows you to pre-define the duration, roles, items, expenses, and third-party costs for a service type and then default all the data into the quote.

Impact description
Enables to add a service to the quote from a pre-configured list. This capability allows you to pre-define the duration, roles, items, expenses, and third-party costs for a service type and then default all the data into the quote.

https://doc.workday.com/release-notes/en-us/fincpq/8681926.html

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Setup required

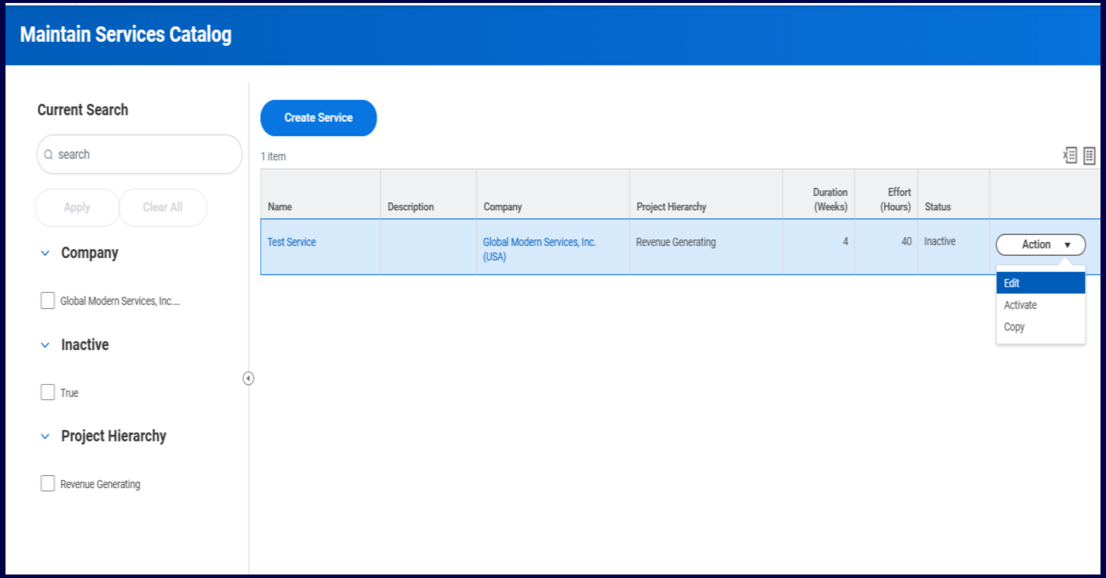
Services Catalog in Services CPQ

Impact analysis

Before the release

N/A

After the release



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Setup required

Quote Grid in Services CPQ

What's changing

With this release, Workday deliver a Quote Grid in the new Services CPQ functionality that enables you create quotes dynamically for an opportunity. The quote leverages shared PSA data such as standard project cost rates, project billing rate sheets, project roles, sales items, and worktags. It enables you to:

View or edit Quotes in different timeline-based views by weeks, months, contract years, or summary view.

View or edit Quotes in different amount-based views by quantity, price, cost, or FTE (Full Time Equivalent).

Add Daily or Hourly Rates for quote roles.

Estimate service effort at either a high level, or define a

What do I need to do

Enable the Services CPQ functional area and the required security domains and business processes.

In addition to setting up the Quote Event, ensure to review and test the business processes for Create Project, Edit Project, Project Resource Plan Line, Convert Opportunity Project to Project, Create Customer Contract

Access the Maintain Services CPQ Settings task to configure the default settings for General Quote Settings and Defaulting Settings for Contract and contract lines, Billing schedule templates, and Revenue Treatment.

Access the Edit Tenant Setup - Financials task to define rules for assigning unique quote numbers to quote documents in the desired sequence.

https://doc.workday.com/release-notes/en-us/fincpq/8681929.html

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Quote Grid in Services CPQ, cont.

What's changing

More granular work breakdown structure (WBS) using phases or phases and tasks.

Add quote lines within a service to represent roles, items and recurring items, expenses, third party costs, and discounts.

Quote for services with fixed fee or time and expense billing models.

Automatically adjust quote line prices by setting a specific Price, Margin, or Discount target value for a service or quote.

Prohibit discounts in role lines, excluding them from service adjustments.

What do I need to do

Review Maintain Worktag Usage task and Maintain Custom Validations to ensure required fields are aligned across Quotes, Projects, and Customer Contracts

Access the Maintain Quote Configurations task to define quote configurations and document templates. Ensure that they are published.

Ensure that you have configured these in Workday Financials:

Opportunities

Project Billing Rate Sheets, Sales Item Price Lists, Sales Items, Rate Categories, and Rate Category Members (optional) from Workday Revenue.

https://doc.workday.com/release-notes/en-us/fincpq/8681929.html

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Setup required

Quote Grid in Services CPQ, cont.

Additional Considerations

With this update, Workday deliver these new security domains (secured to the Services CPQ functional area) that you can use to secure access quote configuration and quote data:

Process: Quotes

Set Up: Quotes

Workday deliver these new tasks (secured to the Process: Quotes domain) that you can use to create and edit quotes:

Create Quote

Edit Quote

You can also access these tasks from the related actions of an approved quote:

What do I need to do

Project Billing Rate Sheets are used to default price of a role into a quote

Sales Item Price Lists are used to default price of an item into a quote

Sales Items:

You will need to mark the Sales Items as Quotable in order to use them on quotes

Unit Cost on the Sales Item is supported to default cost of an item into quotes

Rate Categories and Rate Category Members are used for more specific attributes to drive a more specific rate to default in on a role. These attributes can be set up on the Project Billing Rate Sheet and then selected on the role on the quote to default in a more specific price.

https://doc.workday.com/release-notes/en-us/fincpq/8681929.html

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Quote Grid in Services CPQ, cont.

What's changing

Change Quote

Cancel Quote

Copy Quote

After a modified quote is approved, you can view the changes on the existing quote. Workday automatically updates the downstream project with the new information.

Workday deliver a new Maintain Services CPQ Settings task (secured to the Set Up: Quotes domain) that you can use to configure:

General Quote Settings

Downstream Defaulting Settings for :

What do I need to do

Project Standard Cost Rate Sheet from Workday Projects

Project Standard Cost Rate Sheet is supported to default cost into quotes

Default Rate or Default rate by Project Roles is supported

Project Roles and Project Hierarchies from Workday Projects.

Project Roles and Project Hierarchies will default into the picklist of selectable roles and hierarchies on a quote.

Revenue Categories

https://doc.workday.com/release-notes/en-us/fincpq/8681929.html

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Quote Grid in Services CPQ, cont.

Additional Considerations

Contract and contract line from quotes

Billing schedule templates from quotes

Revenue Treatment from quotes

For more details on downstream automation see the related release note.

Workday deliver these check boxes on the Maintain Services CPQ Settings task, enabling you to override a unit cost on a quote role line.

What happens if I do nothing

You won't be able to use the quote grid to create quotes in your tenant.

https://doc.workday.com/release-notes/en-us/fincpq/8681929.html

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Setup required

Quote Grid in Services CPQ

Impact analysis

Before the release	After the release
Before the release, this fetaure does not exist	After the release, Workday deliver a Quote Grid in the new Services CPQ functionality that enables you create quotes dynamically for an opportunity. The quote leverages shared PSA data such as standard project cost rates, project billing rate sheets, project roles, sales items, and worktags.

Impact description
Delivers a Quote Grid in the new Services CPQ functionality that enables you create quotes dynamically for an opportunity. The quote leverages shared PSA data such as standard project cost rates, project billing rate sheets, project roles, sales items, and worktags.

https://doc.workday.com/release-notes/en-us/fincpq/8681929.html

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Setup required

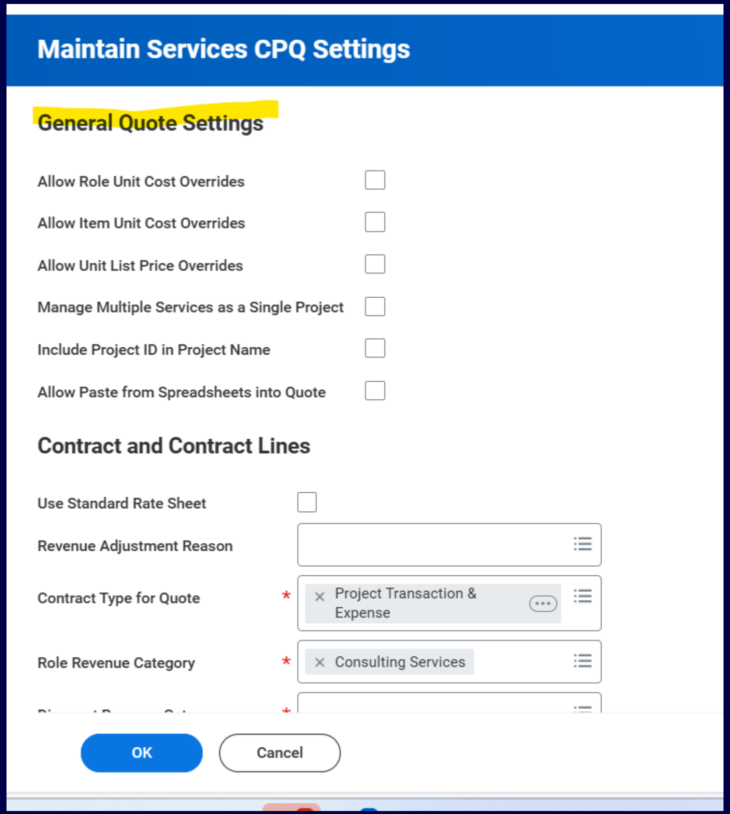
Quote Grid in Services CPQ

Impact analysis

Before the release

N/A

After the release



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Quote Document Generation in Services CPQ

What's changing

With this release, Workday delivers automated document generation capability in the new Services CPQ functionality, enabling you to set up custom quote document templates and service catalog snippets that allows you to generate documents dynamically in PDF and DocX file formats from quote-specific data and content.

What do I need to do

Access the Maintain Quote Configurations task.

Click Create Quote Configuration button.

To use an existing configuration, click Copy Templates From.

Click Add Document Template on the View Quote Configuration page to create a new quote document template.

Type a name for the document template. Workday recommend using fewer than 100 characters, and avoid special characters such as the ampersand (&), to ensure cross-product compatibility.

https://doc.workday.com/release-notes/en-us/fincpq/8681924.html

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Quote Document Generation in Services CPQ, cont.

Additional Considerations

Workday deliver a new Maintain Quote Configurations report (secured to the Set Up: Quotes domain) that you can use to manage the various quote document templates for a company.

Workday add a Create Quote Configuration button to the Maintain Quote Configurations report that enables you to create new configurations for a company or copy an existing configuration to get started. When in Active status, this configuration displays as an option in the prompt for the specified company during quote creation.

Workday deliver the View Quote Configuration report that you can access from the Maintain Quote Configurations report by clicking:

A quote configuration.

What happens if I do nothing

You won’t be able to define the document template and quote configurations for using in a quote.

https://doc.workday.com/release-notes/en-us/fincpq/8681924.html

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Quote Document Generation in Services CPQ, cont.

Additional Considerations

The Create Quote Configuration button.

The View Quote Configuration report enables you to:
View, edit, or remove existing document templates.

Activate or Inactivate the quote configuration.

Access the Add Quote Document Template task from the Add Document Template button.

The Add Quote Document Template task allows you to configure a new document template or copy an existing document template and Publish it.

Note:

A quote configuration can have multiple document templates.

vhttps://doc.workday.com/release-notes/en-us/fincpq/8681924.html

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Quote Document Generation in Services CPQ, cont.

Additional Considerations

To be able to use the template in the quote, it must be first published. Unpublished changes to the document template will not display in any quote documents.

New quotes will use the most recently published version of the document template.

Existing quotes won’t reflect the any changes you make to the document template. Click the Reset to Template button to fetch the latest version of the document template.

When you click the Review Document button on the Create Quote page, Workday adds the latest quote data to the document template that you selected at the start of quote creation.

https://doc.workday.com/release-notes/en-us/fincpq/8681924.html

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Quote Document Generation in Services CPQ, cont.

Additional Considerations

When you click the Review Document button on the Edit Quote page, you need to click the Refresh Document Data button to update the dynamic data fields with the latest quote data.

When you make manual edits to the quote document during the review process, click the Save button to retain those changes.

Workday deliver these options for the Service Type in the Quote Event business process that enables you to print quote documents automatically after they are approved:

Print Quote Documents PDF

Print Quote Documents DocX

https://doc.workday.com/release-notes/en-us/fincpq/8681924.html

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Quote Document Generation in Services CPQ, cont.

Additional Considerations

Note: If you want the documents to be available to the approvers during the Review step, ensure to configure either one or both of the print service steps to run before the Approval step in the business process definition.

Workday add these to the existing View Opportunity report:

Print Documents option in the Actions button that you can select to print the associated quote in the desired format.

Submitted Document column that displays the number of documents printed for a quote. You can click the number to access the printed files.

Workday deliver these new reports (secured to the Set Up: Quotes domain), that you can access to view, edit, and remove document templates:

https://doc.workday.com/release-notes/en-us/fincpq/8681924.html

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Setup required

Quote Document Generation in Services CPQ

Impact analysis

Before the release	After the release
Before the release, this feature does not exist	After the release, deliver these check boxes on the Maintain Services CPQ Settings task, enabling you to override a unit cost on a quote role line.

Impact description
Maintain Services CPQ Settings task, enabling you to override a unit cost on a quote role line.

https://doc.workday.com/release-notes/en-us/fincpq/8681924.html

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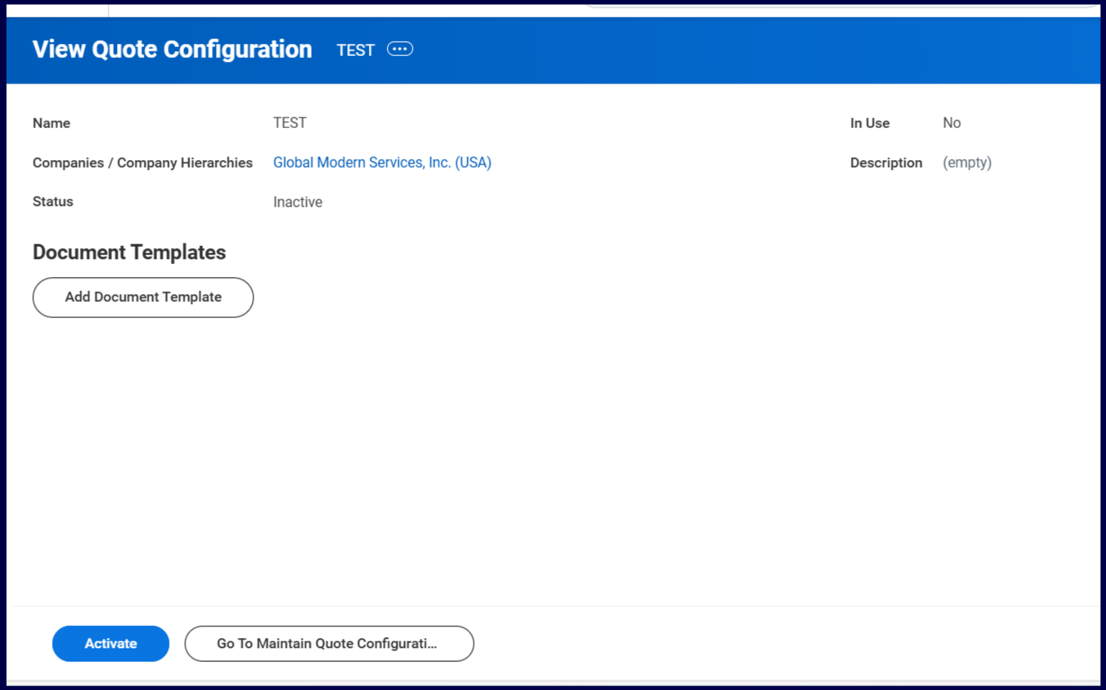
Quote Document Generation in Services CPQ

Impact analysis

Before the release

N/A

After the release



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Setup required

Quote to Projects and Contracts Automation in Services CPQ

What's changing

With this release, when you use the new Services CPQ functionality, Workday enable you to automate the creation of projects and contracts from quote data.

You can configure these parameters to create and populate values for a quote line:

Project ID in Project Name

Merge multiple services into a single project

Project billing rate sheet

Sales item price list

Rate categories

Use Standard Rate Sheet (when you select this option in the settings, Workday recommend that you also specify the default Revenue Adjustment Reason.)

What do I need to do

Access the Maintain Services CPQ Settings task.

Under the General Quote Settings section:

Select the Manage Multiple Services as a Single ~Project~ check box to combine all services into 1 project.

Select the Include ~Project~ ID in ~Project~ Name checkbox to display project ID in the project name.

Under the Contract and Contract Lines section:

Select the Use Standard Rate Sheet check box to determine the billing rate.

Select an option from the Revenue Adjustment Reason prompt to display on the contract rate sheet.

https://doc.workday.com/release-notes/en-us/fincpq/8681911.html

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Quote to Projects and Contracts Automation in Services CPQ, cont.

What's changing

Default Contract Type for Quote

Default Revenue category for discount, role, expense, and third-party costs.

Default Revenue treatment of invoice, deferred, or accrued.

Default Revenue schedule template for quote role lines, third party cost lines, and expense lines based on the billing method of fixed fee or time & expense.

A default revenue adjustment reason for contract rate sheets created from Services CPQ.

What do I need to do

Select an option from the Contract Type for Quote prompt.

Select an option for Role, Discount, Expense, and Third Party Cost Revenue Category to create billable project lines with an appropriate transaction source.

Under the Revenue Treatment section, select an option from these prompts for each billing model and associated quote line item:

Revenue Treatment for Customer Contract Line

Revenue Schedule Template for Customer Contract Line

You can also specify the Billing Schedule Templates for various quote lines.

https://doc.workday.com/release-notes/en-us/fincpq/8681911.html

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Quote to Projects and Contracts Automation in Services CPQ, cont.

Additional Considerations

Workday deliver these check boxes on the Maintain Services CPQ Settings task that you can select to automatically populate relevant data in downstream Projects and Contracts:

Manage Multiple Services as a Single ~Project~

Include ~Project~ ID in ~Project~ Name

Use Standard Rate Sheet: When set to true, role rates are priced based on the Standard Rate Sheet and not the rates from the quote.

Workday also deliver these prompts on the Maintain Services CPQ Settings task that you can select to automatically populate relevant data in downstream Projects and Contracts:

What do I need to do

Note: Downstream conversion on the contract rate sheet:

Unit Price from the quote = Contract Rate on the contract rate sheet

Unit List Price from the quote = Standard Rate on the contract rate sheet

Note: You must also configure these to populate the project hierarchy, billing rates for labor, cost rate sheets, and sales item price lists:

Steps: Configure Customer Contracts

Concept: Sales Items

Steps: Set Up Project Pricing and Billing

Concept: Project Billing

Reference: Billing Rate Rule Types for Projects

https://doc.workday.com/release-notes/en-us/fincpq/8681911.html

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Quote to Projects and Contracts Automation in Services CPQ, cont.

Additional Considerations

Contract Type for Quote

Discount Revenue Category

Expense Revenue Category

Revenue Adjustment Reason

Role Revenue Category

Revenue Schedule Template for Customer Contract Line

Revenue Treatment for Customer Contract Line

Third Party Cost Revenue Category

Workday deliver these new web services (secured to the Set Up: Quotes domain) that you can use to create, update, or retrieve all fields for default settings for Services CPQ:

What happens if I do nothing

You won’t be able to use the functionality.

https://doc.workday.com/release-notes/en-us/fincpq/8681911.html

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Quote to Projects and Contracts Automation in Services CPQ, cont.

Additional Considerations

Get Services CPQ Settings

Put Services CPQ Settings

See the SOAP API Change Log link under Related Information.

Note: You can also generate an EIB spreadsheet template with data using the Put Maintain Services CPQ Settings template for mass uploads.

To support downstream automation in Projects, Workday also make these enhancements:

Workday deliver a Recalculate Services CPQ Resource Forecast service on the Project Resource Plan Line business process that you can configure to update forecasts automatically or conditionally

https://doc.workday.com/release-notes/en-us/fincpq/8681911.html

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Quote to Projects and Contracts Automation in Services CPQ, cont.

Additional Considerations

When a Services CPQ user deletes a Service: Workday deletes the corresponding resource plan lines and resource forecast lines.

When a Services CPQ user deletes a quote role line: Workday deletes the corresponding resource plan lines, resource forecast lines, Task Resources, and any pending Request Worker events.

Note: You must add the service to the business process after the Request Worker step.

Workday add a Quote field on these tasks and reports that enables you to access the quote details when the project is created from a quote:

Create Project

Edit Project

https://doc.workday.com/release-notes/en-us/fincpq/8681911.html

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Quote to Projects and Contracts Automation in Services CPQ, cont.

Additional Considerations

View Projects

Workday add a new Service field on the resource plan line that displays the name of the service from the quote.

Workday also add the Service field to these tasks and reports:

- Create Project business process - review and revise steps.
- Create Resource Plans for Projects.
- Delete Resource Plan Detail.
- Edit Project.
- Edit Project Resource Plan.
- Edit Resource Plan.
- Edit Resource Plan for Project.

https://doc.workday.com/release-notes/en-us/fincpq/8681911.html

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Setup required

Quote to Projects and Contracts Automation in Services CPQ, cont.

Additional Considerations

Edit Resource Plan Line.

Project Resources.

Project Resource Plan Line business process – review and revise steps.

Synchronize Resource Plan Dates.

View Project Resource Plan.

View Resource Plan Line.

Workday deliver a new View: Quote Project Hierarchies domain (secured to the Services CPQ functional area) that you can use to secure access to select project hierarchies when creating quotes.

Workday also add these new report fields on the Project.

https://doc.workday.com/release-notes/en-us/fincpq/8681911.html

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Quote to Projects and Contracts Automation in Services CPQ

Impact analysis

Before the release	After the release
Before the release, this feature does not exist	With this release, when you use the new Services CPQ functionality, Workday enable you to automate the creation of projects and contracts from quote data.

Impact description
When you use the new Services CPQ functionality, Workday enable you to automate the creation of projects and contracts from quote data.

https://doc.workday.com/release-notes/en-us/fincpq/8681911.html

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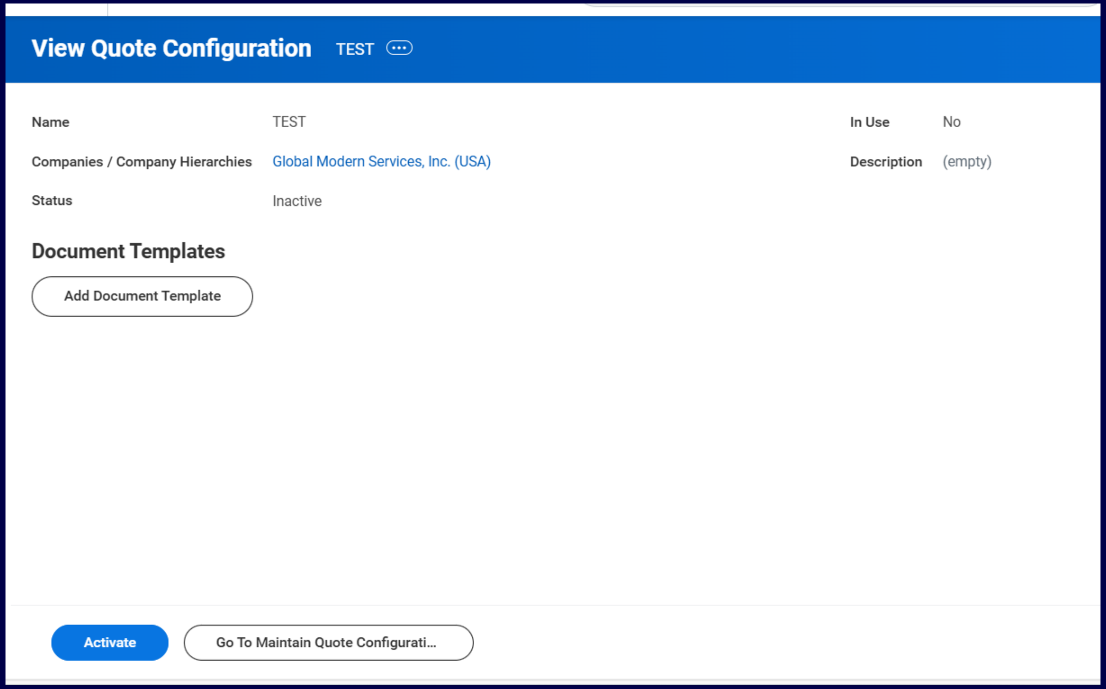
Quote to Projects and Contracts Automation in Services CPQ

Impact analysis

Before the release

N/A

After the release



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Recruiting

Back to table of contents

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Automatically available

Candidate Home Usability

What's changing

With this release, Workday updates the Candidate Home to improve the user experience for candidates completing disability status and government ID tasks.

This improves the Candidate Home experience and increases efficiency for external candidates completing application tasks.

Additional considerations

Workday redesigns these tasks on Candidate Home and now display them as pop-up modals instead of separate pages:

- Update Candidate U.S. Disability Status.
- Change Government Identifiers.

What do I need to do

No steps need to be taken. This feature is automatically available.

What happens if I do nothing

Candidates accessing any of the tasks on Candidate Home will see the changes.

https://doc.workday.com/release-notes/en-us/cxs/8758833.html

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Candidate Home Usability, cont.

Additional considerations

- When a candidate completes any of these tasks, workday displays the task confirmation message, as well as any remaining tasks in the same pop-up modal.
- Workday also update the task with labels for each ID the candidate adds (Government ID 1, Government ID 2, National ID 1, etc.).
- Workday update the checksum validation to trigger as an alert instead of an error, allowing candidates to submit the task even with the validation.

https://doc.workday.com/release-notes/en-us/cxs/8758833.html

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Candidate Home Usability

Impact analysis

Before the release	After the release
Candidates accessing any of the tasks on Candidate Home will these task on separate page.	Candidate Home to improve the user experience for candidates completing disability status and government ID tasks.

Impact description
Candidates accessing any of the tasks on Candidate Home will see the task as pop-up modals instead of separate pages.

[link to release note in community]

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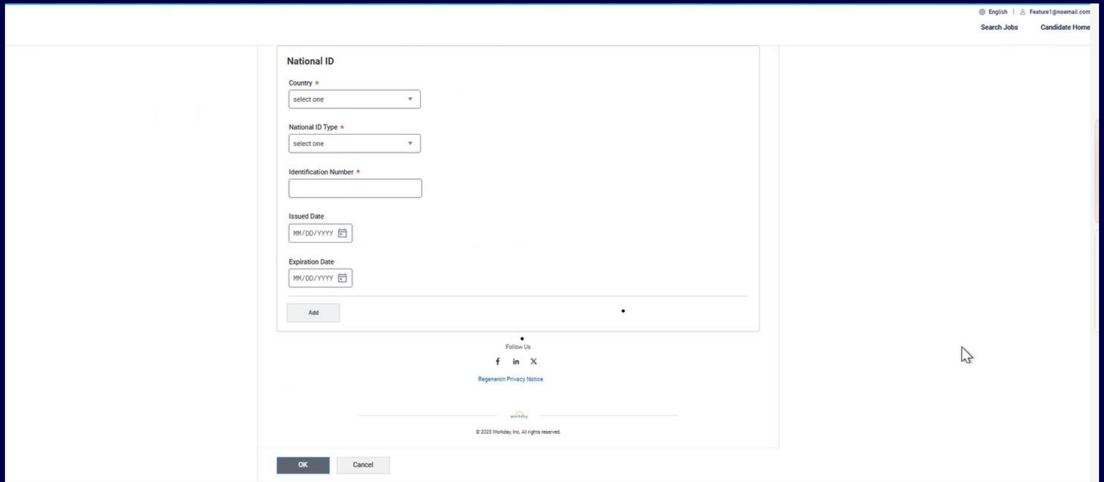
Automatically available

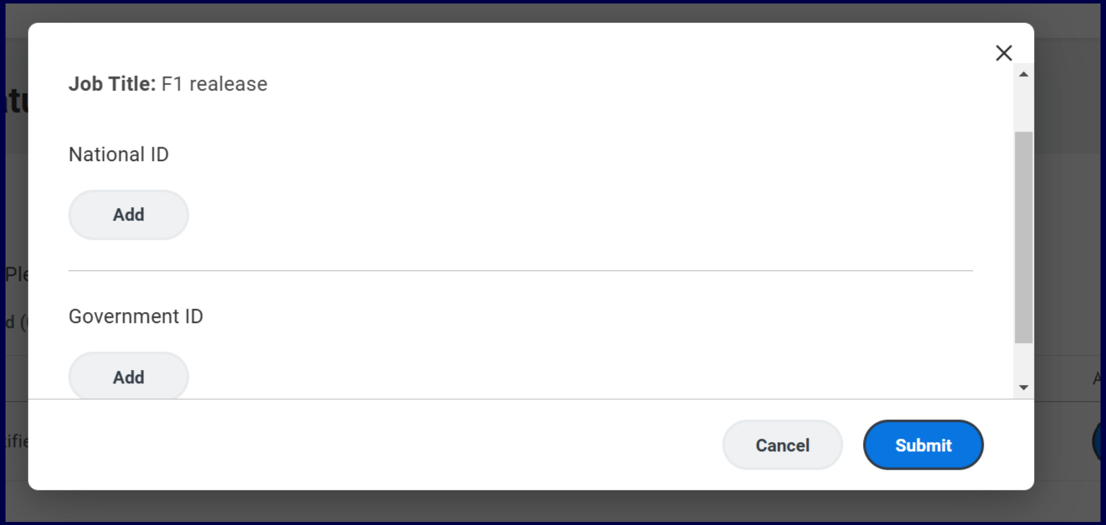
Candidate Home Usability

Impact analysis

Before the release



After the release



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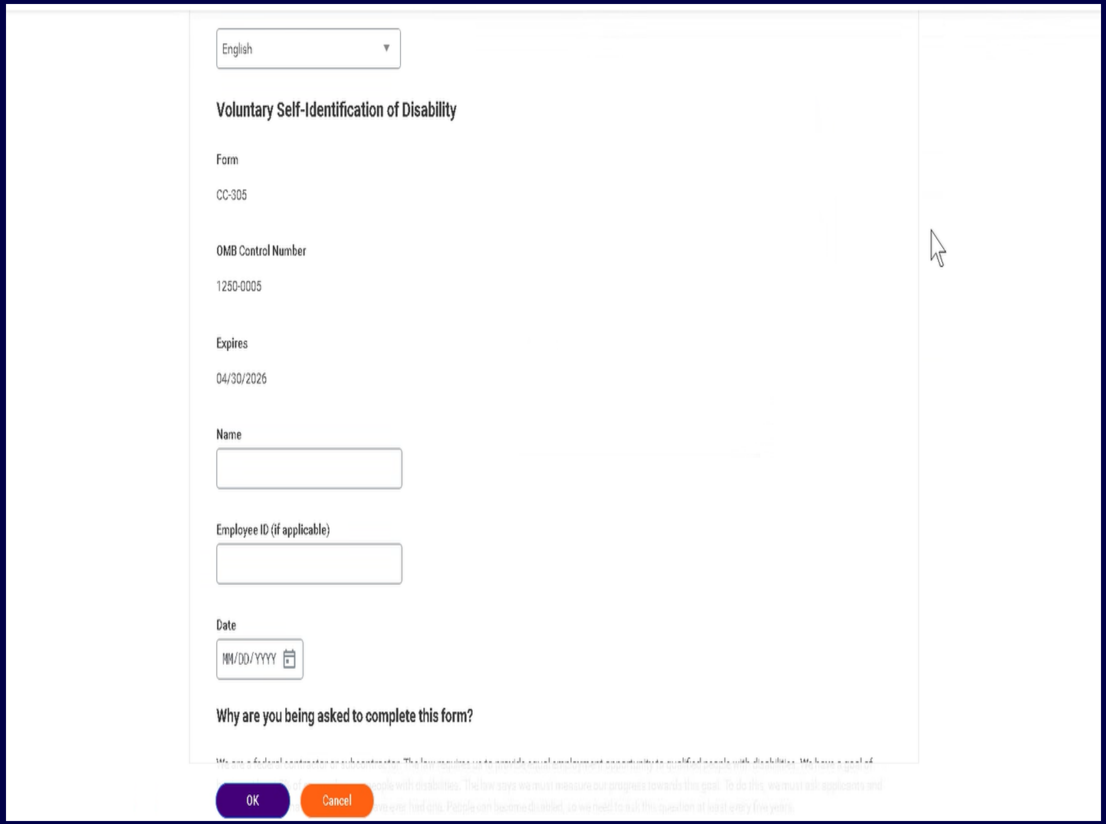
Automatically available

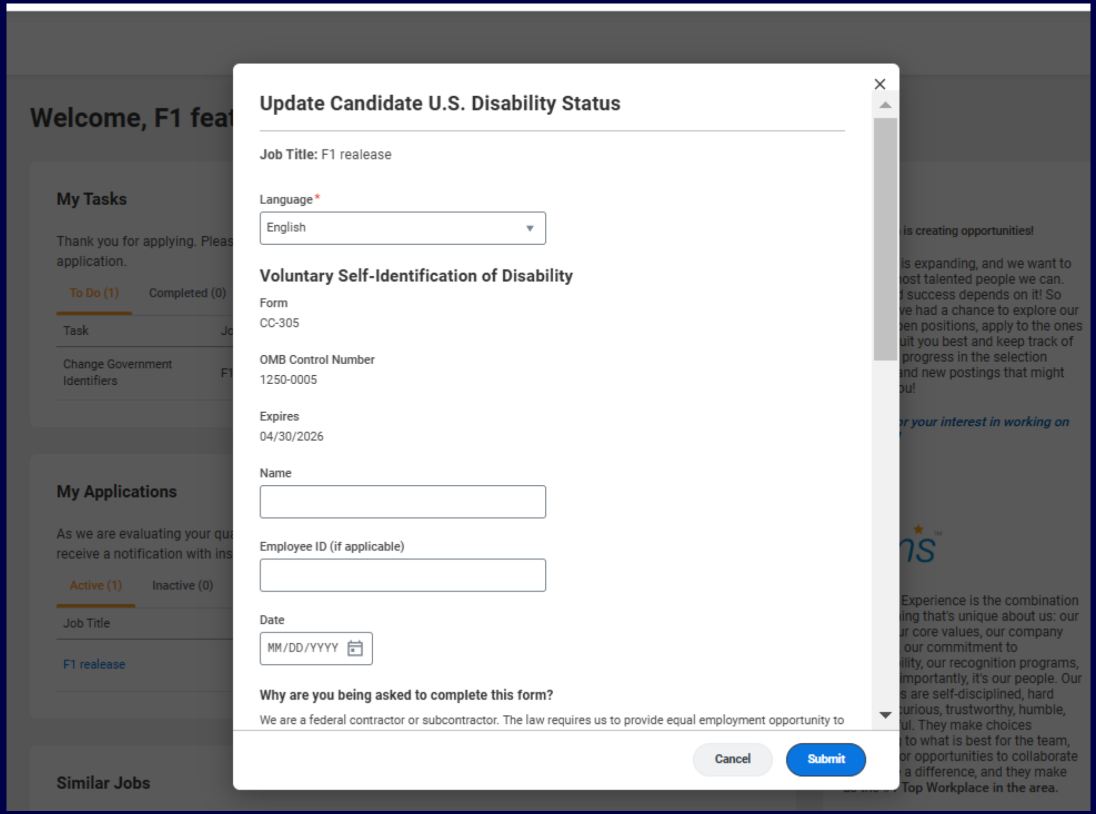
Candidate Home Usability

Impact analysis

Before the release



After the release



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Automatically available

Validation Message for Send Message Task

What's changing

With this release, Workday adds a validation message on the Send Message task on the Candidate Grid, to limit the number of candidates you can email through the task.

Additional considerations

Limiting the number of candidates you can email at once to 1,000 through the Send Message task enhances recruiter-candidate communication by reducing the risk of emails being flagged as spam.

Workday add this validation message to the Send Message task on the Candidate Grid on job requisitions and evergreen requisitions: You can't send an email to more than 1000 candidates at once. For larger groups, consider using Candidate Pools.

What do I need to do

You don't need to do anything. This enhancement is automatically available, and the validation message will only display if the number of candidates you wish to email using the Send Message task exceeds 1,000.

What happens if I do nothing

You will continue to use the Send Message task as normal. The validation message will only display if you exceed 1,000 candidates.

https://doc.workday.com/release-notes/en-us/hrrec/8619053.html

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Automatically available

Validation Message for Send Message Task

Impact analysis

Before the release	After the release
You will continue to use the **Send Message** task as normal. The validation message will not display if you exceed 1,000 candidates.	You will receive a validation message on the Send Message task on the Candidate Grid, to limit the number of candidates you can email through the task.

Impact description
Limiting the number of candidates you can email at once to 1,000 through the Send Message task on job requisition and evergreen job requisition candidate grid.

https://doc.workday.com/release-notes/en-us/hrrec/8619053.html

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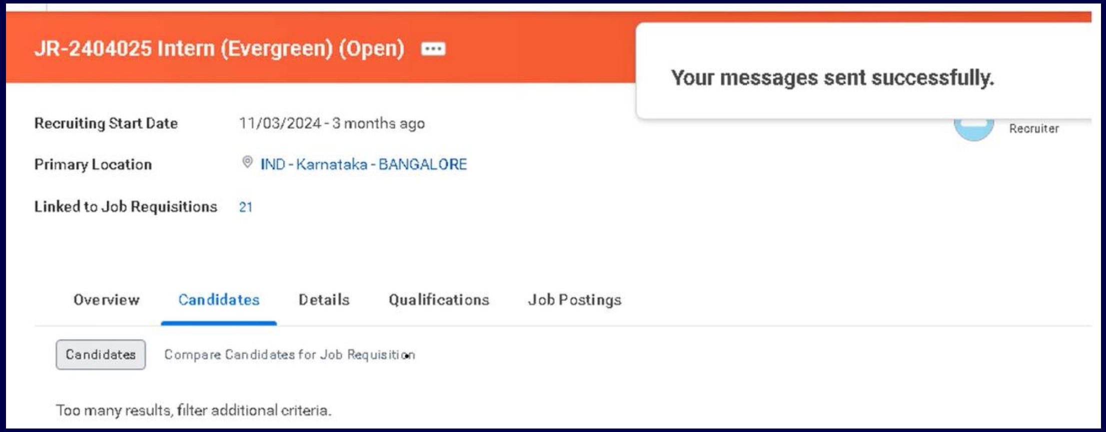
Automatically available

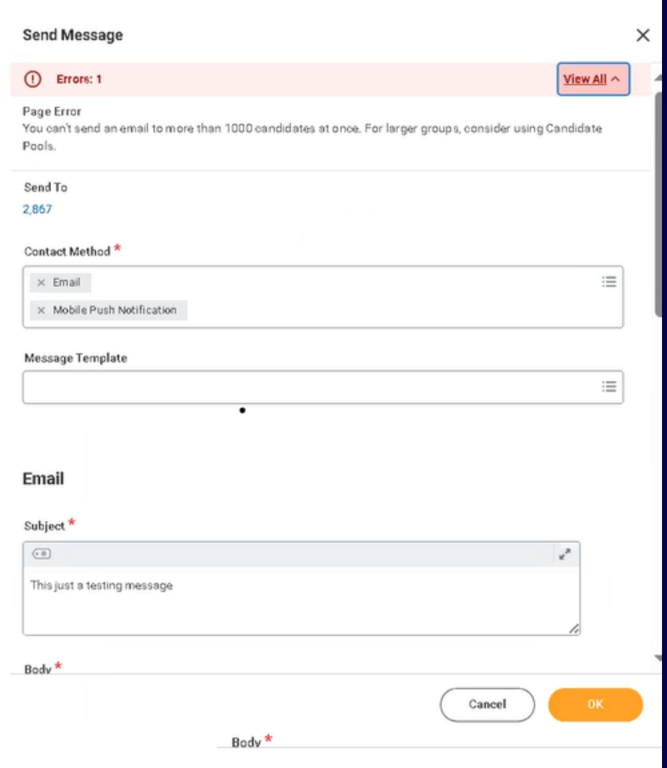
Candidate Home Usability

Impact analysis

Before the release



After the release



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Non-US English Locales on External Career Sites

What's changing

Workday enhances the candidate experience by enabling you to configure the external career site with non-US English locale options. This allows candidates outside the United States to enter dates in the DD/MM/YYYY & YYYY/MM/DD format, aligning with their local date conventions.

Additional considerations

Enabling candidates to enter dates in the local format:

- Enhances the candidate experience by removing confusion, leading to a smoother and more intuitive job application process.
- Supports localization on a global scale by ensuring regional language and date preferences are respected.
- Improves data accuracy by minimizing errors during the job application process and reducing the risk of incomplete or incorrect submissions.

What do I need to do

On the Edit External Career Site task select English (United Kingdom) and English (Canada) from the Languages prompt.

What happens if I do nothing

You'll see no changes and the External Career Site will work as it currently does.

https://doc.workday.com/release-notes/en-us/cxs/8431086.html

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Non-US English Locales on External Career Sites, cont.

Additional considerations

You can now configure the external career site with a non-US English option, ensuring that candidates outside the United States can enter dates in the DD/MM/YYYY & YYYY/MM/DD formats across all date fields on the site. Example: Preferred Locale: English (United Kingdom) and Date of Birth: 02/12/2025.

https://doc.workday.com/release-notes/en-us/cxs/8431086.html

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Non-US English Locales on External Career Sites

Impact analysis

Before the release	After the release
Prior to the release, Candidates are unable to enter dates in the DD/MM/YYYY and YYYY/MM/DD formats across all date fields on the site.	With this release, you can now configure the external career site with a non-US English option. This allows candidates outside the United States to enter dates in the DD/MM/YYYY and YYYY/MM/DD formats across all date fields on the site by updating the candidate's preferred language in their candidate home. For example, with the preferred locale set to English (United Kingdom), a date of birth would be entered as 02/12/2025.

Impact description
Candidates would be able to enter the dates in the local format.

https://doc.workday.com/release-notes/en-us/cxs/8431086.html

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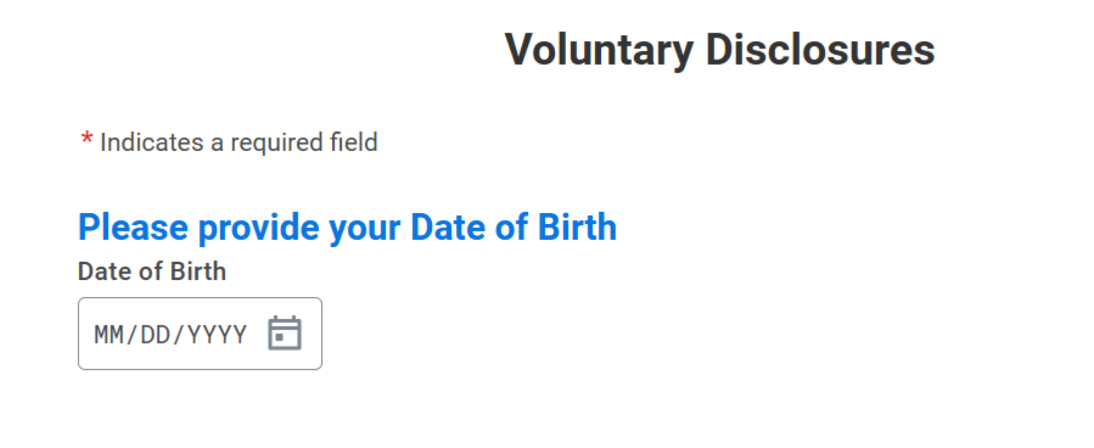
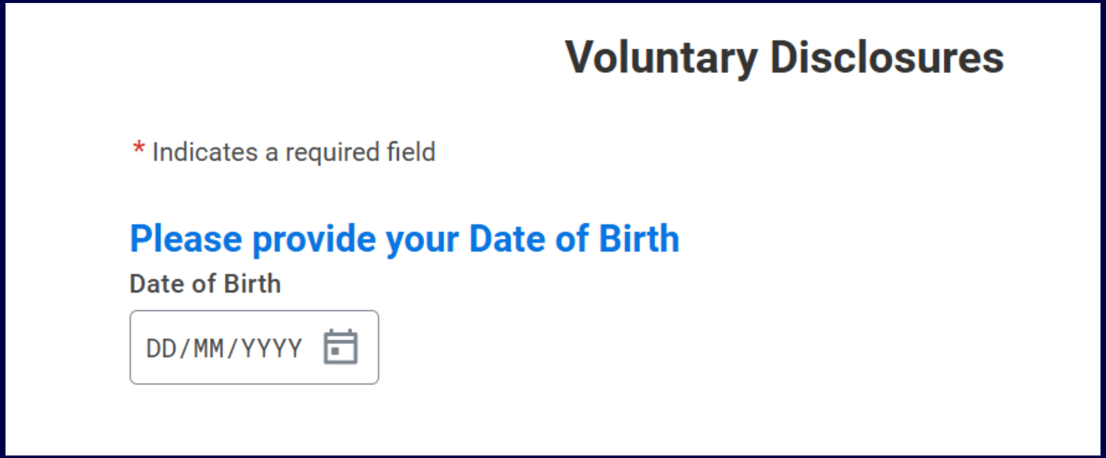
Non-US English Locales on External Career Sites

Impact analysis

Before the release



After the release



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Multiple Language Search for Job Description and Job Posting Title

What's changing

In this release, Workday enables multi-language search for translated job postings including the Job Description and the Job Posting Title on the external career sites, allowing candidates to find job opportunities in their preferred language.

Additional considerations

Multiple language search on the external career site:

- Improves the candidate experience by allowing candidates to search for jobs in their preferred language.
- Expands the talent pool by attracting a diverse range of candidates, increasing the likelihood of finding the best talent.
- Ensures legal compliance by making job opportunities accessible in multiple languages, as required by local labor laws.

What do I need to do

On the Edit External Career Site task select English (United Kingdom) and English (Canada) from the Languages prompt.

What happens if I do nothing

You'll see no changes and the External Career Site will work as it currently does.

https://doc.workday.com/release-notes/en-us/cxs/8715589.html

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Setup required

Multiple Language Search for Job Description and Job Posting Title, cont.

Additional considerations

Candidates can now view existing and translated job postings including the Job Description and Job Posting Title, on the external career site in all languages supported by Workday.

https://doc.workday.com/release-notes/en-us/cxs/8715589.html

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Multiple Language Search for Job Description and Job Posting Title

Impact analysis

Before the release	After the release
Candidates were unable to perform multi-language searches for translated job postings, including the Job Description and Job Posting Title, on external career sites in all languages supported by Workday.	With these release, Workday enables multi-language search for translated job postings including the Job Description and the Job Posting Title in all languages supported by Workday on the external career. Candidates can now access both existing and translated job postings, including the Job Description and Job Posting Title by, updating the candidate's preferred language in their candidate home.

Impact description
Candidates can now access both existing and translated job postings, including the Job Description and Job Posting Title by, updating the candidate's preferred language in their candidate home.

https://doc.workday.com/release-notes/en-us/cxs/8715589.html

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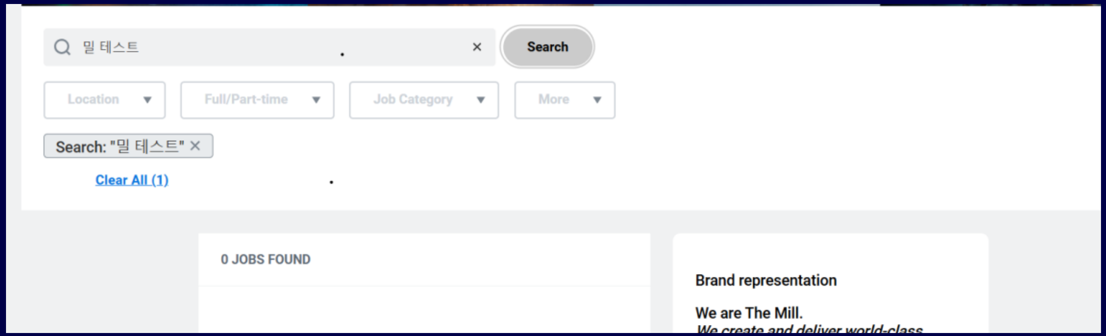
Setup required

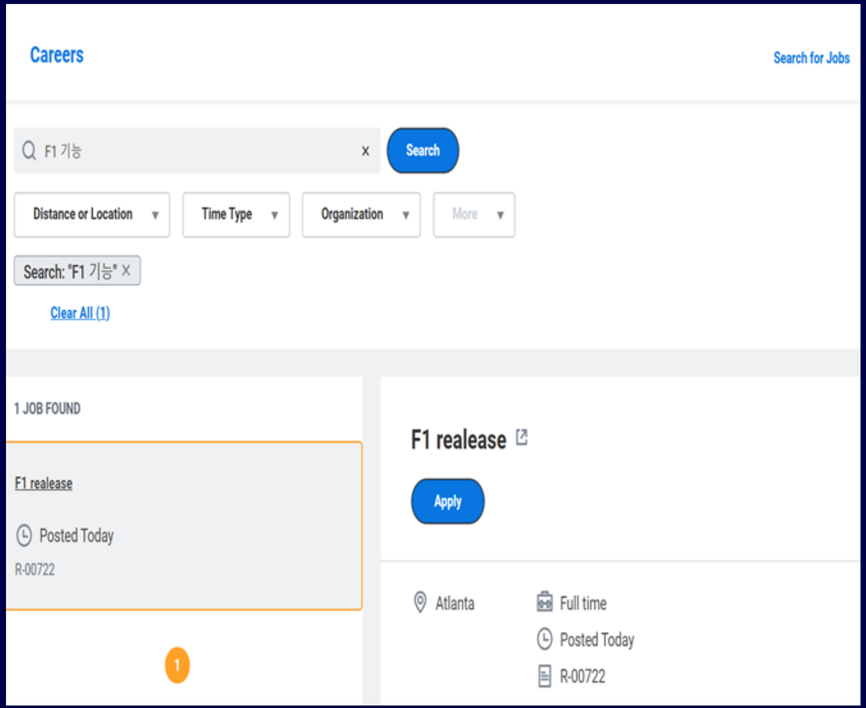
Multiple Language Search for Job Description and Job Posting Title

Impact analysis

Before the release



After the release



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New Workday Onboarding Experience

What's changing

Workday enhances the onboarding experience, enabling you to send personalized and engaging content to new hires at defined stages of their onboarding period.

Additional considerations

- This new functionality allows you to send targeted preboarding content to candidates as soon as they receive an offer or employment agreement, bridging the gap until they receive access to Workday.
- After receiving their Workday account, you can continue to connect with your new hires and share the information they need to prepare for their role even before Day 1. With their Workday account, they can log in and complete any compliance tasks in their Onboarding Plan, ensuring HR has all the necessary details for a smooth setup.

What do I need to do

Prerequisites for External Preboarding [Recruiting customers only]

External Preboarding relies on the use of an External Career Site. (Recruiting customers only).

Use 1 or all these business processes:

- Hire.
- Contract Contingent Worker.
- Employment Agreement (Recruiting customers only).
- Offer (Recruiting customers only).

Enable these functional areas:

- Onboarding.
- Recruiting (Recruiting customers only).
- Messaging (Messaging customers only).

https://doc.workday.com/release-notes/en-us/onb/8133451.html

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New Workday Onboarding Experience, cont.

Additional considerations

An engaging onboarding experience drives business success by creating a welcoming and informative initial interaction for new employees. This fosters a positive workplace culture and boosts confidence, resulting in:

- Fewer 'no shows' on their first day.
- Increased new hire retention and reduced turnover costs.
- Higher job satisfaction and improved productivity.

Changes

Security Domains: Workday add these new security domains in the Onboarding functional area.

What do I need to do

4.To use Video you might need to Opt-In to Workday Media Cloud and sign the Workday Media Cloud Agreement.

Security

- Administrator access to the Onboarding Planner: Grant Modify permission to the appropriate security groups on the domain Set Up: Onboarding.
- Pre-Hire access to the External Preboarding site: Grant Modify permission to the security group External Pre-Hire as Self access on the domain Self Service: Onboarding. [Recruiting customers only].

https://doc.workday.com/release-notes/en-us/onb/8133451.html

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New Workday Onboarding Experience, cont.

Additional considerations

- Manage: Onboarding Audience Condition Rules: Enables you to manage condition rules for audiences for Onboarding Plans.
- View: Onboarding Plans Preview: Enable you to preview the configuration of Onboarding Plan details for a person or Plan Assignment.

Onboarding Plan

You can now assign your new hires an Onboarding Plan that contains all of the content they need throughout their onboarding period. A new hire can access their Onboarding Plan:

What do I need to do

- Employee access to Onboarding Plans internally from day one:
  Grant Modify permission to the security group Employee As Self (and Contingent Worker As Self) on the do Self Service: Onboarding.
- Configure security policy for the Worker Data: Onboarding domain to access reports.
- Condition Rule configuration: Grant access to domain Manage: Onboarding Audience Condition Rules to enable users to manage condition rules for audiences for Onboarding Plans.
- Onboarding Plan Configuration Preview: Grant access to domain View: Onboarding Plans Preview to enable users to preview configuration of Onboarding Plan details for a person or Plan Assignment.

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New Workday Onboarding Experience, cont.

Additional considerations

- Externally: Through the new External Preboarding site, bridging the engagement gap while the new joiner only has access through their Candidate Home account. (Recruiting customers only).
- Internally: Within the tenant after receiving their Workday account credentials. (All HCM customers).

Note: Once the new hire logs into their Workday account in Production for the first time, they will no longer access their Onboarding Plan through the External Preboarding site. Instead, when accessing the External Preboarding site, they will be directed to their Onboarding experience within the tenant.

What do I need to do

Onboarding Plan Assignment Service

To configure when Onboarding Plans are available to onboarding hires, you can setup Onboarding Plan Assignment as a step on these business processes:

- Contract Contingent Worker.
- Employment Agreement (Recruiting customers only).
- Hire.
- Offer (Recruiting customers only).

When a new hire reaches the stage with a configured Onboarding Plan Assignment, step they're immediately:

- Assigned their Onboarding Plan Assignment.
- Placed into the most recent eligible stage you have configured.
- Receive any eligible notifications configured for that stage.

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New Workday Onboarding Experience, cont.

Additional considerations

Admin Experience: Onboarding Planner

The Onboarding Planner gives you a centralized hub to configure Onboarding with improve visibility. It allows you to create time-based stages aligned with the Hire Date, helping you group and deliver unique content to new hires in manageable stages, reducing overload.
The Onboarding Planner also includes reporting tools to help you monitor plan assignments to maintain oversight, and a location to configure branding for the External Preboarding site.

Report Fields

Workday deliver new report fields that you can use in condition rules and custom reports.

What do I need to do

Onboarding Plan Stage Assignment

Once you assign the plan, Workday places the new hire:

- In a stage based on the stage offset configured in the Onboarding Planner relative to the (proposed) Hire Date.
- In their most eligible stage and sends notifications for that stage. Workday also inactivates plan assignments as needed.
- A background process runs once an hour, across all plan assignments.

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New Workday Onboarding Experience, cont.

Additional considerations

Report Data Sources
Workday deliver these new Report Data Sources (RDS) that you can use to create custom reports for onboarding:

1. Onboarding Plan Assignments (secured to the Worker Data: Onboarding domain).
2. Onboarding Advisories (secured to the Set Up: Onboarding domain).

Workday Delivered Reports

1. Onboarding Plan Assignments: You can use this report to get an overview of onboarding plan assignment details for workers or pre-hires assigned the plan.
2. Onboarding Advisories: You can use this report to help you address potential issues during the onboarding process, such as any new worker or pre-hire that may be missing an onboarding plan assignment.

What do I need to do

Set Up Onboarding Planner

Access the Onboarding Planner task and configure these sections:

- Planner Section - Overview: You can use the Maintain Hubs task to personalize the landing page with:
  - Custom Reports.
  - Announcements.
  - External Links.

- Planner Section - Audiences: Access the Maintain Onboarding Plan Audiences task to assign plans to audiences and set the plan hierarchy.
  You can create Audiences using condition rules to send personalized Onboarding Plans and individualized content to groups of new starters based on set criteria. Example: Region or Job Area.

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New Workday Onboarding Experience, cont.

Additional considerations

Onboarding Plan Assignment Service Step

Workday add the new Onboarding Plan Assignment service step that you can add to these business processes to establish the starting point from which an Onboarding Plan can be made available to new hires:

1. Hire.
2. Contract Contingent Worker.
3. Employment Agreement (Recruiting customers only).
4. Offer (Recruiting customers only).

Onboarding Timeline

Workday add the Onboarding Timeline to provide new hires with a visual representation of their current stage in the onboarding process. The content dynamically updates as new hires progress through each stage based on plan configuration. If you have an active plan assignment, the Onboarding Timeline is visible on the:

What do I need to do

- Maintain Audiences: You can create Audiences that you can use at both Plan and content level for more granularity. You can create and select the rules from the Condition Rules prompt:
  - Job Application Condition Rules: Created to target new joiner access content as pre-hires through the External Preboarding site (Recruiting customer only).
  - Worker Condition Rules: Created for new joiners accessing content as Workers or contingent workers internally once they receive a Workday account.
- Plan Audience Selection: You can assign Audiences to an Onboarding Plan.

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New Workday Onboarding Experience, cont.

Additional considerations

- Workday Homepage (Access point to Onboarding Plan).
- Onboarding Plan.

Onboarding Tasks

Workday deliver these new tasks that you can use with the new onboarding experience. See attachment for full list.

Onboarding Purge

You can use the new report field Has Active Onboarding Plan Assignment (secured to the Purge Person Data domain) to purge personal identifiable information for candidates or job applications with active onboarding plan assignments. After you purge a candidate or job application, Workday inactivates the associated Plan Assignment.

What do I need to do

- Planner Section - Content Library: You can use the Create Onboarding Content task to create specific content for Onboarding Plans.
  - Onboarding Announcement: You can create an Announcement to include in an Onboarding Plan. Note: Custom Reports and Tasks will not display in External Preboarding even when configured. Worker photos will display to external users with access to the Person Data: Personal Photo domain. (Recruiting customers only)
  - Onboarding Card: You can create a Day 1 Overview Card and add it to a plan providing the new joiner with the key information they need in advance of their first day. You can include these details on the Day 1 Overview Card:

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New Workday Onboarding Experience, cont.

Additional considerations

Tenant Setup Check Box

Workday add a new Disable Onboarding Dashboard check box on the Edit Tenant Setup - HCM task.

Two of the Onboarding tasks used to access the existing Onboarding Dashboard and Onboarding Plans (from global search or homepage menu items) are conditional and impacted by the Disable Onboarding Dashboard check box.

For these two tasks, when you leave the Disable Onboarding Dashboard checkbox unselected, Workday directs users with an active Onboarding Plan Assignment to the new Onboarding Plan homepage. Users without an assignment will continue to see the existing Onboarding Dashboard.

What do I need to do

- Work Location.
- First Day Start Time.
- Orientation Location.
- Orientation Start Time.
- Instruction Overview.
- Orientation Facilitator.

- You can use Audience and Condition Rules to localize the content on the Day 1 Overview Card.

- You can also manually enter values for each field or use a dynamic External Field. You can also configure a custom object for Job Application or Worker to manage these values.

- You can also create Calculated Fields to get specific information from business objects. Example: Job Application.

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New Workday Onboarding Experience, cont.

Additional considerations

When you select the Disable Onboarding Dashboard checkbox, Workday directs all users to the new Onboarding Plan homepage.

This supports customers using the existing Onboarding Dashboard, allowing new hires with ongoing dashboard content to complete their onboarding through a single experience. The check box enables you to manage your migration to the new Onboarding Plan when you're ready for your entire onboarding population to transition to the new experience.

What do I need to do

- Create Onboarding Message: You can create a Message that will default to a Highlight when configuring an Onboarding Plan. This can be a welcome message, a message providing context on the organization or their new role.
- Create Onboarding Video: You can create a Video that you can add to the You might be interested in a slider on the Onboarding Plan or as a Highlight.
- Planner Section- Notifications: You can set up notifications for each stage to let new hires know when new content is available.
  - Access the Edit Tenant Setup-Notifications task to configure routing rules for the notifications. Enter Onboarding Notifications under HCM for Email or SMS (Workday Messaging customers only)

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New Workday Onboarding Experience, cont.

What do I need to do

- Create and publish a Notification Template for Email notifications from Drive using the Onboarding Plan Notifications category.

    - You can use Notification Templates in Notification Designer to customize Email notification with your organization's branding.
    - You can link the new hire to their Onboarding Plan using any of these report fields:
      - External Onboarding Plan URL.
      - External Onboarding Plan Day 1 Overview.
    - You can use the new report fields to personalize notifications for both email and SMS, reducing the need to create multiple notifications.
    - You can report on notifications using the Notification Events for Onboarding Plan Assignment report field.

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New Workday Onboarding Experience, cont.

What do I need to do

- Planner Section - External Branding:
  - You can use the Create/Edit External Onboarding Brand task to upload your logo and banner for consistent branding for your Onboarding Plan. Once the new hire has tenant access, they will see tenant branding, which may differ from External Branding.
- Planner Section - Reports:
  - Onboarding Business Process Status Summary: Enables you to track the summary of recently hired workers' task completion status from the onboarding business process.
  - Onboarding Plan Assignments: Enables you to get an overview on onboarding plan assignment details for any worker or pre-hire assigned the plan.
  - Onboarding Advisories: Helps you identify workers that may be missing a plan assignment.

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New Workday Onboarding Experience, cont.

What do I need to do

- Planner Section - External Branding:
    - You can use the Create/Edit External Onboarding Brand task to upload your logo and banner for consistent branding for your Onboarding Plan. Once the new hire has tenant access, they will see tenant branding, which may differ from External Branding.
- Planner Section - Reports:
    - Onboarding Business Process Status Summary: Enables you to track the summary of recently hired workers' task completion status from the onboarding business process.

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New Workday Onboarding Experience, cont.

What do I need to do

- Onboarding Plan Assignments: Enables you to get an overview on onboarding plan assignment details for any worker or pre-hire assigned the plan.
- Onboarding Advisories: Helps you identify workers that may be missing a plan assignment.

What happens if I do nothing

Users with access to the Set Up: Onboarding domain will still be able to search for and access the existing Onboarding Dashboard experience.

https://doc.workday.com/release-notes/en-us/onb/8133451.html

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New Workday Onboarding Experience

Impact analysis

Before the release	After the release
N/A	The new functionality allows you to send targeted preboarding content to candidates as soon as they receive an offer or employment agreement, bridging the gap until they receive access to Workday.

Impact description
N/A

https://doc.workday.com/release-notes/en-us/onb/8133451.html

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Setup required

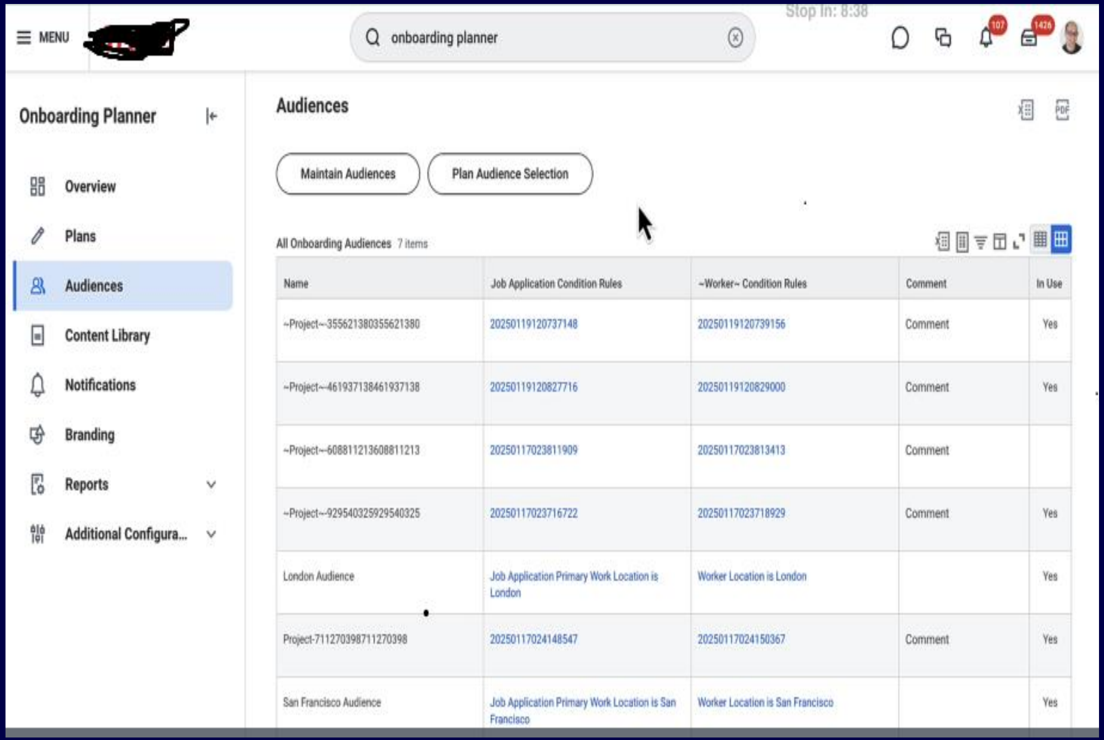
New Workday Onboarding Experience

Impact analysis

Before the release

N/A

After the release



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Enhanced Candidate Tracking for Recruiting Agency User

What's changing

With this release, Workday provides Recruiting Agency users with more efficient candidate tracking capabilities, providing them with essential information in a more accessible and organized manner.

Additional considerations

Enhanced Candidate Management for Recruiting Agency Users:

- Increases efficiency by giving agency users real-time access to candidate status updates, interview details, and key documents, reducing back-and-forth communication with recruiters and saving time for both parties.

What do I need to do

As an Administrator, follow these steps to set up your custom report:
Access the Create Custom Report task and assign a name to your new custom report.
Workday recommend setting it up as
an Advanced custom report.
Add any of these fields you require on the relevant business object:

- Job Application > Job Application Stages.
- Job Application > Job Application Steps.
- Interview Sessions > Interviewers.
- Interview Sessions > Interview Date.
- Interview Sessions > Interview Start Time.
- Interview Sessions > Interview End Time.
- Interview Sessions > Interview Type.

https://doc.workday.com/release-notes/en-us/hrrec/8362969.html

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Enhanced Candidate Tracking for Recruiting Agency User cont.

Additional considerations

- Reduces time to fill positions by providing agency users with effective tools to manage candidate information more efficiently, speeding up the recruitment process.
- Improves the candidate experience by enabling timely communication and organized interview scheduling, promoting a more positive hiring process.

Changes

Granular Status Updates

Recruiting agency users can now access more detailed status updates on their candidates' job applications.

In Japan and other countries, agency users can now view the job application stage and step in one custom report, improving efficiency by eliminating the need to contact recruiters for status updates.

What do I need to do

4. Under the Filter tab, select the recruiting agency/agencies this report is for:
   - > Recruiting Agency > In the selection list > Value specific in this filter > [Agency Names].

5. When complete, Workday recommend that you test your custom report using the Test button to ensure that all of the fields you added are populating as you expect.

https://doc.workday.com/release-notes/en-us/hrrec/8362969.html

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Enhanced Candidate Tracking for Recruiting Agency User cont.

Additional considerations

Interview Scheduling Details

Recruiting agency users can now view finalized interview scheduling details to communicate with candidates effectively.

Users in Japan and other countries can view key interview scheduling details in one report, simplifying the process of arranging interviews outside of Workday Recruiting.
You can use the new Report Fields to access these interview scheduling details:

- Interviewers.
- Start Time.
- End Time.
- Location.
- Interview Type.

What happens if I do nothing

If you are using the existing Workday-delivered Agency Job Applications report and do not want to provide enhanced tracking visibility to agency users, no action is required. The report will continue to function as it currently does, and agency users will not receive any additional tracking visibility.

https://doc.workday.com/release-notes/en-us/hrrec/8362969.html

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Setup required

Enhanced Candidate Tracking for Recruiting Agency User

Impact analysis

Before the release	After the release
N/A	Recruiting agency users can now access more detailed status updates on their candidates' job applications. Recruiting agency users can now view finalized interview scheduling details to communicate with candidates effectively You can use the new Report Fields to access these interview scheduling details: Interviewers, Start Time, End Time, Location, Interview Type.

Impact description
Increases efficiency by giving agency users real-time access to candidate status updates, interview details, and key documents, reducing back-and-forth communication with recruiters and saving time for both parties. Reduces time to fill positions by providing agency users with effective tools to manage candidate information more efficiently, speeding up the recruitment process. Improves the candidate experience by enabling timely communication and organized interview scheduling, promoting a more positive hiring process.

https://doc.workday.com/release-notes/en-us/hrrec/8362969.html

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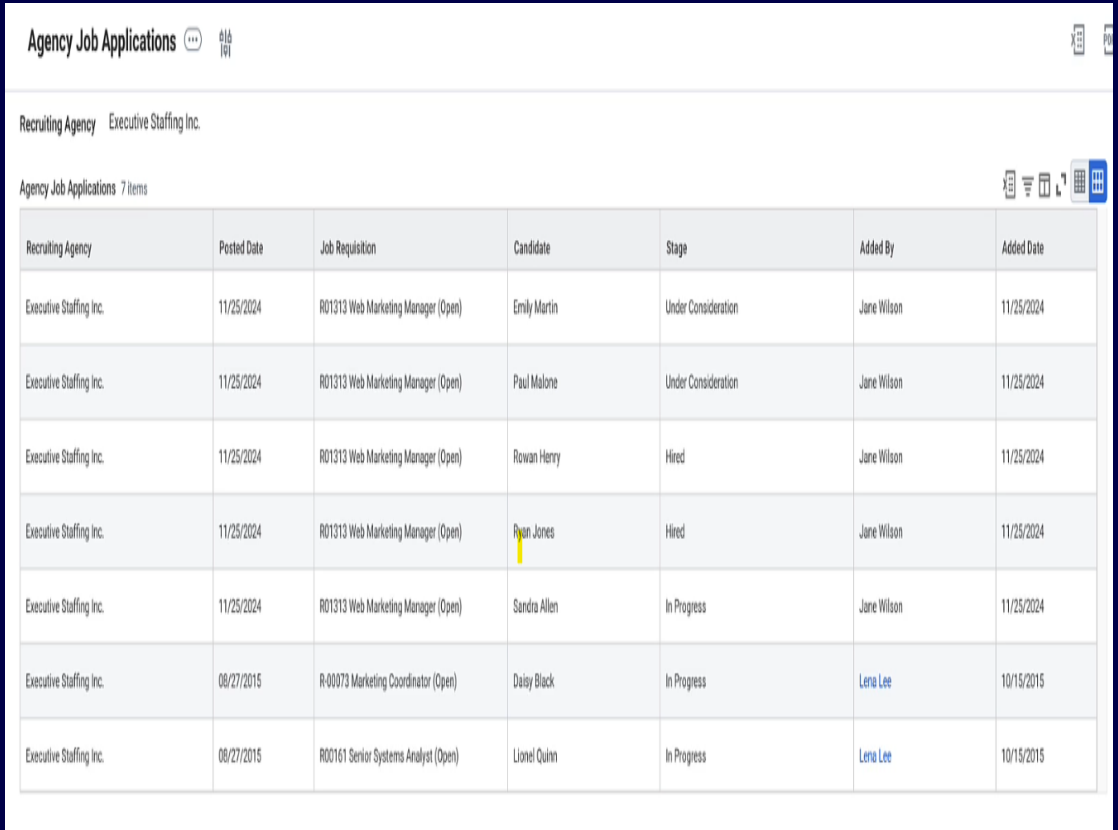
Setup required

Enhanced Candidate Tracking for Recruiting Agency User

Impact analysis

Before the release



Agency Job Applications

Recruiting Agency Executive Staffing Inc.

Agency Job Applications 7 items

Recruiting Agency	Posted Date	Job Requisition	Candidate	Stage	Added By	Added Date
Executive Staffing Inc.	11/25/2024	R01313 Web Marketing Manager (Open)	Emily Martin	Under Consideration	Jane Wilson	11/25/2024
Executive Staffing Inc.	11/25/2024	R01313 Web Marketing Manager (Open)	Paul Malone	Under Consideration	Jane Wilson	11/25/2024
Executive Staffing Inc.	11/25/2024	R01313 Web Marketing Manager (Open)	Rowan Henry	Hired	Jane Wilson	11/25/2024
Executive Staffing Inc.	11/25/2024	R01313 Web Marketing Manager (Open)	Ryan Jones	Hired	Jane Wilson	11/25/2024
Executive Staffing Inc.	11/25/2024	R01313 Web Marketing Manager (Open)	Sandra Allen	In Progress	Jane Wilson	11/25/2024
Executive Staffing Inc.	08/27/2015	R-00073 Marketing Coordinator (Open)	Daisy Black	In Progress	Lena Lee	10/15/2015
Executive Staffing Inc.	08/27/2015	R00161 Senior Systems Analyst (Open)	Lionel Quinn	In Progress	Lena Lee	10/15/2015

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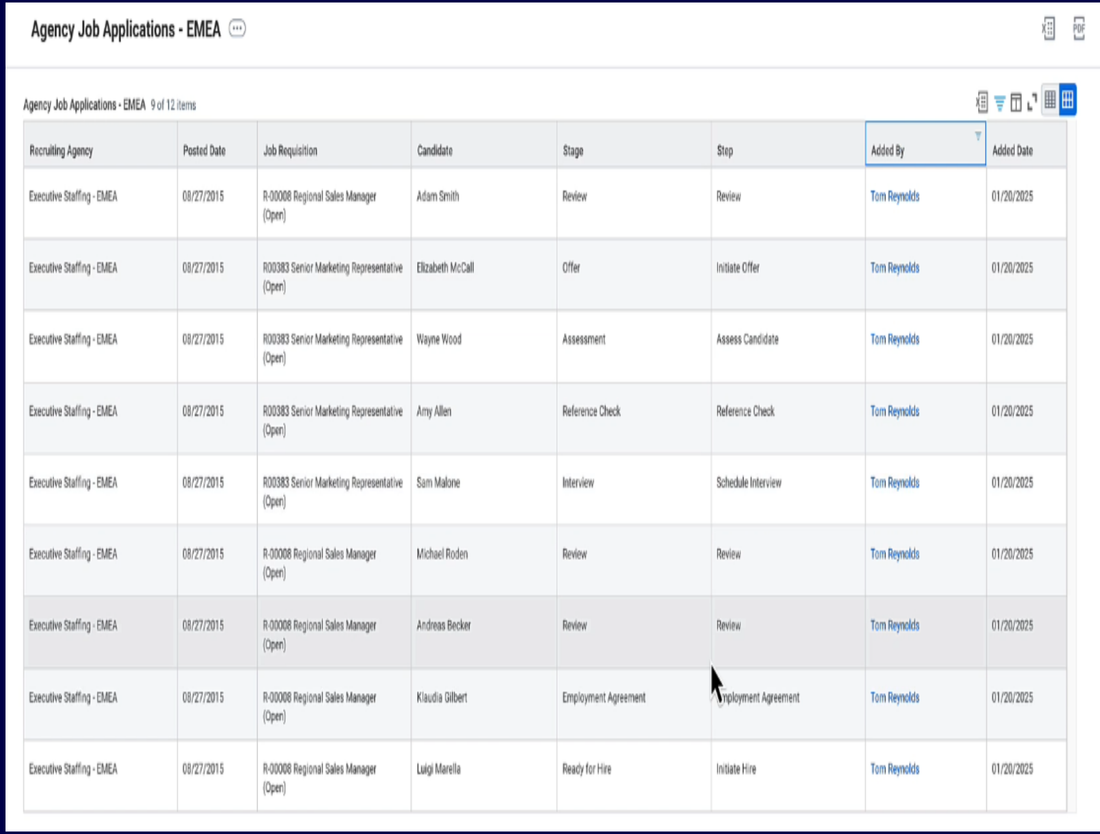
After the release



Agency Job Applications - EMEA

Agency Job Applications - EMEA 9 of 12 items

Recruiting Agency	Posted Date	Job Requisition	Candidate	Stage	Step	Added By	Added Date
Executive Staffing - EMEA	08/27/2015	R-00008 Regional Sales Manager (Open)	Adam Smith	Review	Review	Tom Reynolds	01/20/2025
Executive Staffing - EMEA	08/27/2015	R00383 Senior Marketing Representative (Open)	Elizabeth McCall	Offer	Initiate Offer	Tom Reynolds	01/20/2025
Executive Staffing - EMEA	08/27/2015	R00383 Senior Marketing Representative (Open)	Wayne Wood	Assessment	Assess Candidate	Tom Reynolds	01/20/2025
Executive Staffing - EMEA	08/27/2015	R00383 Senior Marketing Representative (Open)	Amy Allen	Reference Check	Reference Check	Tom Reynolds	01/20/2025
Executive Staffing - EMEA	08/27/2015	R00383 Senior Marketing Representative (Open)	Sam Malone	Interview	Schedule Interview	Tom Reynolds	01/20/2025
Executive Staffing - EMEA	08/27/2015	R-00008 Regional Sales Manager (Open)	Michael Roden	Review	Review	Tom Reynolds	01/20/2025
Executive Staffing - EMEA	08/27/2015	R-00008 Regional Sales Manager (Open)	Andreas Becker	Review	Review	Tom Reynolds	01/20/2025
Executive Staffing - EMEA	08/27/2015	R-00008 Regional Sales Manager (Open)	Klaudia Gilbert	Employment Agreement	Employment Agreement	Tom Reynolds	01/20/2025
Executive Staffing - EMEA	08/27/2015	R-00008 Regional Sales Manager (Open)	Luigi Marella	Ready for Hire	Initiate Hire	Tom Reynolds	01/20/2025

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Analytics and Reporting

Back to table of contents

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Add reports on dashboards

What's changing

Workday now enables you to add existing shared matrix reports on a dashboard to view it alongside related charts and sheets.

- When you share this dashboard with users, they see:
  - The data to which they have access.
  - An error message if they don't have access to the report.

Additional considerations

You can add a report with a maximum of 1 million cells to a dashboard. When viewing reports from dashboards, you can:

- Download, share, and add report or line notes.
- Drill down by available dimensions.
- Drag and resize reports.

What do I need to do

To add report on dashboards, you need these permissions assigned to you:

- Access Dashboards > Edit Dashboards.
- Access Reports.

What happens if I do nothing

Without the required permissions, you can't add reports to dashboards.

https://doc.workday.com/release-notes/en-us/plnrpt/8729577.html

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Add reports on dashboards, cont.

Additional considerations

- Copy and paste reports within and across dashboards.
- Use grid mode to expand reports and view the full toolbar.
- Enable report parameters to sync with the dashboard perspective context filters

https://doc.workday.com/release-notes/en-us/plnrpt/8729577.html

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Add reports on dashboards

Impact analysis

Before the release	After the release
User having access to run the integration pertaining to be Core Connector: Assign Organization Inbound can access the output files .	User will need additional access to view the output file . Additional access required as Worker Data: Worker ID domain .

Impact description
Ensures the user has access to Integration output files.

https://doc.workday.com/release-notes/en-us/finprj/8711083.html

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Worksheets Saved and Shared Private Filters

What's changing

You can now save the private filters you create in a workbook so that you can reuse them. You can also share filters and collaborate on customized views of data with anyone who has access to the workbook without impacting the work that others are doing.

Additional considerations

Workday adds Save As and Share options in the Related Actions menu for Private Filters. Once you save a Private Filter or convert it to a Shared Filter, you can Rename, Copy, or Delete it.

Workday adds the following options in the Filter menu:

Private Filter > Open Private Filter: Lists the Private Filters you've created.

What do I need to do

The ability to save and share private filters is available automatically.

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/uxbi/8748210.html

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Worksheets Saved and Shared Private Filters, cont.

Additional considerations

Shared Filter > Open Shared Filter: Lists the Shared Filters you've created and the filters that have been shared in the workbook by other users.

Workday also add a drop-down list in the filter banner that shows Private Filters and Shared Filters.

https://doc.workday.com/release-notes/en-us/uxbi/8748210.html

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Automatically available

Worksheets Saved and Shared Private Filters, cont.

Impact analysis

Before the release	After the release
Workday enabled user to create Private filters. But was not allowed to share them.	User has ability to create private filters and share private filters. These filters can be Renamed, copied and deleted.

Impact description
Users has ability to save and share private filters is available automatically

https://doc.workday.com/release-notes/en-us/uxbi/8748210.html

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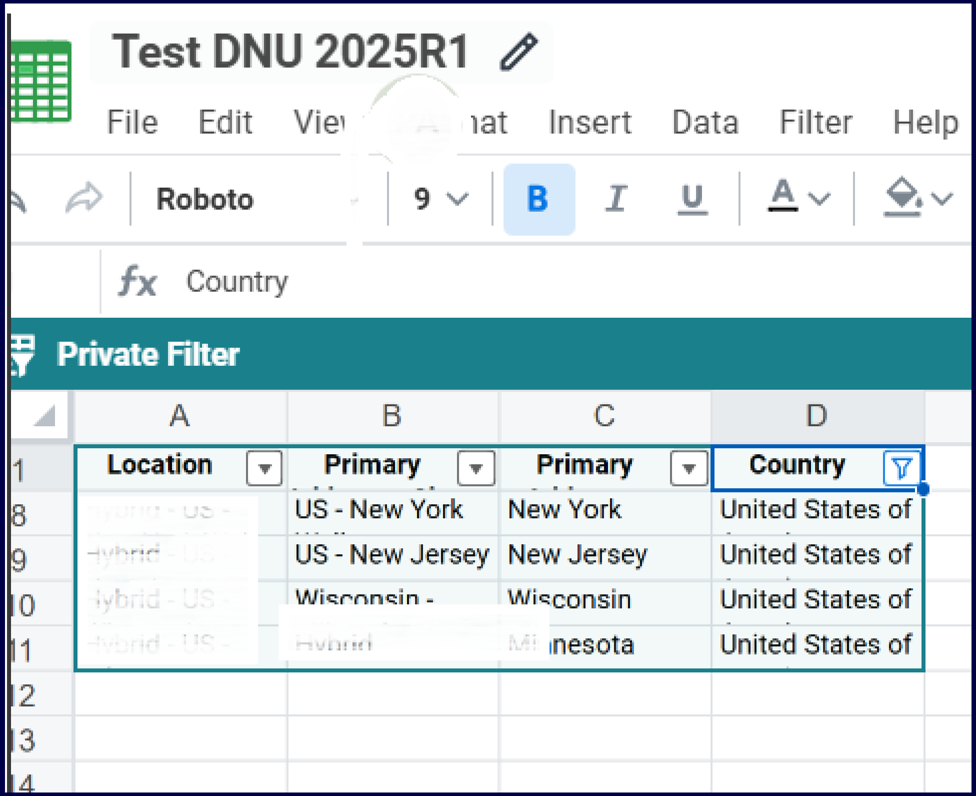
Automatically Available

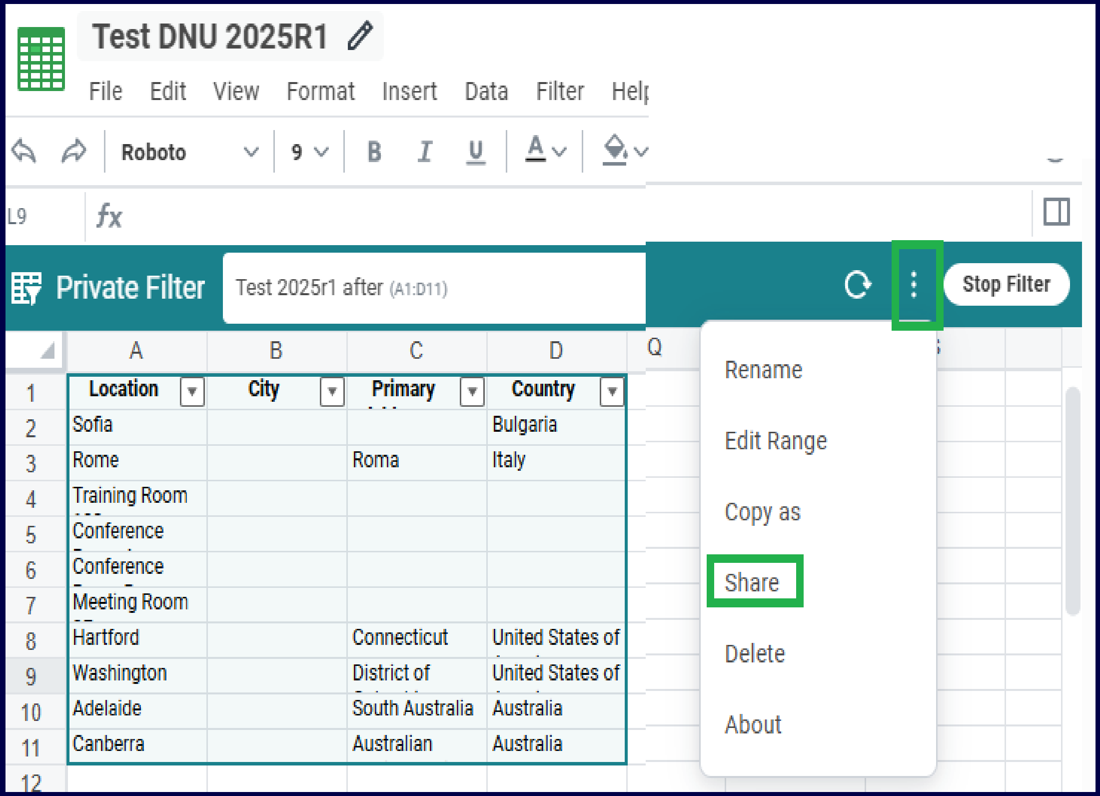
Worksheets Saved and Shared Private Filters, cont.

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/uxbi/8748210.html

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Automatically available

New Learning Report Data Source Support in Docs for Layouts

What's changing

Docs for Layouts now supports 2 new Report Data Sources (RDS) for Learning documents.

What do I need to do

N/A

Additional considerations

You can now use Docs for Layouts for advanced custom reports that use the following supported data sources:

- Learning Enrollments
- Learning Record

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/stories/7500556.html

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Automatically available

New Learning Report Data Source Support in Docs for Layouts, cont.

Impact analysis

Before the release	After the release
Learning enrollment and Learning record data sources in custom reports were not supported earlier.	Workday Document layouts supports Learning enrollment and Learning record data sources in custom reports.

Impact description
Learning Enrollment and learning Record data sources in Advanced Report are supported in Document layout

https://doc.workday.com/release-notes/en-us/contentplat/8780927.html

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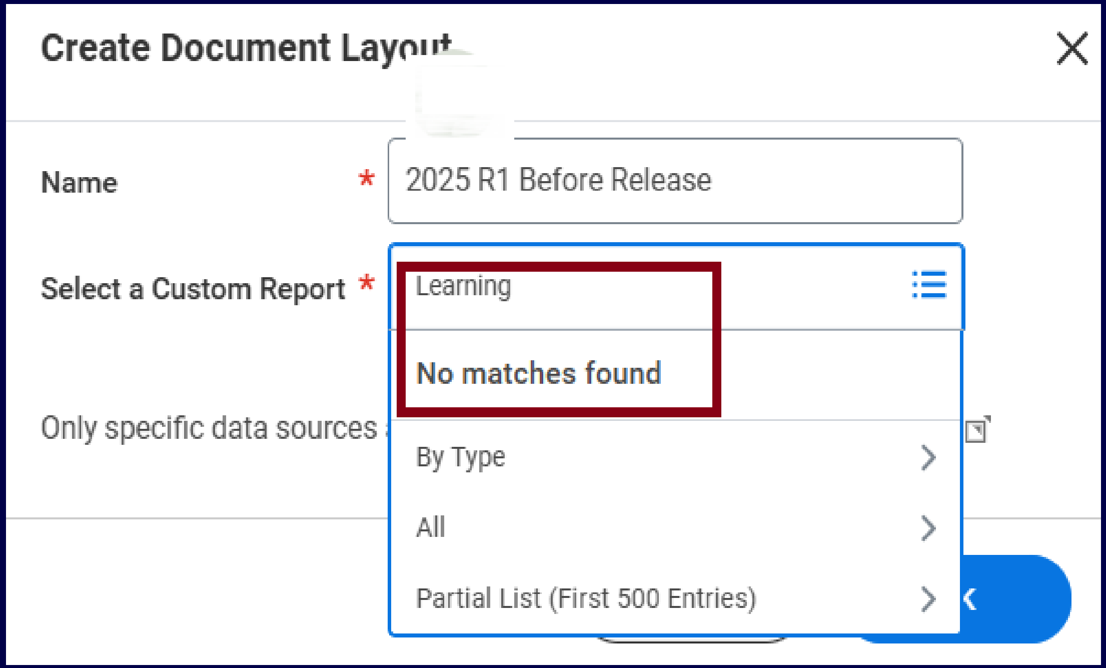
Automatically Available

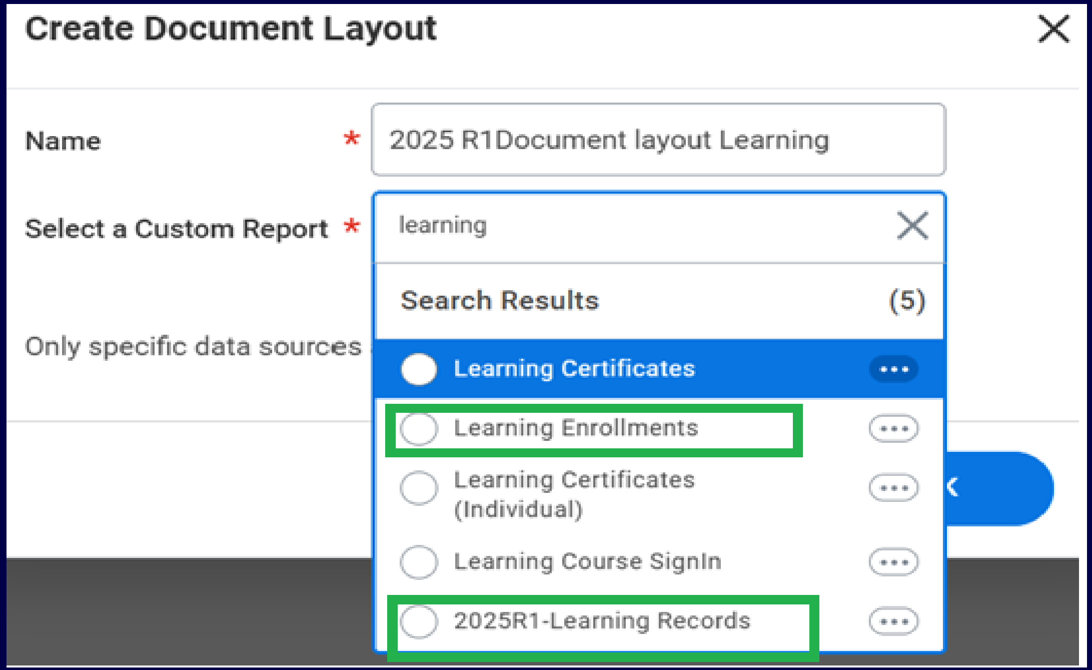
New Learning Report Data Source Support in Docs for Layouts, cont.

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/contentplat/8780927.html

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Printable Attachments for Docs for Layouts

What's changing

Workday now enable you to append image and PDF attachments to printed documents that use a document layout from Docs for Layouts.

Additional considerations

When a document is printed using a Docs for Layouts document layout Workday append:

- 1 page per image attachment in the same size as the first page in the document. GIF, JPEG, PDF, and PNG file types are supported.
- PDF attachments in their original size.
- A page at the end of the document that lists the attachments that weren't appended along with the reason.

Bulk printing of customer invoices with attachments currently only supports a batch size of 1,000 documents.

What do I need to do

N/A

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/print/8162913.html

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Custom Conditions in Docs for Layouts

What's changing

You can now create custom condition rules to control the visibility of content in a document layout.

Additional considerations

Workday adds a new Create a Condition button on the Conditions tab in the right panel of a document layout. You can use this button to open the Create Custom Condition modal and create condition rules for numeric and string data fields available from the source report. Workday also adds the ability to filter the list of condition rules on the Conditions tab by type.

What do I need to do

The ability to create custom condition rules is available automatically. Once you create a custom condition, you can apply it to content in the document layout.

What happens if I do nothing

If you choose not to create a custom condition, you can continue to use boolean data type conditions, which are automatically available from the report source associated with the document layout and display on the Conditions tab.

https://doc.workday.com/release-notes/en-us/contentplat/8092717.html

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Custom Conditions in Docs for Layouts, cont.

Impact analysis

Before the release	After the release
There was no option to create condition rule on Document layout.	Workday provides option to create condition rule for numeric and string data fields available from the source report in Document layouts

Impact description
Workday provides option to create condition rule for numeric and string data fields available from the source report in Document layouts

https://doc.workday.com/release-notes/en-us/contentplat/8092717.html

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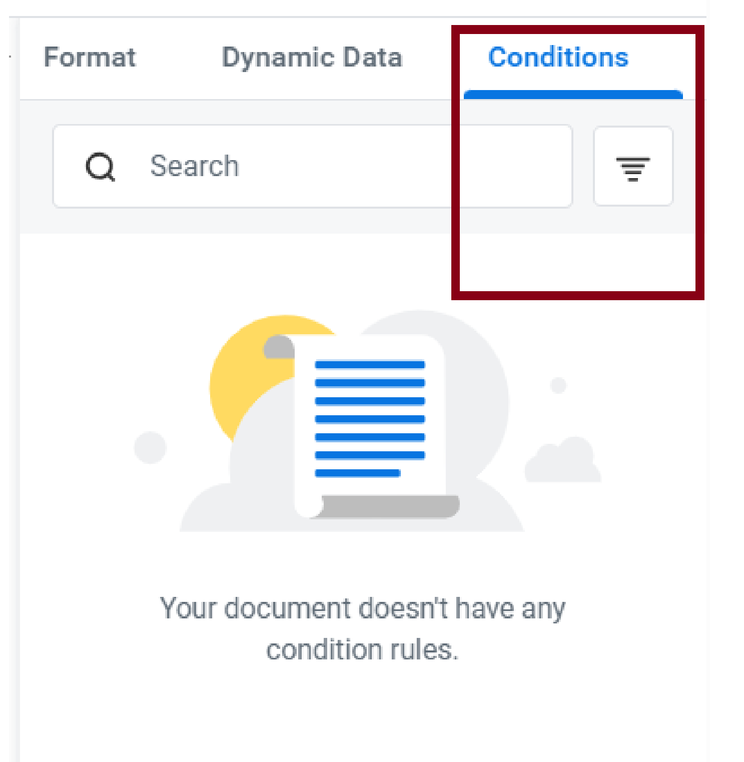
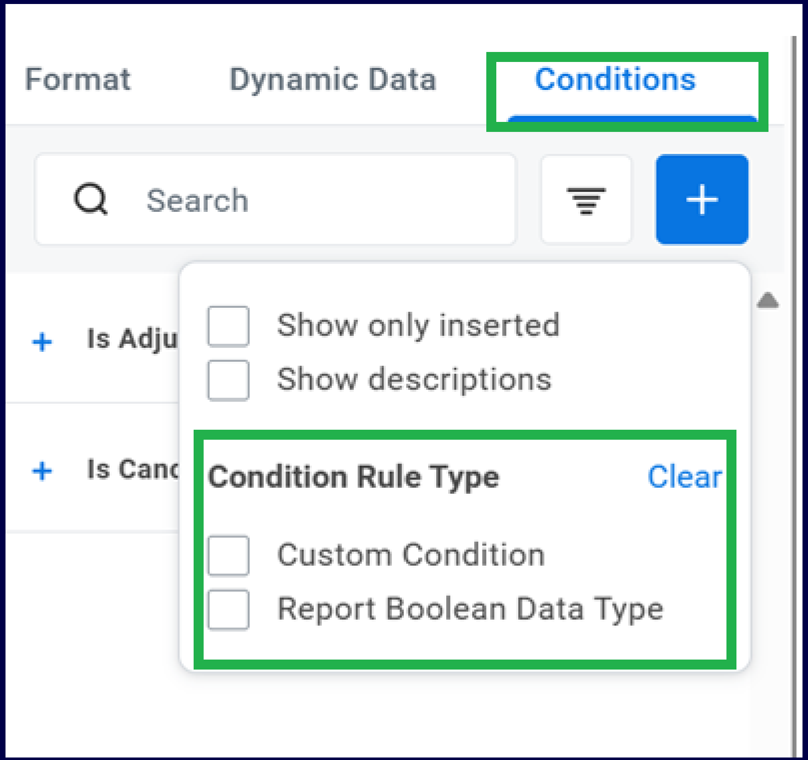
Custom Conditions in Docs for Layouts, cont.

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/contentplat/8092717.html

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New Customer Statement Report Data Source Support in Docs for Layouts

What's changing

Docs for Layouts now supports a new Report Data Source (RDS) for Customer Statement documents.

What do I need to do

N/A

Additional considerations

You can now use Docs for Layouts for advanced custom reports that use the following supported data source:

- Customers for Customer Statement Printing Run.

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/contentplat/8793134.html

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New Customer Statement Report Data Source Support in Docs for Layouts, cont.

Impact analysis

Before the release	After the release
Data source: Customers for Customer Statement Printing Run in custom report was not supported in Document layouts earlier.	Workday supports Customers for Customer Statement Printing Run data source in Custom reports for Document layouts

Impact description
Datasource: Customers for Customer Statement Printing Run in custom report is available for Document layouts

https://doc.workday.com/release-notes/en-us/contentplat/8793134.html

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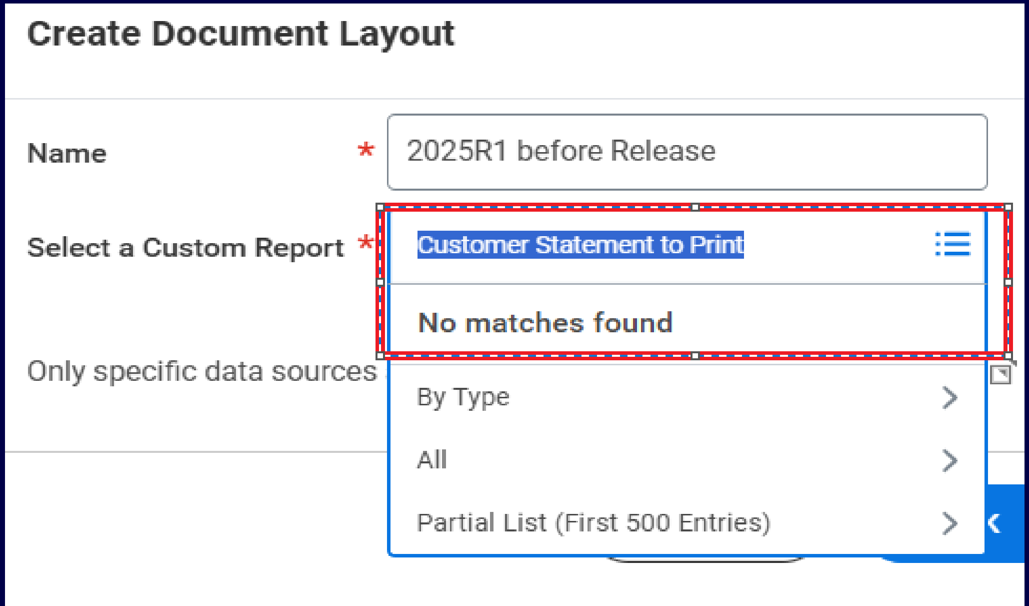
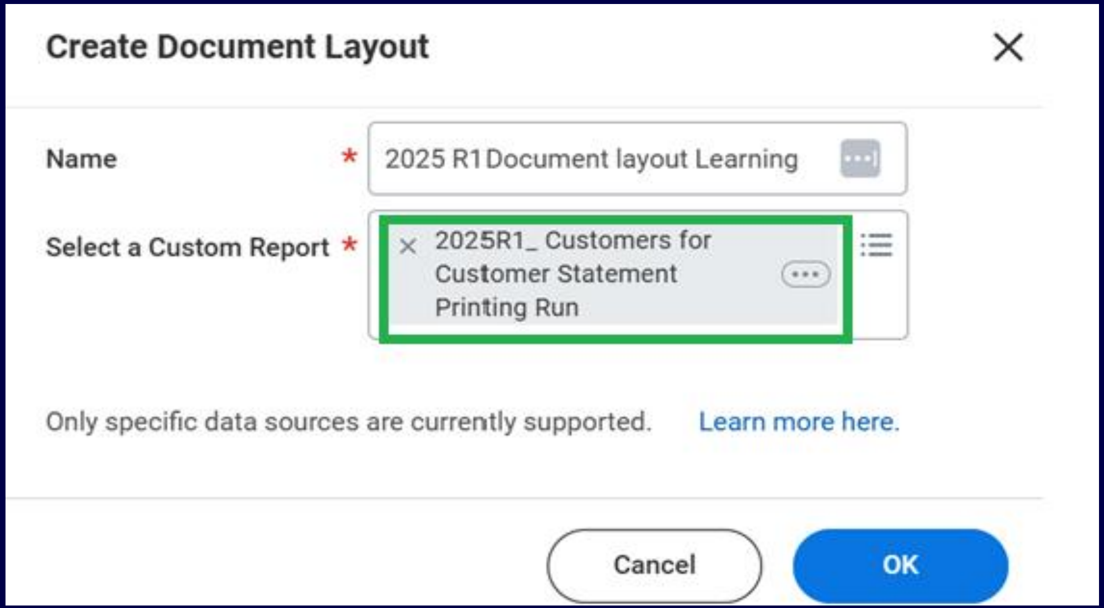
New Customer Statement Report Data Source Support in Docs for Layouts cont.

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/contentplat/8793134.html

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Mass Copy Composite Report Rows

What's changing

Workday simplifies report authoring by enabling you to mass copy composite report rows.

Additional considerations

Workday adds the new Import Rows button to the All Rows section on the Rows tab when you create or edit a composite report.

You can copy rows from composite reports that:

- Use the same control fields as the target report.
- Use the same hierarchy structures as the target report.

What do I need to do

Nothing. This feature is automatically available.

What happens if I do nothing

You will still see the new Import Rows button on your composite reports, in addition to the new Mass Copy and Replace Composite Rows task and View Mass Copy and Replace Composite Row History report.

https://doc.workday.com/release-notes/en-us/anabiui/8627984.html

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Mass Copy Composite Report Rows, cont.

Additional considerations

- Include lookup data, calculation, or empty rows. Workday excludes source reports with dynamic or combine data rows.

You can copy cell labels by selecting Include Cell Label and determine the import style of the copied rows.

- Delete and Replace clears all rows on the target report and replaces them with rows copied from the source report.
- Append adds the copied rows after the last defined row on the target report.

https://doc.workday.com/release-notes/en-us/anabiui/8627984.html

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Mass Copy Composite Report Rows, cont.

Additional considerations

Workday also delivers the new Mass Copy and Replace Composite Rows task and View Mass Copy and Replace Composite Row History report (secured to the *Custom Report Administration* domain). The task enables you to select multiple target reports as the recipient of the copied rows from a source report, following the same logic as the Import Rows button.

The report enables you to view the process history of mass copied composite reports and replaced composite rows based on the selected time period and user for audit purposes.

https://doc.workday.com/release-notes/en-us/anabiui/8627984.html

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Mass Copy Composite Report Rows, cont.

Impact analysis

Before the release	After the release
The Import rows button is not available	• The Import rows button is available, can wipe out and insert new rows, or append to existing rows. • Can also copy the labels • New Mass Copy and Replace Composite Rows task and View Mass Copy and Replace Composite Row History report

Impact description
Workday delivers this new feature automatically and is available for use except for combine data rows and dynamic data rows

https://doc.workday.com/release-notes/en-us/anabiui/8627984.html

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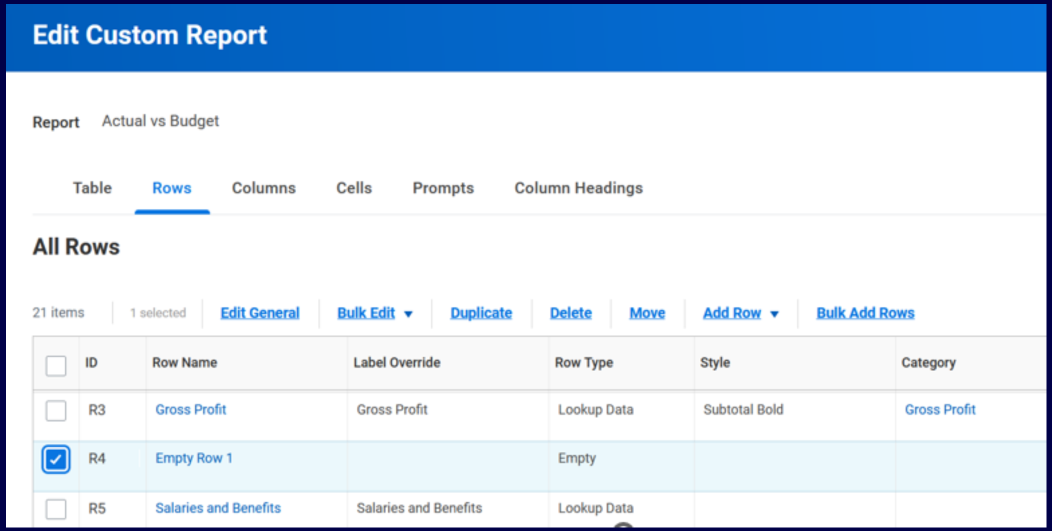
Automatically Available

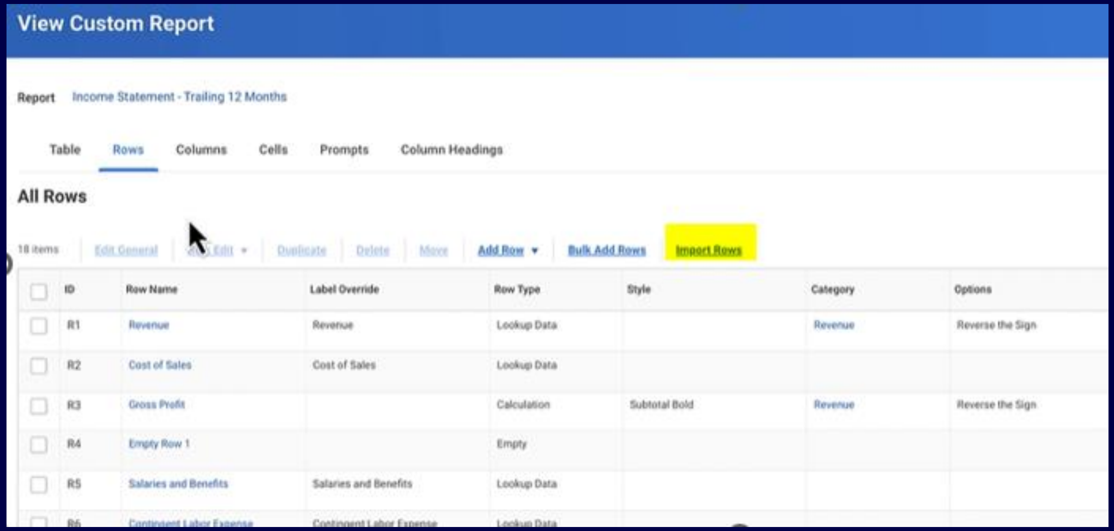
Mass Copy Composite Report Rows, cont.

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/anabiui/8627984.html

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Business Views for Reporting

What's changing

Workday improves on the Report Writer authoring experience by enabling you to use business view data sources that blend data from multiple data sources on composite reports and dashboards.

What do I need to do

Nothing. This feature is automatically available.

Additional considerations

Workday now supports business view data sources on composite reports and dashboards.

What happens if I do nothing

This feature is automatically available.

https://doc.workday.com/release-notes/en-us/anacomposite/6416701.html

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Automatically available

Business Views for Reporting, cont.

Impact analysis

Before the release	After the release
N/A	N/A

Impact description
This feature enables you to perform more robust analyses on your data by using Workday-delivered and custom reports that use business view data sources.

https://doc.workday.com/release-notes/en-us/anacomposite/6416701.html

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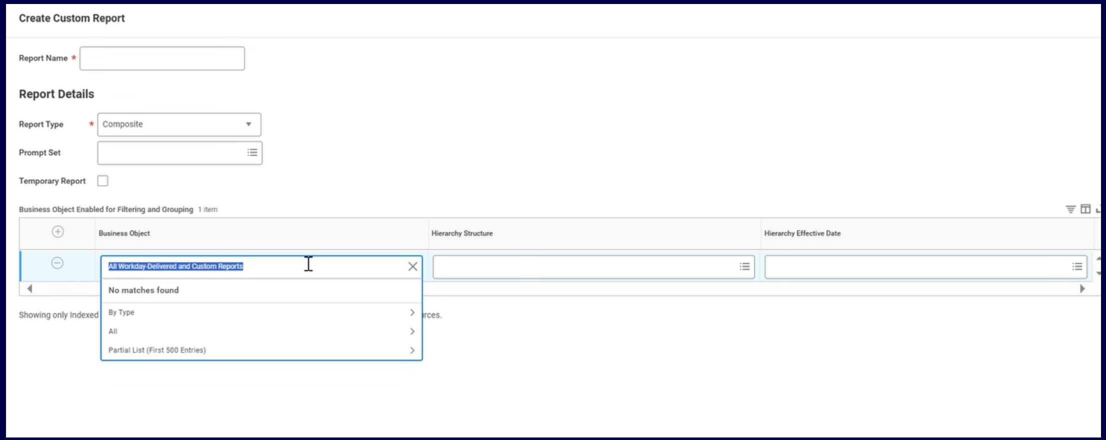
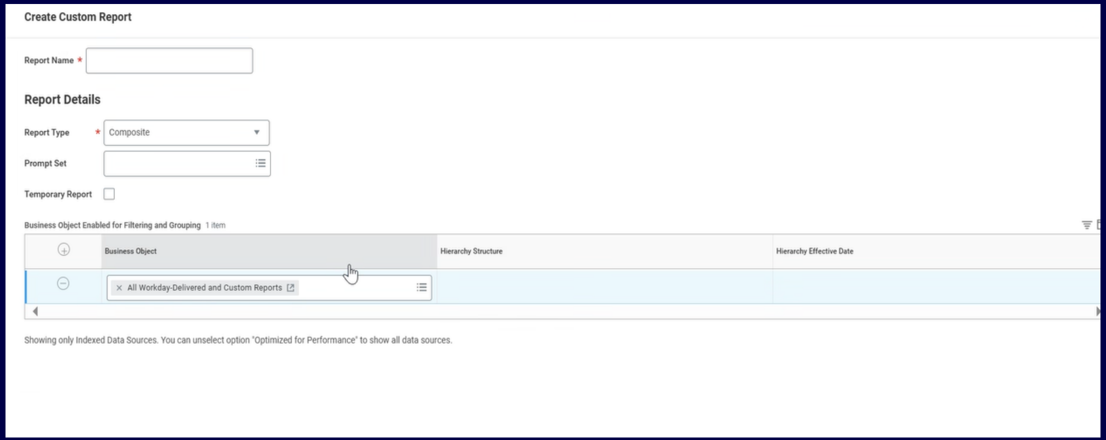
Business Views for Reporting, cont.

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/anacomposite/6416701.html

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Configurable Facet Sorting on Search Reports

What's changing

With this release, Workday gives you more control over custom search reports by enabling you to sort facet values.

Additional considerations

Workday adds the new Facet Value Sorting column in the Facet Options section on the Advanced tab for search reports when you access these tasks:

- Create Custom Report
- Edit Custom Report

This enables you to change the sort order of facet values to:

What do I need to do

Nothing. This feature is automatically available on search reports.

What happens if I do nothing

Workday still displays the new Facet Value Sorting column on custom search reports.

https://doc.workday.com/release-notes/en-us/anabi/8720058.html

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Automatically **available**

Configurable Facet Sorting on Search Reports, cont.

Additional considerations

- Alphabetical ascending.
- Alphabetical descending.
- Logical ascending, where applicable.
- Logical descending, where applicable.

You can't sort:

- Currency fields.
- Date fields.
- Numeric fields.
- Facets with more than 55 values.

For currency, date, and numeric fields, you can continue to use the Create Facet Configuration task.

https://doc.workday.com/release-notes/en-us/anabi/8720058.html

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Automatically available

Configurable Facet Sorting on Search Reports, cont.

Impact analysis

Before the release	After the release
The configuration to sort the Facet values on Search reports was not there.	New Facet Value Sorting column has been included for Custom Search reports.

Impact description
This feature overrides the default behavior on how the facet values display when running the search reports if configured.

https://doc.workday.com/release-notes/en-us/anabi/8720058.html

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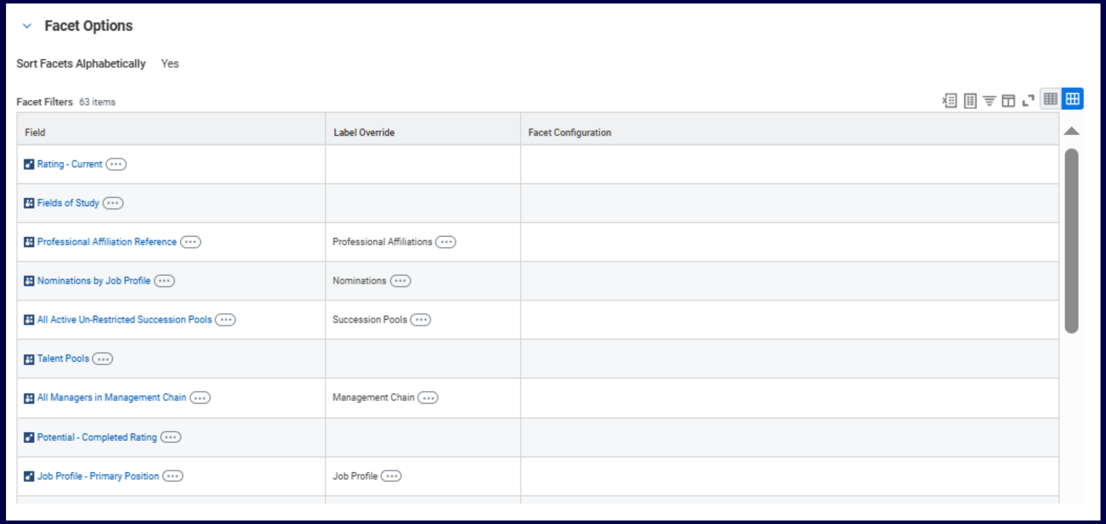
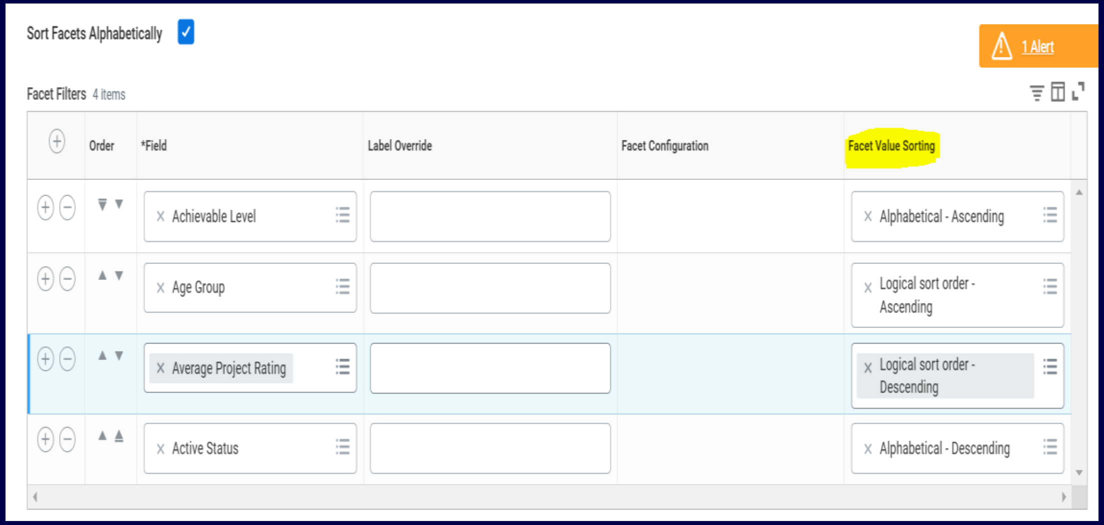
Configurable Facet Sorting on Search Reports, cont.

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/anabi/8720058.html

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Performance Enhancements on Drill-To Report Links

What's changing

Workday makes composite reports more performant by enhancing Drill-To report links.

What do I need to do

Nothing. This feature is automatically available.

Additional considerations

Workday improves performance.

What happens if I do nothing

This feature is automatically available.

https://doc.workday.com/release-notes/en-us/anacomposite/8732892.html

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Performance Enhancements on Drill-To Report Links, cont.

Impact analysis

Before the release	After the release
Composite reports with Drill-To Report links were timing out.	This feature decreases the chances of composite reports with Drill-To report links timing out.

Impact description
N/A

https://doc.workday.com/release-notes/en-us/anacomposite/8732892.html

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Access Restriction Support for Discovery Boards Download as CSV

What's changing

Workday now enforces access restrictions for discovery boards to prevent users from downloading viz data as a CSV.

Additional considerations

With this release, Discovery board users won't see the Download as CSV viz menu option when they are in a security group with an access restriction that includes either of these options in the Excludes Functionality prompt:

- Export to PDF or Excel
- Export to PDF or Excel (Except Payslips and W2s)

What do I need to do

If you want to prevent discovery board users from seeing the Download as CSV viz menu option, then create an access restriction for the users' security group using the Create Access Restriction task.

When you define the access restriction, select either of these options in the Excludes Functionality prompt:

- Export to PDF or Excel
- Export to PDF or Excel (Except Payslips and W2s)

What happens if I do nothing

Some discovery board users might lose the ability to see the Download as CSV viz menu option if they are already covered by an existing access restriction that prevents them from exporting to PDF or Excel.

https://doc.workday.com/release-notes/en-us/anadisco/8729580.html

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Automatically available

Access Restriction Support for Discovery Boards Download as CSV, cont.

Impact analysis

Before the release	After the release
All Discovery board users had access to Download as CSV menu option.	Access restriction to download PDF or Excel now applies to Discovery Boards also.

Impact description
Some discovery board users might lose the ability to see the Download as CSV viz menu option if they are already covered by an existing access restriction that prevents them from exporting to PDF or Excel.

https://doc.workday.com/release-notes/en-us/anadisco/8729580.html

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Access Restriction Support for Discovery Boards Download as CSV, cont.

Impact Analysis

Before the release

After the release

N/A

https://doc.workday.com/release-notes/en-us/anadisco/8729580.html

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Maintain Calculated Fields for Report Task

What's changing

With this release, Workday enhances the Maintain Calculated Fields for Report task by providing additional columns and options.

What do I need to do

Nothing. This feature is automatically available.

Additional considerations

Workday adds these 2 new columns on the Maintain Calculated Fields for Report task:

- Usage, which enables you to view where you use the calculated field.
- Convert, which enables you to convert a report-specific calculated field into a tenant-wide calculated field.

You can click Convert All to quickly convert all report-specific calculated fields into tenant-wide calculated fields.

What happens if I do nothing

Workday still displays the new columns on the Maintain Calculated Fields for Report task.

https://doc.workday.com/release-notes/en-us/anabi/8779202.html

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Automatically available

Maintain Calculated Fields for Report Task, cont.

Impact analysis

Before the release	After the release
N/A	More details of the report-specific calc fields

Impact description
This feature gives you more control over and greater visibility into report-specific calculated fields in your tenant.

https://doc.workday.com/release-notes/en-us/anabi/8779202.html

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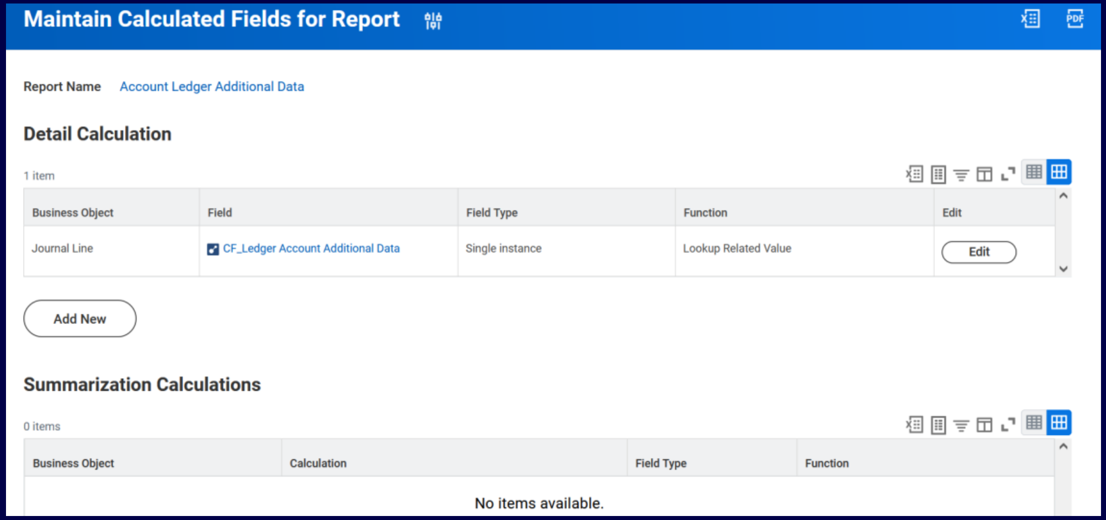
Automatically Available

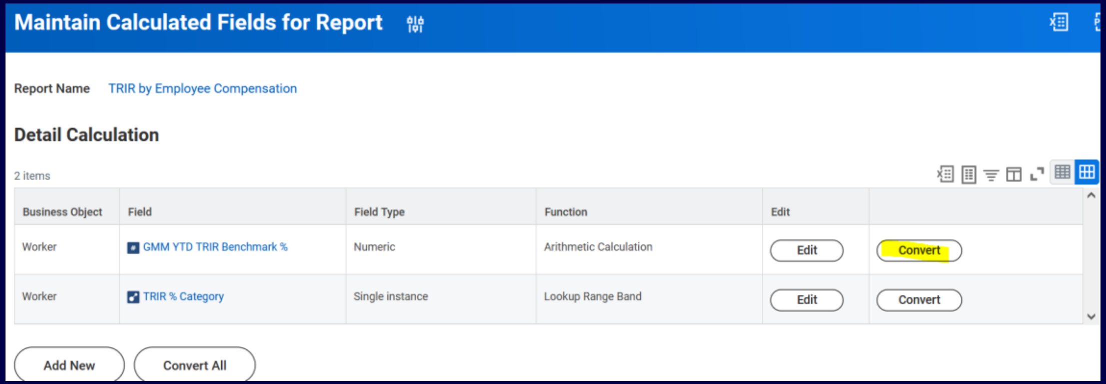
Maintain Calculated Fields for Report Task, cont.

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/anabi/8779202.html

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Highlight Viz Data in Discovery Boards

What's changing

With this release, Workday expands the data highlighting functionality in Table vizzes by enabling you to highlight Date, Text, and Boolean values based on specified conditions

What do I need to do

Nothing, but if you want to highlight Date, Text, or Boolean values in a Table viz based on a condition, then you can edit the viz using the Formatting panel.

Additional considerations

Workday updates the Formatting panel to enable discovery board editors to add conditional formatting options for Date, Text, and Boolean values at either the column level or the table level. These options are in addition to the existing functionality to add conditional formatting to number values (both Numeric and Currency fields).

What happens if I do nothing

Table viz formatting options continue to work as they did previously.

https://doc.workday.com/release-notes/en-us/anadisco/8546253.html

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Highlight Viz Data in Discovery Boards, cont.

Additional considerations

When you define a conditional format for a specific field type, Workday displays the comparison operators that apply to that field type. Example: Workday includes the Is true and Is false operators for Boolean values, and the Contains and Starts with operators for Text values.

https://doc.workday.com/release-notes/en-us/anadisco/8546253.html

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Highlight Viz Data in Discovery Boards, cont.

Impact analysis

Before the release	After the release
Conditional formatting options was available only to number values (Numeric and Currency fields).	In addition to the existing functionality, the conditional formatting options are available for Date, Text and Boolean values.

Impact description
N/A

https://doc.workday.com/release-notes/en-us/anadisco/8546253.html

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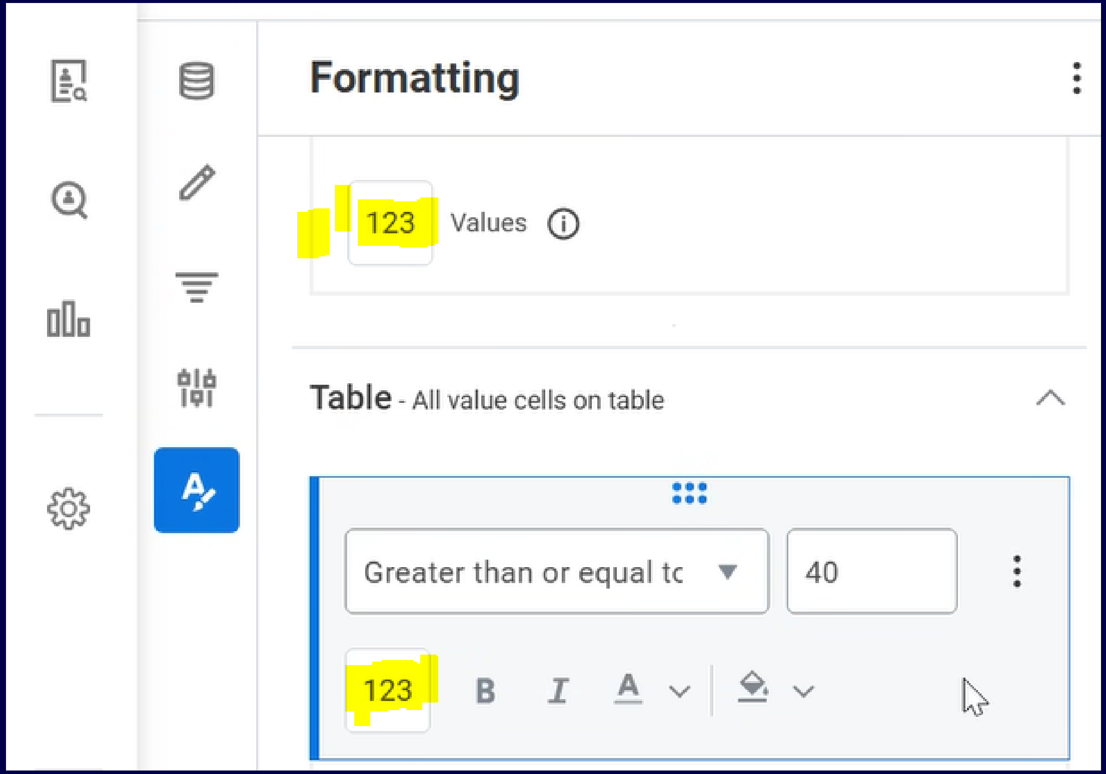
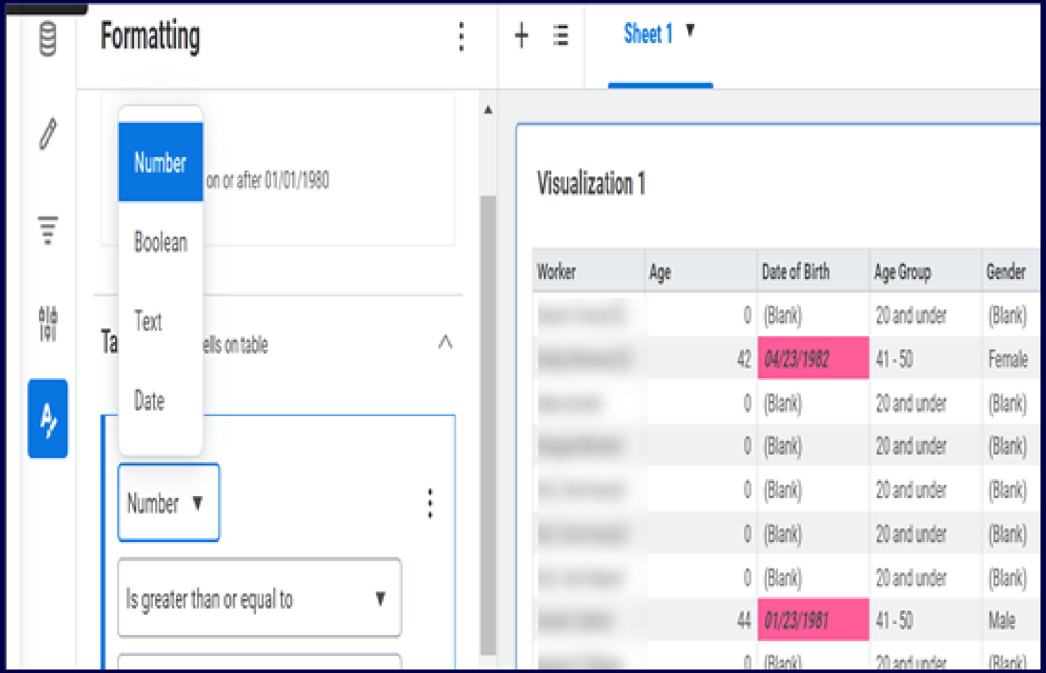
Highlight Viz Data in Discovery Boards, cont.

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/anadisco/8546253.html

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New Compensation Review Report Data Source Support in Docs for Layouts

What's changing

Docs for Layouts now supports a new Report Data Source (RDS) for Compensation Review documents.

What do I need to do

Nothing. This feature is automatically available.

Additional considerations

Workday increases the number of supported Report Data Sources in Docs for Layouts, making it possible to create document layouts for Compensation Review documents.

What happens if I do nothing

Nothing. This feature is automatically available.

https://doc.workday.com/release-notes/en-us/contentplat/8787237.html

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New Compensation Review Report Data Source Support in Docs for Layouts, cont.

Impact analysis

Before the release	After the release
Docs for Layouts did not support RDS- "Compensation Review Process Employee Adjustments – Indexed"	Docs for Layouts now supports new Report Data Source- "Compensation Review Process Employee Adjustments – Indexed"

Impact description
N/A

https://doc.workday.com/release-notes/en-us/contentplat/8787237.html

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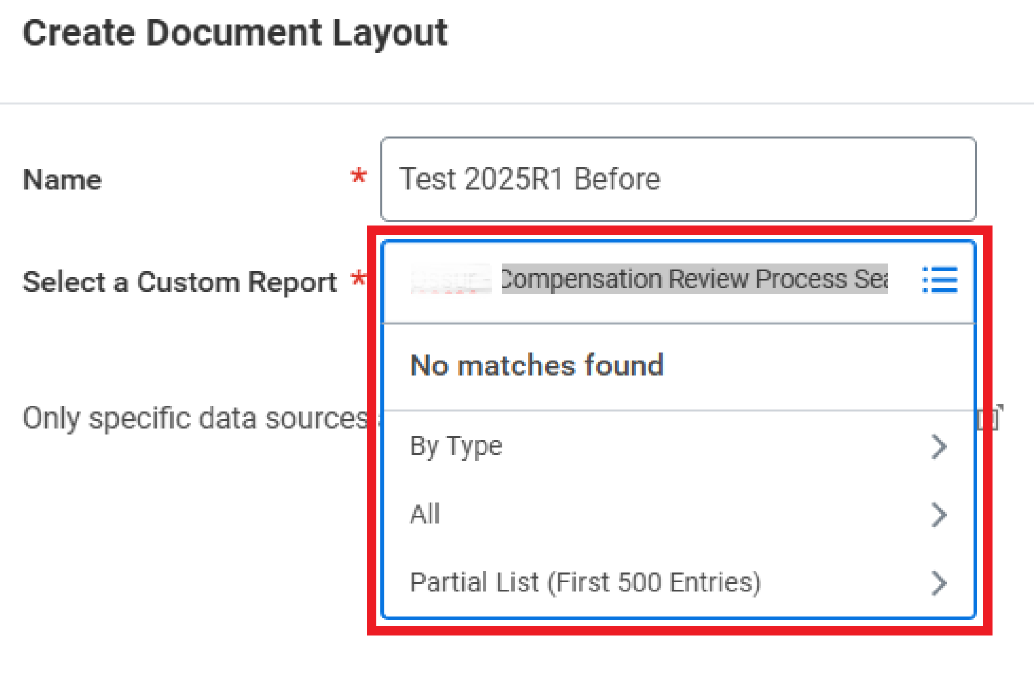
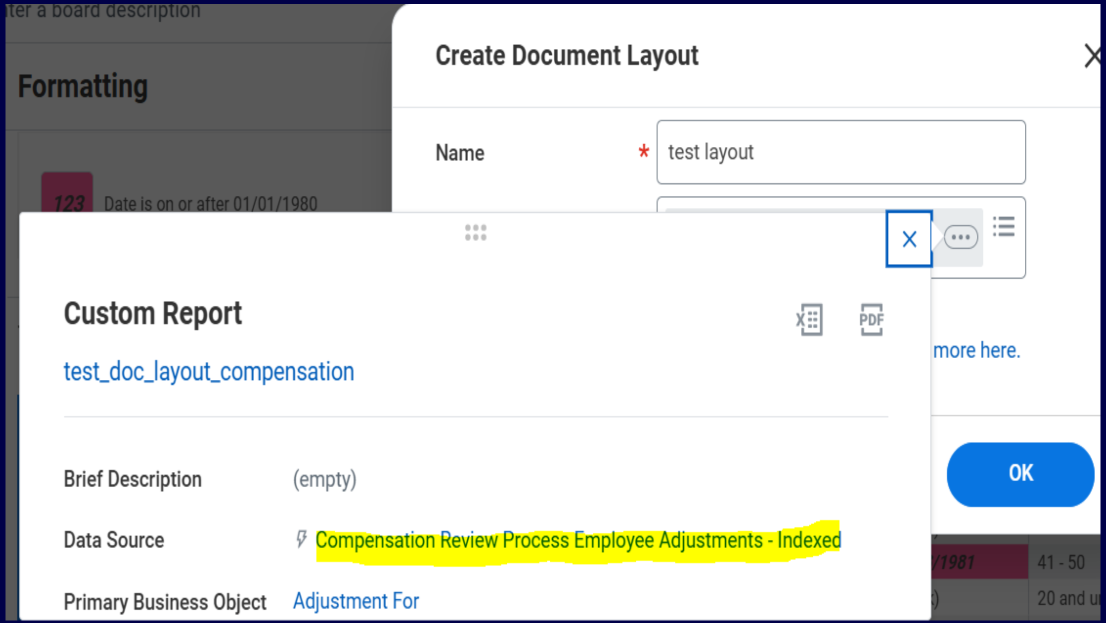
New Compensation Review Report Data Source Support in Docs for Layouts, cont.

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/contentplat/8787237.html

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Set Table Row Height in Docs for Layouts

What's changing

You can now set a fixed height for table rows in document layouts.

What do I need to do

Nothing. This feature is automatically available.

Additional considerations

Workday adds new Auto and Fixed options on the Format tab in the right panel of a document layout. When a new row is added to a table, the height of the row defaults to Auto (25 pixels). You can use Fixed to select the height (in pixels) for a row.

What happens if I do nothing

Nothing. This feature is automatically available.

https://doc.workday.com/release-notes/en-us/contentplat/8763382.html

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Automatically available

Set Table Row Height in Docs for Layouts, cont.

Impact analysis

Before the release	After the release
Fixed height could not be set for table rows in Doc Layouts.	You can now set a fixed height for table rows in document layouts.

Impact description
N/A

https://doc.workday.com/release-notes/en-us/contentplat/8763382.html

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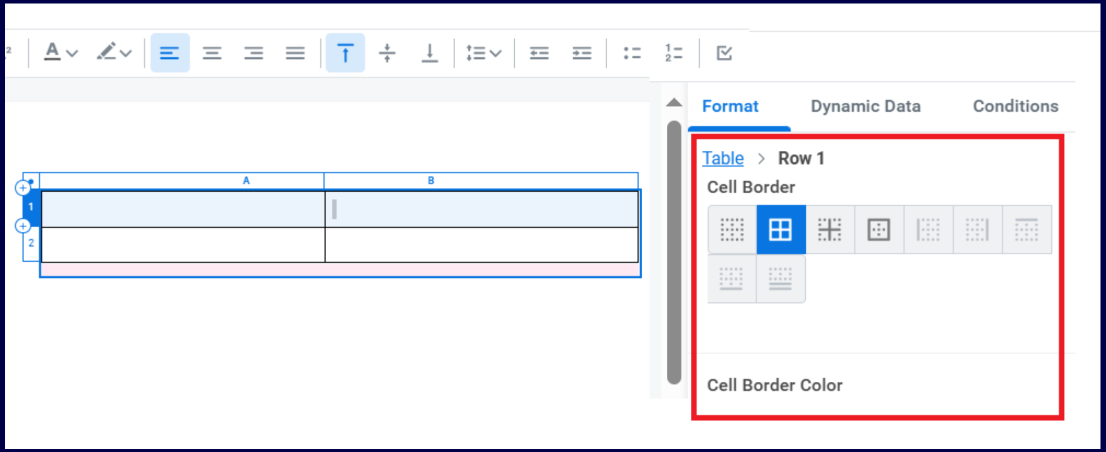
Automatically Available

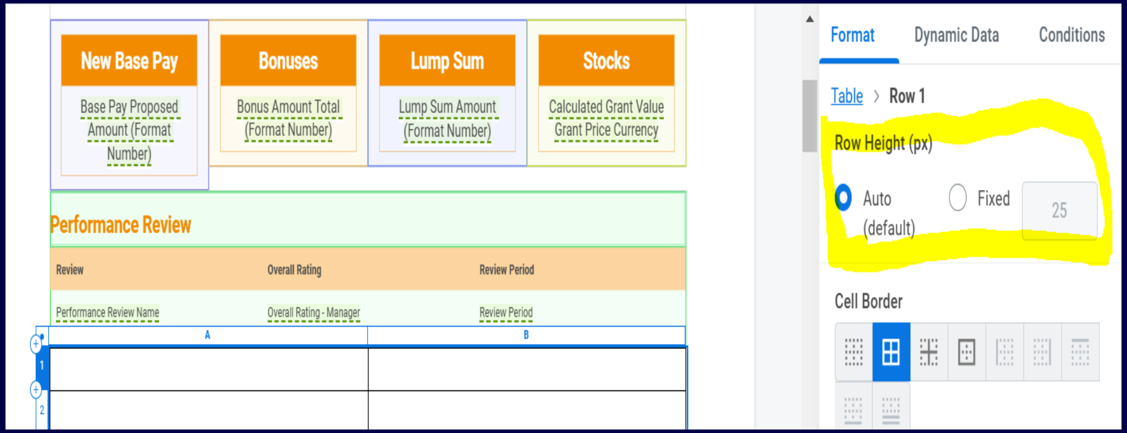
Set Table Row Height in Docs for Layouts, cont.

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/contentplat/8763382.html

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Maintain Calculated Fields Task

What's changing

With this release, Workday enhances the Maintain Calculated Fields task by providing additional columns and options.

Additional considerations

Workday adds these 2 new columns on the Maintain Calculated Fields task:

- Usage, which enables you to view where you use the calculated field.
- Convert, which enables you to convert a tenant-wide calculated field into a report-specific calculated field.

What do I need to do

Nothing. This feature is automatically available.

What happens if I do nothing

Workday still displays the new columns on the Maintain Calculated Fields task.

https://doc.workday.com/release-notes/en-us/anabi/8480220.html

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Maintain Calculated Fields Task, cont.

Additional considerations

Workday displays Convert when the calculated field has only 1 usage.

Workday doesn't display Convert when a calculated field references another calculated field:

- With many usages.
- That hasn't been converted yet.

https://doc.workday.com/release-notes/en-us/anabi/8480220.html

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Automatically available

Maintain Calculated Fields Task, cont.

Impact analysis

Before the release	After the release
N/A	More details of the tenant wide calc fields

Impact description
This feature gives you more control over and greater visibility into tenant-specific calculated fields in your tenant.

https://doc.workday.com/release-notes/en-us/anabi/8480220.html

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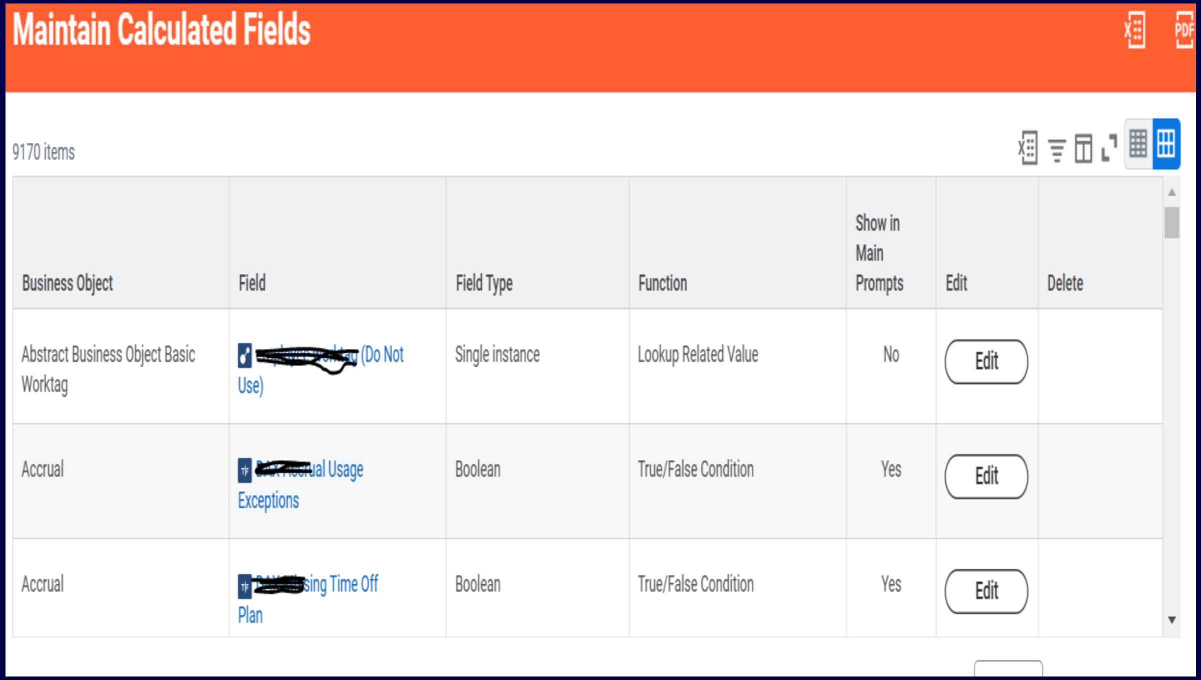
Maintain Calculated Fields Task, cont.

Impact Analysis

Before the release

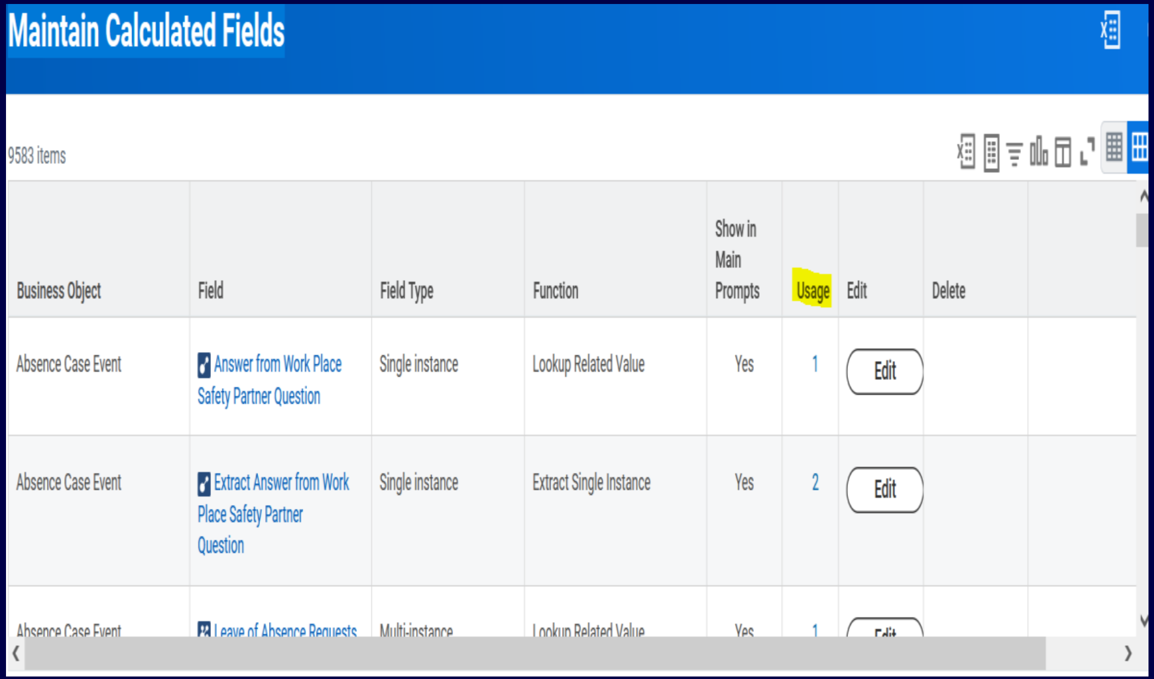


Maintain Calculated Fields

9170 items

Business Object	Field	Field Type	Function	Show in Main Prompts	Edit	Delete
Abstract Business Object Basic Worktag	[redacted] (Do Not Use)	Single instance	Lookup Related Value	No	Edit	
Accrual	[redacted]ual Usage Exceptions	Boolean	True/False Condition	Yes	Edit	
Accrual	[redacted]sing Time Off Plan	Boolean	True/False Condition	Yes	Edit	

After the release



Maintain Calculated Fields

9583 items

Business Object	Field	Field Type	Function	Show in Main Prompts	Usage	Edit	Delete
Absence Case Event	Answer from Work Place Safety Partner Question	Single instance	Lookup Related Value	Yes	1	Edit	
Absence Case Event	Extract Answer from Work Place Safety Partner Question	Single instance	Extract Single Instance	Yes	2	Edit	
Absence Case Event	Leave of Absence Requests	Multi-instance	Lookup Related Value	Yes	1	Edit	

https://doc.workday.com/release-notes/en-us/anabi/8480220.html

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Arithmetic Summarization Calculations for Advanced Reports

What's changing

With this release, Workday continues to make improvements to advanced reports by supporting arithmetic summarization calculations.

What do I need to do

Nothing. This feature is automatically available.

Additional considerations

Workday supports Workday-delivered summarization calculations for:

- Advanced reports (arithmetic only).
- Advanced and matrix subreports on composite reports.

What happens if I do nothing

This feature is automatically available.

https://doc.workday.com/release-notes/en-us/anabi/7834636.html

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Automatically available

Arithmetic Summarization Calculations for Advanced Reports, cont.

Impact analysis

Before the release	After the release
N/A	Summarization field will be available

Impact description
For easier extraction of values, you can now use advanced reports enabled as Reports-as-a-Service when they include Workday-delivered summarization calculations.

https://doc.workday.com/release-notes/en-us/anabi/7834636.html

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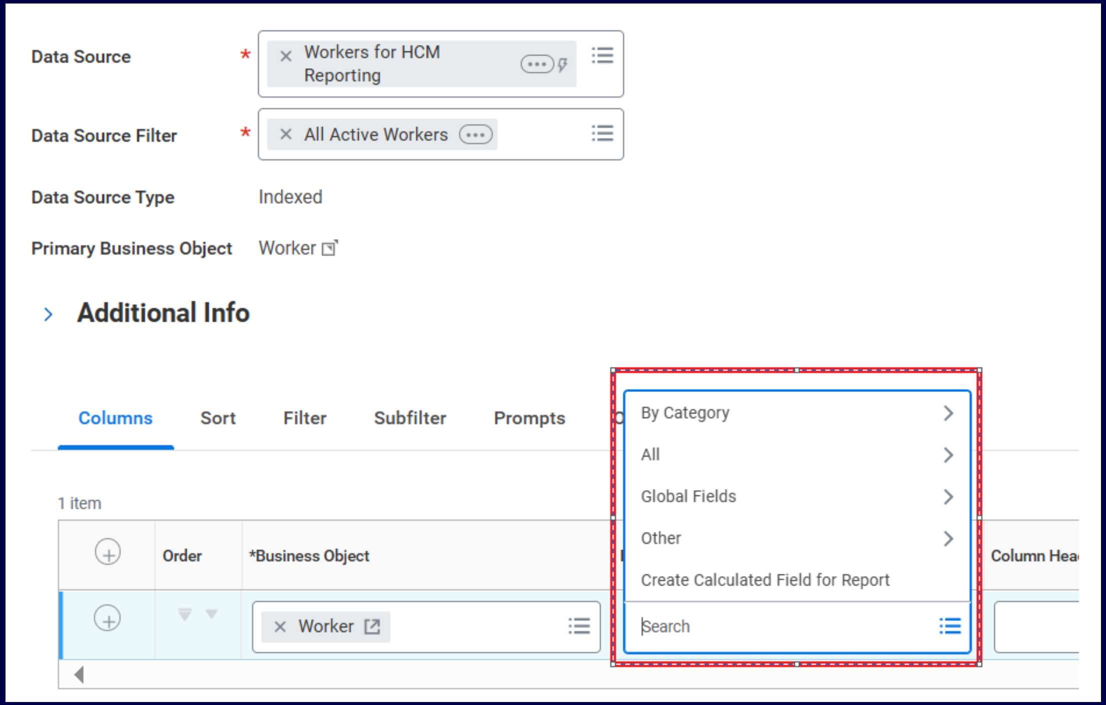
Automatically Available

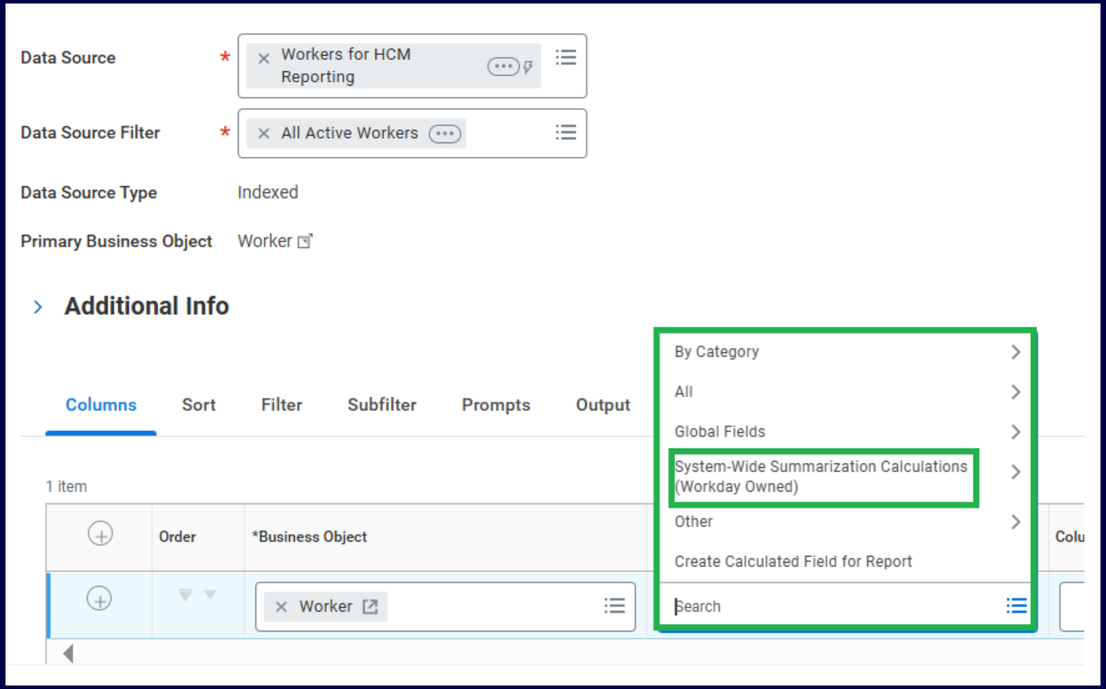
Arithmetic Summarization Calculations for Advanced Reports, cont.

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/anabi/7834636.html

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CSV Output for Advanced Reports

What's changing

Workday improves CSV outputs for advanced reports by modifying the behaviour of the Enable Preferred Currency option on the Advanced tab for currency fields.

Additional considerations

On the Create Custom Report or Edit Custom Report tasks, Workday changes the behaviour of these options on the Columns tab for currency fields on advanced reports:

- Do Not Show if Empty
- Show Currency Code Column

When you select *Do Not Show if Empty* from the Options column, Workday now hides the preferred currency column if the column is all zeroes or empty.

What do I need to do

N/A

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/anabiruntime/8729733.html

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CSV Output for Advanced Reports, cont.

Additional considerations

When you select *Show Currency Code Column* from the Options column and the original currency amount column is hidden, Workday also hides the currency code column.

When you use the Schedule a Report task or select Notify Me Later when running an advanced report, the currency field options behave accordingly in the CSV output.

https://doc.workday.com/release-notes/en-us/anabiruntime/8729733.html

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CSV Output for Advanced Reports, cont.

Impact analysis

Before the release	After the release
N/A	Better output on CSV output files

Impact description
This makes CSV outputs for advanced reports more performant and more UI-aligned.

https://doc.workday.com/release-notes/en-us/anabiruntime/8729733.html

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Smart Summary in People Analytics

What's changing

In this release, Workday introduce a feature that enables you to send monthly People Analytics content updates directly to your users' inbox.

Additional considerations

This tailor-made digest provides you a summary of your organization's data and KPIs in a bite-sized format to help your users view and act on critical information. It also contains links to People Analytics best practices and learning materials.

You can control the digest distribution service and its recipient list with the new People Analytics Email Digest Configuration task. Your users can manage their subscription in the new Email Settings form on the People Analytics report.

What do I need to do

You must set up your Tenant notifications:

Access the Edit Tenant Setup - Notifications task.

Scroll down and select Prism Analytics.

Select Analytic Application > Override Parent Notification Type Settings check box.

From the Rule prompt, select Create Notification Routing Rule.

Enter a name in the Name field.

Add Channel Frequencies.

From the Channel prompt, select All > Email.

- From the Default Frequencies prompt, select Immediately.

Click OK to save.

https://doc.workday.com/release-notes/en-us/stories/7500556.html

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Smart Summary in People Analytics, cont.

Additional considerations

Note: Your customized field mapping display names will be visible in the Smart Summary URL sent to users in your organization.

What do I need to do

To configure Email Digest Distribution Service:

- Access the People Analytics Email Digest Configuration task.

Scroll down to Email Digest Recipient List and click Edit Recipient List.

Select or deselect the Auto opt-in for new users check box.

Select or deselect the Include all users check box.

Select or deselect the Opt-In check boxes for specific users.

Click OK to save.

- Click Start Service under Email Distribution Service.
- Click Start Service to confirm starting the service.
- Click Done.

https://doc.workday.com/release-notes/en-us/stories/7500556.html

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Smart Summary in People Analytics, cont.

What do I need to do

Result:

• An introductory email is automatically sent once email distribution is started.

• The full digest will be sent after the next monthly update.

What happens if I do nothing

You won't distribute or receive the digest if you don’t go through the setup and configuration process.

https://doc.workday.com/release-notes/en-us/stories/7500556.html

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Smart Summary in People Analytics, cont.

Impact analysis

Before the release	After the release
N/A	N/A

Impact description
Setup is required to send people Analytics content to users.

https://doc.workday.com/release-notes/en-us/stories/7500556.html

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Prism Analytics

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Prism Count Distinct Performance Enhancements

What's changing

With this release, Workday improves the performance of count distinct aggregations on Prism data sources.

What do I need to do

Workday suggests refreshing your Prism data.

Additional considerations

Workday improves performance.

What happens if I do nothing

Your count distinct aggregations might not reflect the most up-to-date values.

https://doc.workday.com/release-notes/en-us/anabiruntime/8749815.html

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Support for Additional Languages in Prism Analytics

What's changing

In this release Workday added additional language support in 3 new languages.

What do I need to do

Workday will automatically make the feature available as part of the latest release and weekly refresh. Your user settings determine your system language.
Workday recommends that you log-out and login again if you change your preferred language.

Additional considerations

Workday-delivered language translations help make it easier for you to manage a global workforce.

Now support these new languages:

- French (Canada)
- Korean
- Japanese

What happens if I do nothing

If you do nothing, your configuration and chosen language do not change.

https://doc.workday.com/release-notes/en-us/prism/8738301.html

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Support for Additional Languages in Prism Analytics

Impact analysis

Before the release	After the release
Before this release translation not supported for French (Canada), Korean and Japanese language	with this release translation supported for French (Canada), Korean and Japanese language in prism

Impact description
N/A

https://doc.workday.com/release-notes/en-us/prism/8738301.html

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Prism Task URL

What's changing

With this release Workday updates our task and reports as part of an internal code refactor.

What do I need to do

If you have any of these tasks saved, you must update the URL.

Additional considerations

As part of an internal code refactor for the Delete Published Rows task, workday:

- Change the URL for the task.
- Improve the table UI for enhanced legibility.

What happens if I do nothing

Any existing links to these tasks will no longer work.

https://doc.workday.com/release-notes/en-us/prism/8753904.html

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Prism Calculated Field Expression Validation

What's changing

With this release added more validation checks for Boolean expressions in Prism calculated fields.

Additional considerations

Workday displays an error in a dataset for these invalid Boolean expressions in a Prism calculated field:

- Expressions that use the LIKE comparison operator with any of these field types or values:
    - Boolean
    - Currency
    - Double
    - Integer
    - Long
    - Numeric
- Expressions that use the IN-comparison operator with Currency fields or values.

What do I need to do

Verify that no Prism calculated field contains an invalid expression.

You can view all field errors in a dataset lineage to look for any errors that might be due to an invalid Boolean expression. Access the View Dataset Lineage report for the most downstream dataset and Select Download > Calculated Field Expressions. Open the unzipped CSV file and review the Field Error column for any errors. Fix any invalid expressions if necessary.

What happens if I do nothing

If a dataset contains an invalid Boolean expression, then any downstream dataset publish, or data change task will fail to run.

https://doc.workday.com/release-notes/en-us/prism/8732588.html

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Prism Calculated Field Expression Validation

Impact analysis

Before the release	After the release
Can’t view all field expression errors in a dataset lineage.	After the release, can view all field errors in a dataset lineage to look for any errors that might be due to an invalid Boolean expression.

Impact description
This features enables to validate prism calculated field error in dataset lineage.

https://doc.workday.com/release-notes/en-us/prism/8732588.html

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Google BigQuery Connections for Data Change Tasks

What's changing

Workday enables you to create a Google Cloud BigQuery connection that you can use in a data change task, making it easier to bring in external data from additional sources.

What do I need to do

To bring BigQuery data into Prism Analytics, create a BigQuery connection and use it in a data change task.

Additional considerations

- You can now create connections from Prism Analytics to Google Cloud BigQuery so that you can use them to load data into a table using a data change task.
- When you create a BigQuery connection, you:
- Specify a Google Cloud project ID to use for billing all data queries against.

What happens if I do nothing

No change in existing behavior. Existing data change tasks, connections, and tables continue to work as they did previously.

https://doc.workday.com/release-notes/en-us/prism/8729537.html

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Google BigQuery Connections for Data Change Tasks

Additional considerations

- Specify a Google Cloud service account key to authenticate as. You must create the service account key using JSON.
- Can optionally specify an additional service account email to impersonate that account for permissions.
- When you migrate a BigQuery connection between tenants, Workday doesn’t migrate the service account key to protect your security. As a result, you must copy and paste the JSON of the service account key in the BigQuery connection in the target tenant.
- BigQuery connections define how to connect to BigQuery, but they don’t specify what data to retrieve. Instead, when you use the connection in a data change task, you define the data to bring. You can select a table using the UI or enter a SQL SELECT statement.

https://doc.workday.com/release-notes/en-us/prism/8729537.html

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Google BigQuery Connections for Data Change Tasks

Impact analysis

Before the release	After the release
Prior to that there is no connection for BigQuery	After the release, Workday can create BigQuery connection, and this can be used in data change task for data extraction.

Impact description
This feature enables to connect external data using BigQuery connection.

https://doc.workday.com/release-notes/en-us/prism/8729537.html

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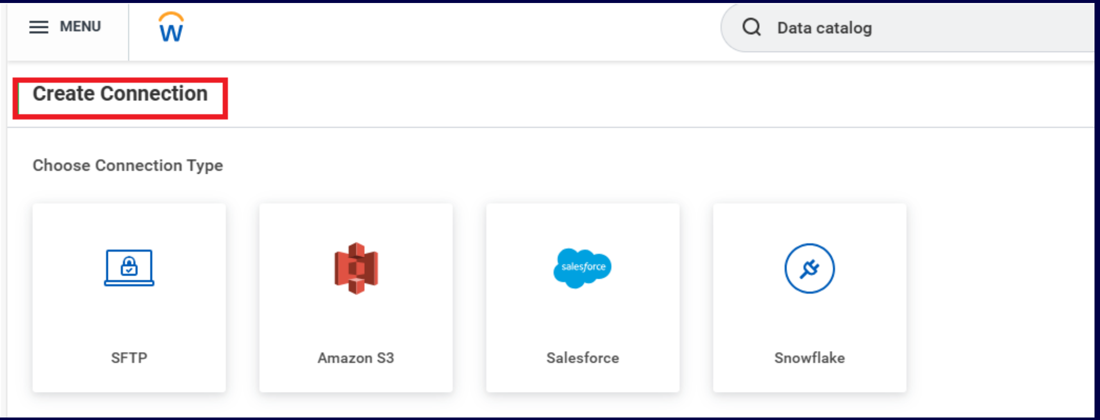
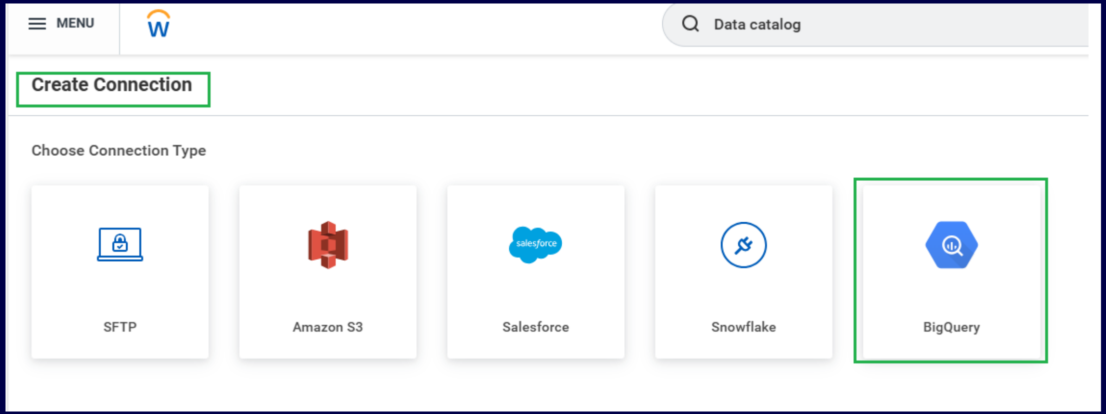
Google BigQuery Connections for Data Change Tasks

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/prism/8729537.html

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Join Stage Join Types

What’s changing

Workday continues to improve the Join Stage task by adding a new Join Type.

What do I need to do

No action is needed to use this feature.

Additional considerations

Improved the Join Stage by giving you greater flexibility in how you manipulate your data.

You can now select a Left Anti Join or Right Anti Join as a join type in a Join Stage, enabling you to quickly return only the values that do not match.

What happens if I do nothing

No change

https://doc.workday.com/release-notes/en-us/prism/8733019.html

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Join Stage Join Types

Impact analysis

Before the release	After the release
Before that there are only 4 join types (Inner, left outer, right outer, and full outer joins)	After the release addition to 4 join types, two new joins types included (Left anti, and Right anti joins)

Impact description
This feature enables to get anti rows of data from both joins.

https://doc.workday.com/release-notes/en-us/prism/8733019.html

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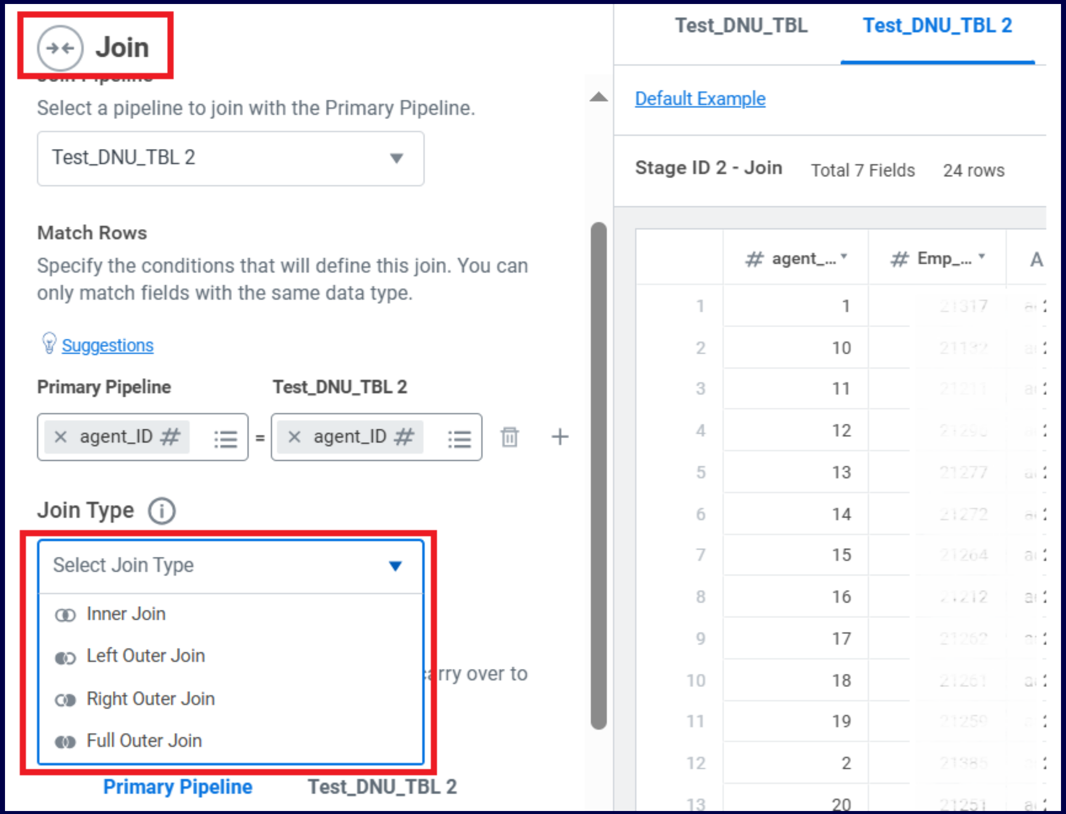
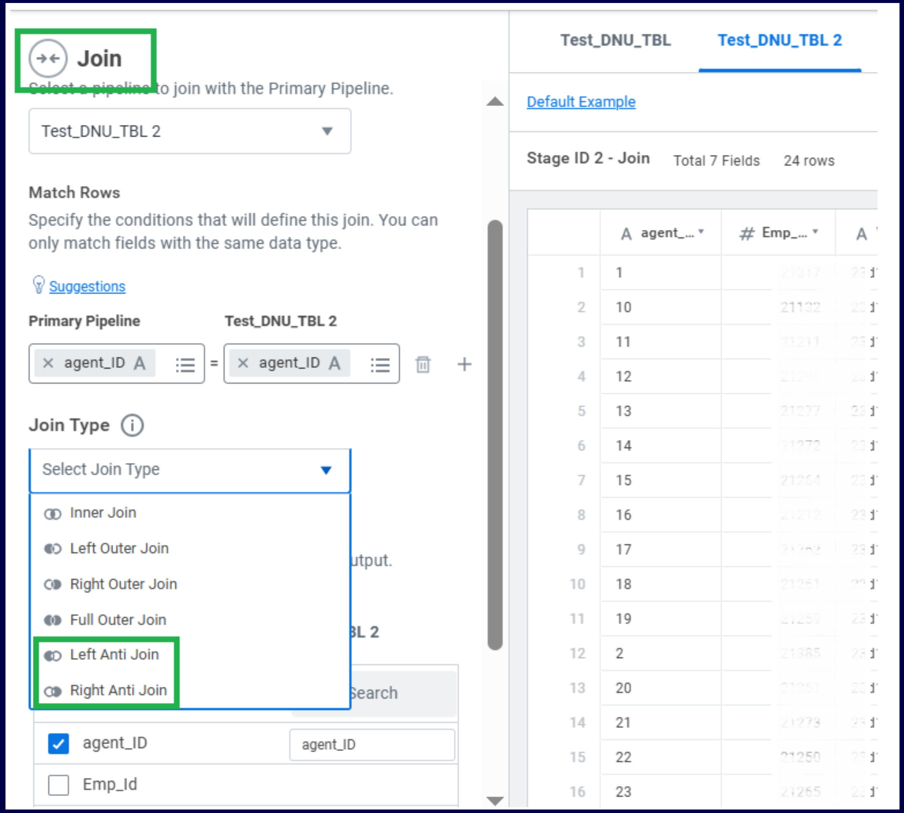
Join Stage Join Types

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/prism/8733019.html

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Automatic Rerun for Failed Data Change Tasks

What's changing

Workday now automatically tries to rerun data change tasks up to 3 times if they encounter certain errors.

Additional considerations

If a data change task encounters an error related to service unavailability, Workday now automatically attempts to rerun in 5 minutes, up to 3 times.

What do I need to do

No action is needed to use this feature.

What happens if I do nothing

No change

https://doc.workday.com/release-notes/en-us/prism/8523632.html

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Automatically available

Automatic Rerun for Failed Data Change Tasks

Impact analysis

Before the release	After the release
Before that manual intervention is needed for rerunning the failed data change task	With this release Workday attempt to rerun a data change task that was stopped by service unavailability. Workday will attempt every 5 minutes, up to 3 times, saving you the need for manual intervention.

Impact description
With this new feature failed data change task will now automatically tries to rerun up to 3 times.

https://doc.workday.com/release-notes/en-us/prism/8523632.html

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Analytic Dimensions for Prism Analytics

What's changing

You can bring in external dimensional data and store it in Prism Analytics as user-defined instance data.

With this release, Workday provides several tasks, a new type of business object, and a new dataset stage type that when combined together, enable you to convert a Text field to an Instance field in a Prism dataset.

What do I need to do

To convert a Prism dataset Text field to an Instance field:

Use the Create Analytic Dimension Business Object task to create an analytic dimension business object and decide if it will allow hierarchies.

Use the Maintain Analytic Dimension Values task to define the values in the business object.

Use the Create Analytic Dimension Hierarchy task to define the hierarchies in the business object if it allows hierarchies. Make sure that you include every dimension value in a hierarchy.

Access the Edit Dataset Transformations task for a dataset that contains the Text field and add an Instance Mapping stage. Use the analytic dimension business object you created.

https://doc.workday.com/release-notes/en-us/prism/8759473.html

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Analytic Dimensions for Prism Analytics, cont.

Additional considerations

Analytic Dimension Business Objects

Workday introduces a new type of business object that you can create and edit called an analytic dimension business object. You can create analytic dimension business objects to store external dimension data in Workday as instance data.

you can bring in external dimensional data and store it in Prism Analytics as user-defined instance data.

With this release, Workday provides several tasks, a new type of business object, and a new dataset stage type that when combined together, enable you to convert a Text field to an Instance field in a Prism dataset.

What happens if I do nothing

Nothing happens. Data in Prism datasets and tables continue to function as they do currently.

https://doc.workday.com/release-notes/en-us/prism/8759473.html

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Analytic Dimensions for Prism Analytics

Impact analysis

Before the release	After the release
There is no option to convert text to instance field and there is no stage for instance mapping in data transformation.	Workday provide several tasks, a new type of business object, and a new dataset stage type that when combined, enable you to convert a Text field to an Instance field in a Prism dataset.

Impact description
To add or view an Instance Mapping stage, you must have View permission on the Prism: Manage Analytic Dimensions domain.

https://doc.workday.com/release-notes/en-us/prism/8759473.html

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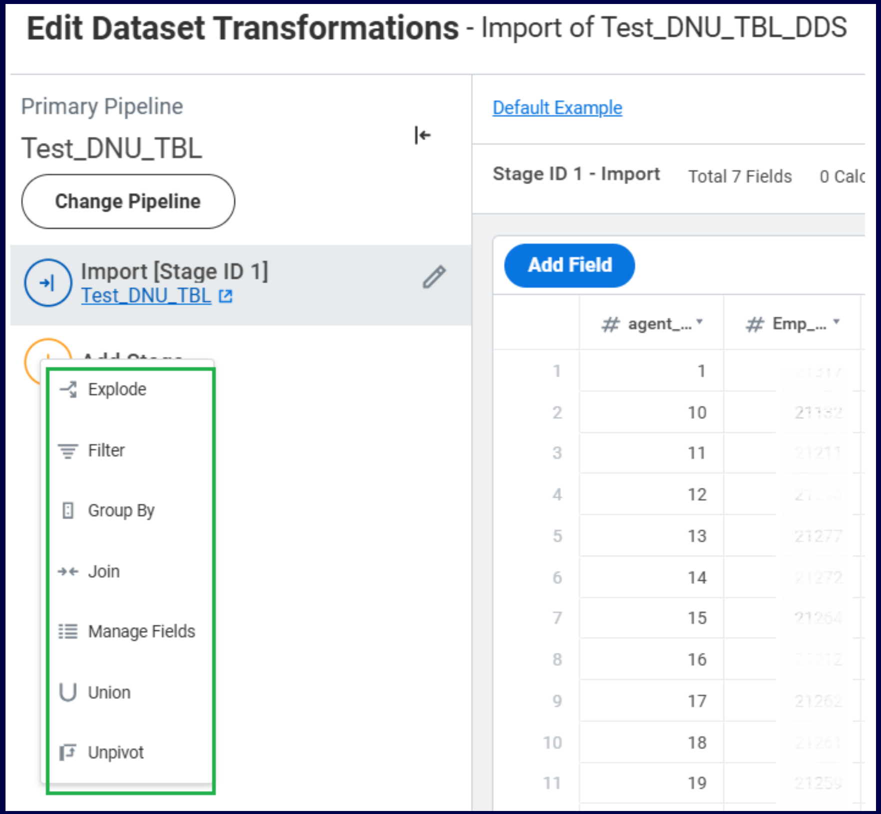
Setup Based

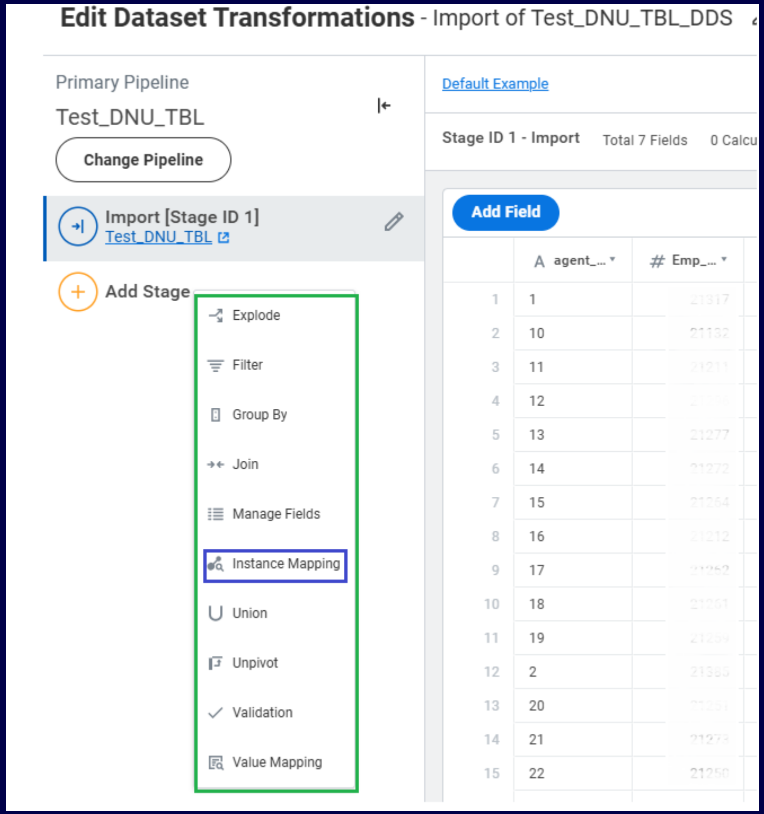
Analytic Dimensions for Prism Analytics

Impact Analysis

Before the release



After the release



https://doc.workday.com/release-notes/en-us/prism/8759473.html

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Supplier Accounts

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Historical Match Exception CRFs for Supplier Invoices

What's changing

With this release, Workday stores and displays additional information for match exceptions that helps to improve reporting on match exceptions for supplier invoices.

Additional considerations

Workday delivers these new match exception CRFs (class report fields) to store and display additional information about match exceptions:

- All Previous Match Exception Reasons.
- Matching Triggered By.
- Previous Header Match Exception Reasons.
- Previous Line Match Exception Reasons.
- Supplier Accounts Match Process Events.

What do I need to do

You don't need to do anything to uptake this feature; the new CRFs are automatically available to you in Workday reports. Setup is only required when you want to use the CRFs in your own custom reports.

What happens if I do nothing

If you do nothing, you can still use the new CRFs in Workday reports. If you want to use the CRFs in your own custom reports, you need to set up the reports.

https://doc.workday.com/release-notes/en-us/finsa/8641568.html

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Historical Match Exception CRFs for Supplier Invoices, cont.

Additional considerations

Workday also updates the names and descriptions of these three matches exception CRFs:

- All Match Exception Reasons is now named All Current Match Exception Reasons.
- Header Match Exception Reasons is now named Current Header Match Exception Reasons.
- Line Match Exception Reasons is now named Current Line Match Exception Reasons.

https://doc.workday.com/release-notes/en-us/finsa/8641568.html

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Historical Match Exception CRFs for Supplier Invoices

Impact analysis

Before the release	After the release
Before the release, these fields does not exist.	After the release, Workday delivers these new match exception CRFs (class report fields) to store and display additional information about match exceptions.

Impact description
You don't need to do anything to uptake this feature; the new CRFs are automatically available to you in Workday reports. Setup is only required when you want to use the CRFs in your own custom reports.

https://doc.workday.com/release-notes/en-us/finsa/8641568.html

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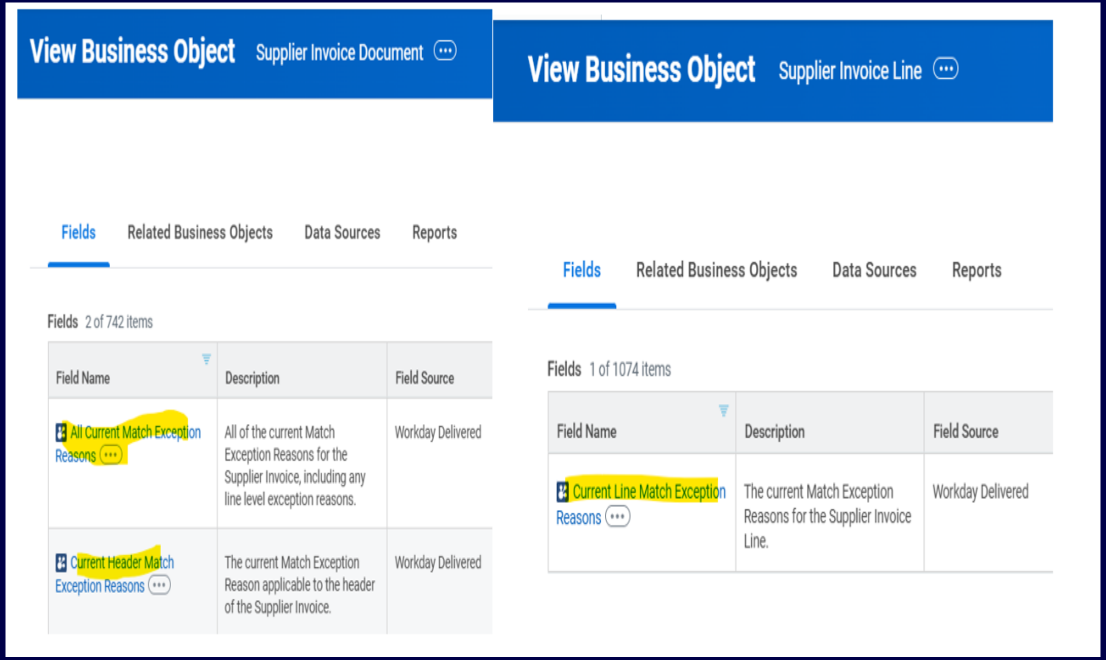
Historical Match Exception CRFs for Supplier Invoices

Impact analysis

Before the release

N/A

After the release



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Supplier Invoice Work Area Improvements

What's changing

Workday delivers various enhancements to the Supplier Invoice Work Area that improve usability of columns, search criteria, button appearance, and labeling.

Additional considerations

Workday delivers various enhancements to the Supplier Invoice Work Area that improve usability of columns, search criteria, button appearance, and labeling, among others. Workday make these usability improvements to these supplier accounts tasks in the Supplier Invoice Work Area:

- The Edit button is no longer cut off on the Purchase Order Override task.
- Workday add fields to make purchase order line mapping easier.

What do I need to do

You don't need to do anything to uptake these changes. These usability improvements to Supplier Accounts are automatically available.

What happens if I do nothing

You are still able to use these enhancements even if you do nothing.

https://doc.workday.com/release-notes/en-us/finsa/8736574.html

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Supplier Invoice Work Area Improvements, cont.

Additional Considerations

- Workday add a due date to the Edit Supplier Invoice and Create Supplier Invoice tasks.
- You can now save for later without a spend category or item on the Create Adjustment Supplier Invoice and Edit Supplier Invoice Adjustment tasks.
- Workday add a Liability label to the Increase Liability and Decrease Liability selections on the Create Adjustment Supplier Invoice and Edit Supplier Invoice Adjustment tasks. Previously there was no Liability label, only the radio buttons.
- Text and sections are more responsive to resizing application windows.
- Workday improve spacing on Work Queue Information to make it easier for you to read.

https://doc.workday.com/release-notes/en-us/finsa/8736574.html

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Supplier Invoice Work Area Improvements

Impact analysis

Before the release	After the release
Before the release, there was no specific improvements to Supplier Invoice Work Area	After the release, the usability and legibility enhancements enable you to work more efficiently when you open, edit, create, save, and submit supplier invoices and supplier invoice adjustments, among other tasks.

Impact description
These usability improvements to Supplier Accounts are automatically available.

https://doc.workday.com/release-notes/en-us/finsa/8736574.html

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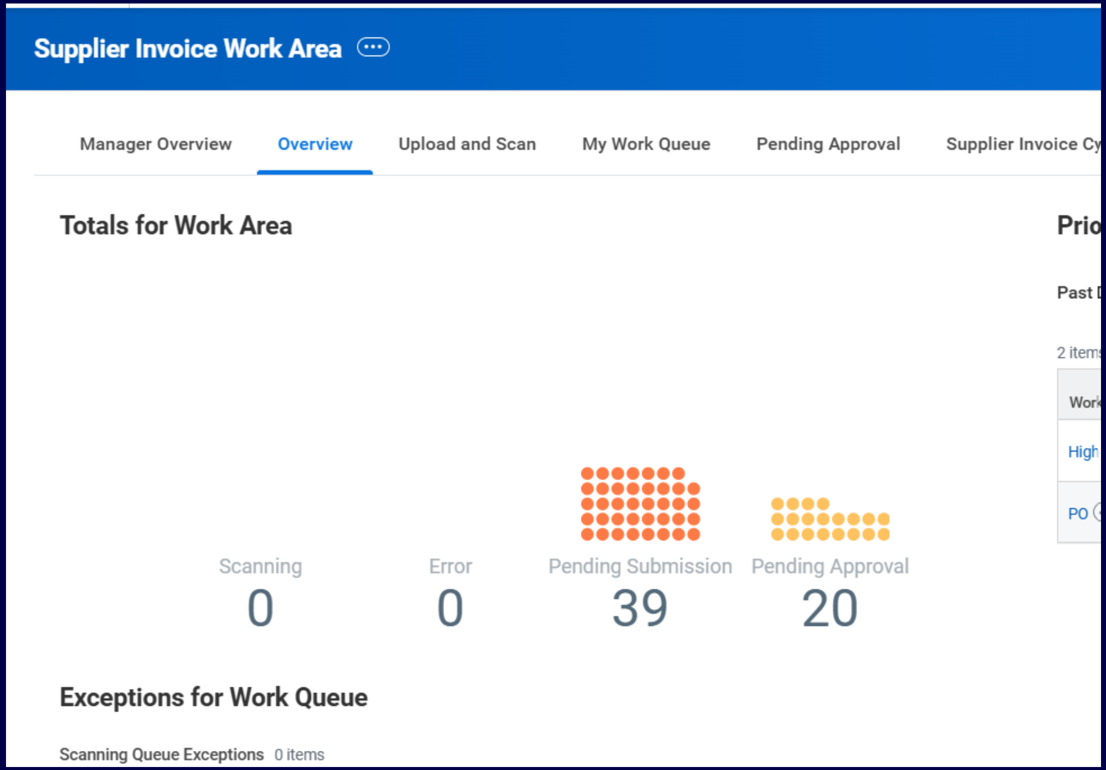
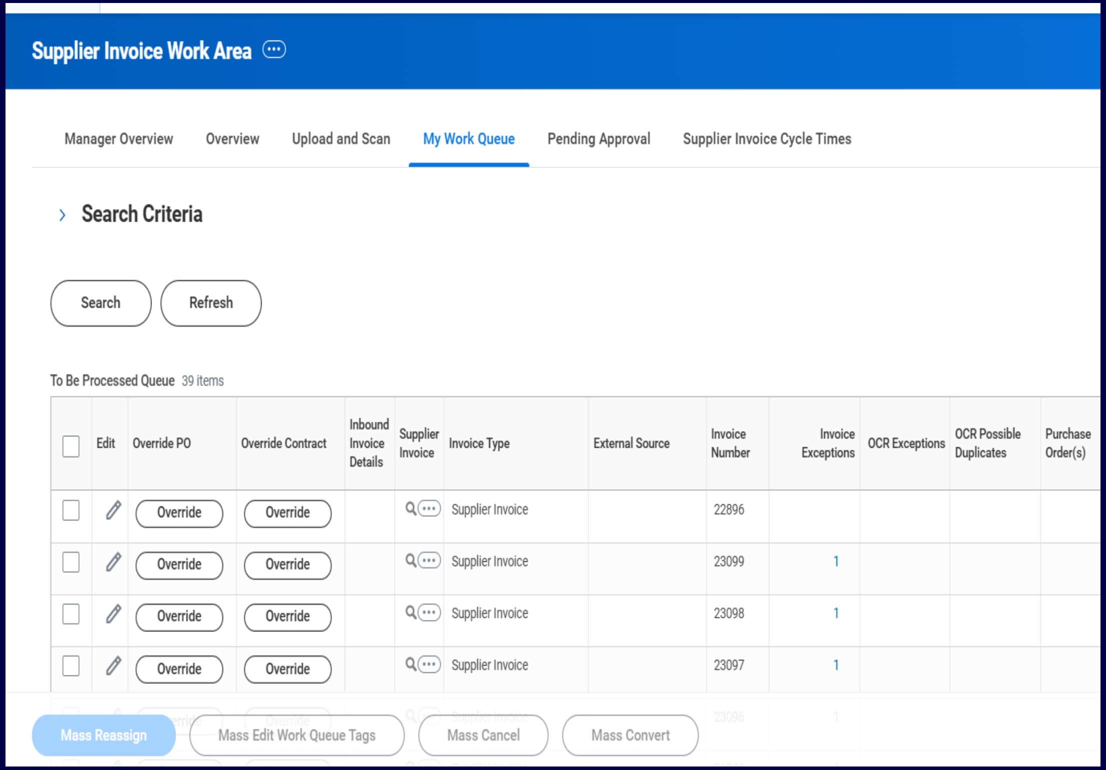
Supplier Invoice Work Area Improvements

Impact analysis

Before the release



After the release



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Header Field Highlighting for Workday Scanned Supplier Invoices

What's changing

With this release, Workday delivers additional features for Supplier Invoice Scanning (OCR) by highlighting equivalent header fields between your scanned invoice PDF and Workday invoice.

Additional Considerations

- When you enable Workday OCR for supplier invoices, workday now display corresponding annotations in the Workday invoice and scanned invoice PDF when you edit a scanned supplier invoice or supplier invoice adjustment.

What do I need to do

Set up OCR for Supplier Invoices and configure for PDF file extensions. See link in Related Information.

Note: This feature is only enabled for scanned PDF file extensions.

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/finsa/8616332.html

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Header Field Highlighting for Workday Scanned Supplier Invoices, cont.

Additional Considerations

You can:

- Use the new Scanned Highlights toggle switch on the scanned PDF to hide or display the annotations.
- Hover over an annotation in the Workday invoice to display a border around the scanned PDF field.
- Hover over an annotation in the scanned PDF to highlight the corresponding field on the Workday invoice.
- Select an annotation in either the Workday invoice or scanned PDF, and Workday takes you to the equivalent field in the corresponding invoice.

https://doc.workday.com/release-notes/en-us/finsa/8616332.html

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Header Field Highlighting for Workday Scanned Supplier Invoices

Impact analysis

Before the release	After the release
Before the release, there was no header fields highlighter	After the release, AP users will spend less time in processing and submitting supplier invoices with Supplier Invoice Scanning Field. Accounts payable users can quickly review scanning fields as the scanned fields will be highlighted

Impact description
This feature is only enabled for scanned PDF file extensions.

https://doc.workday.com/release-notes/en-us/finsa/8616332.html

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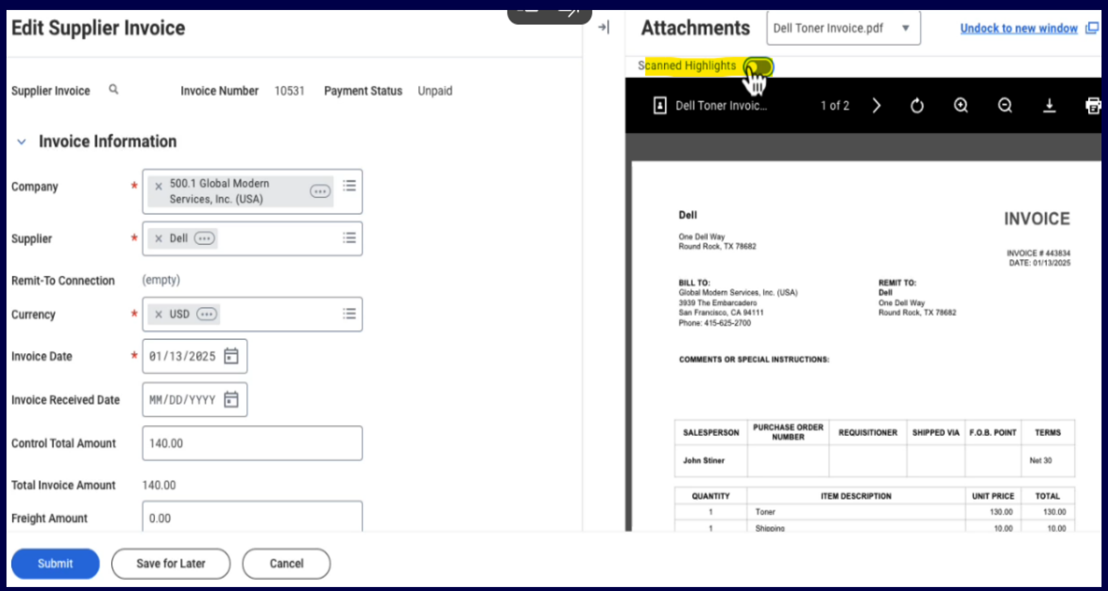
Header Field Highlighting for Workday Scanned Supplier Invoices

Impact analysis

Before the release

N/A

After the release



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Supplier Accounts Hub Enhancements

What’s changing

With this release, Workday delivers additional features to the Supplier Accounts Hub.

Additional Considerations

- Workday adds the Create Supplier Down Payment Invoice task to the Tasks card in the Overview section. Workday don't display this task when you enable worktag balancing for your tenant. By default, Workday includes this task in the Suggested Links section regardless of worktag balancing configuration.

What do I need to do

Configure domain security to access the Supplier Account Hub. See the 2024R2 Release Note link in the Related Information section.

What happens if I do nothing

N/A

https://doc.workday.com/release-notes/en-us/finsa/8616067.html

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Supplier Accounts Hub Enhancements, cont.

Additional Considerations

- Workday now include a filter side panel on the Manager Metrics section, and remove the filter from the Overview section. Workday also add a statement to the Manager Metrics subsections, informing you that the date filter defaults to the last 3 months and is based on the invoice creation date.

https://doc.workday.com/release-notes/en-us/finsa/8616067.html

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Automatically available

Supplier Accounts Hub Enhancements

Impact analysis

Before the release	After the release
Before the release, there was no enhancements to Supplier Accounts Hub.	After the release, These enhancement improve your user experience in the hub, which consolidates commonly-used tasks and reports for your Accounts Payable organization.

Impact description
Configure domain security to access the Supplier Account Hub.

https://doc.workday.com/release-notes/en-us/finsa/8616067.html

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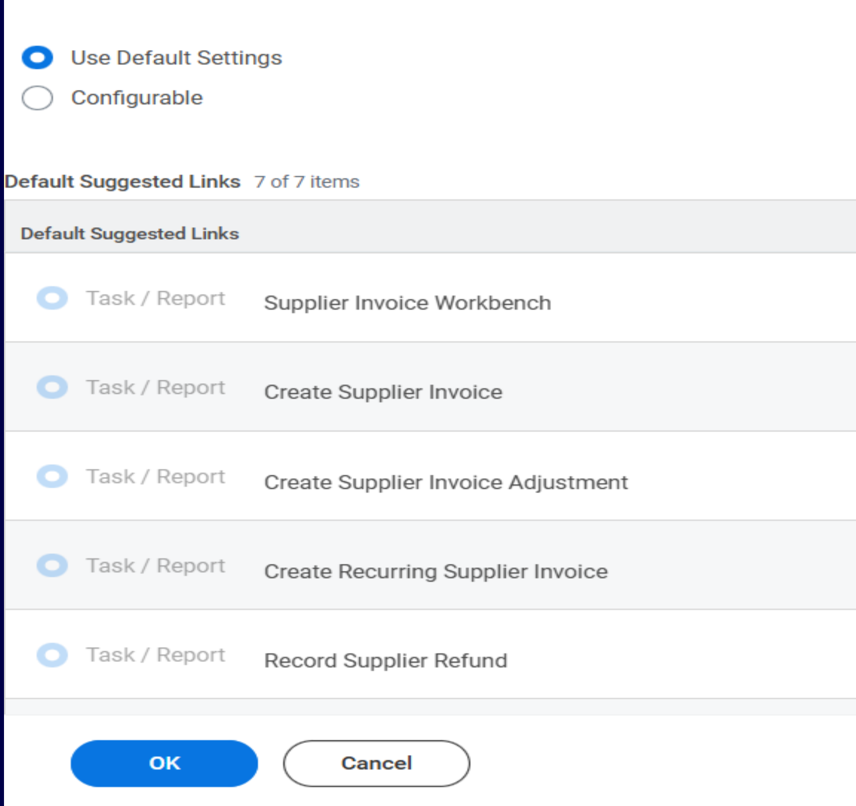
Automatically available

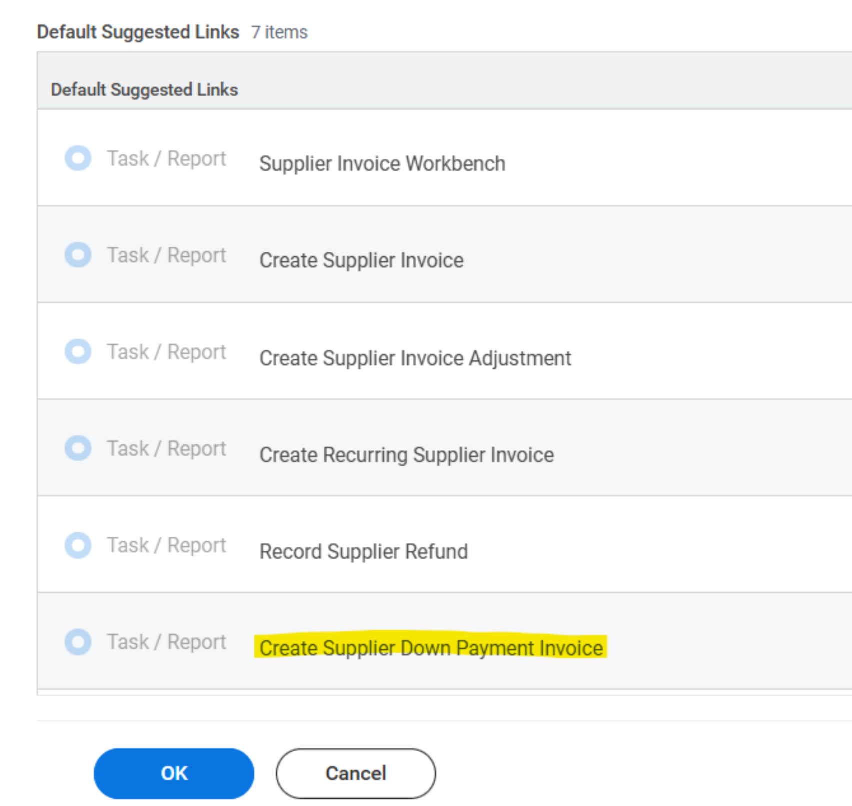
Supplier Accounts Hub Enhancements

Impact analysis

Before the release



After the release



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Supplier Invoice Pop Out for Attachment Previewer

What's changing

Workday now enables you to undock the supplier invoice attachment previewer to a separate window.

Additional Considerations

Workday delivers a new Undock to new window option on your supplier invoice attachments when editing a Workday invoice, enabling you to view the attachment in a new browser window.

- When you undock your supplier invoice attachment, select the Dock to right option to return the attachment to your split screen view.

What do I need to do

Ensure the Split Screen Default Option field on the Edit Tenant Setup - Financials task is configured to Always Expanded.

Edit a supplier invoice or supplier invoice adjustment with 1 or more attachments. On the attachment previewer, select the Undock to new window option to open the attachment in a new browser window.

Select the Dock to right option to return the attachment to a split screen view in the same browser window as your Workday invoice.

https://doc.workday.com/release-notes/en-us/uiplatform/8760765.html

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Supplier Invoice Pop Out for Attachment Previewer, cont.

Additional Considerations

- This browser window closes when you finish editing your Workday invoice.

Note: This feature is not available for mobile.

What happens if I do nothing

Nothing. This feature is automatically available for supplier invoice attachment previews.

https://doc.workday.com/release-notes/en-us/uiplatform/8760765.html

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Automatically available

Supplier Invoice Pop Out for Attachment Previewer

Impact analysis

Before the release	After the release
Before the release there was no pop out for Attachment Previewer.	After the release, effortlessly compare and analyze supplier invoice attachments. Streamline invoice processing tasks increasing efficiency and accuracy.

Impact description
Ensure the Split Screen Default Option field on the Edit Tenant Setup - Financials task is configured to Always Expanded

https://doc.workday.com/release-notes/en-us/uiplatform/8760765.html

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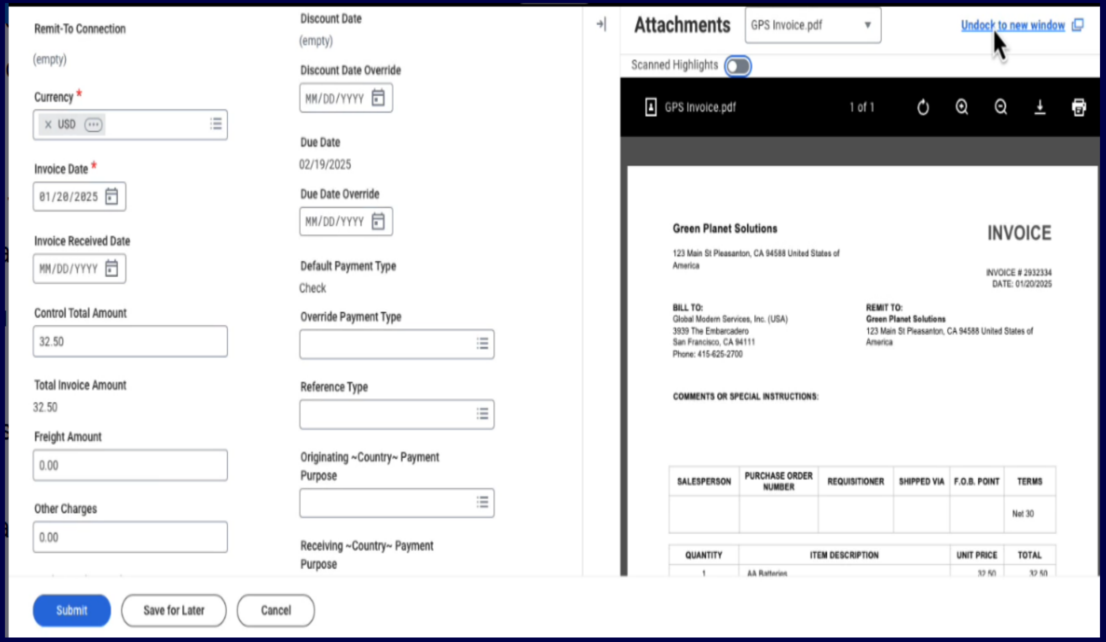
Automatically available

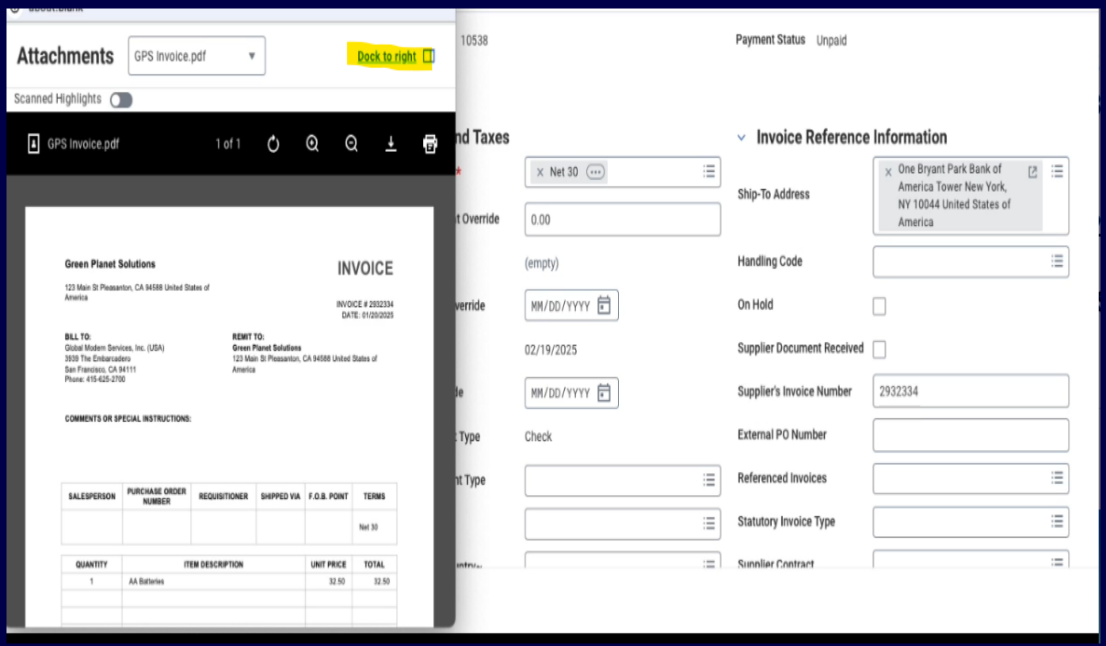
Supplier Invoice Pop Out for Attachment Previewer

Impact analysis

Before the release



After the release



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View Purchase Order Line Due Date on Purchase Order Override Task

What do I need to do

Workday add a Due Date field to the Select Purchase Order Lines to be added tab in the Purchase Order Override task.

Additional Considerations

- Workday add a view-only Due Date column to the Select Purchase Order Lines to be added tab on the Purchase Order Override task. The Due Date column is filterable and sortable and only displays if you specify a due date for the purchase order.

Note: the Due Date column doesn't display on the:

- Edit Supplier Invoice task.
- Select invoice Lines to Keep tab of the Purchase Order Override task.

What do I need to do

You don't need to do anything to uptake this feature.

What happens if I do nothing

You still see the Due Date column on the Select Purchase Order Lines to be Added tab of the Purchase Order Override task.

https://doc.workday.com/release-notes/en-us/finsa/8482499.html

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View Purchase Order Line Due Date on Purchase Order Override Task

Impact analysis

Before the release	After the release
Before the release, this feature does not exist	After the release, the purchase order line matching experience for you, as an Accounts Payable user, by matching purchase order lines to invoice lines based on the due date on the purchase order. This is most applicable for service-based purchase orders where the same description appears on all service lines, and the due date is the only differentiator for invoice matching.

Impact description
You don't need to do anything to uptake this feature.

https://doc.workday.com/release-notes/en-us/finsa/8482499.html

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Automatically available

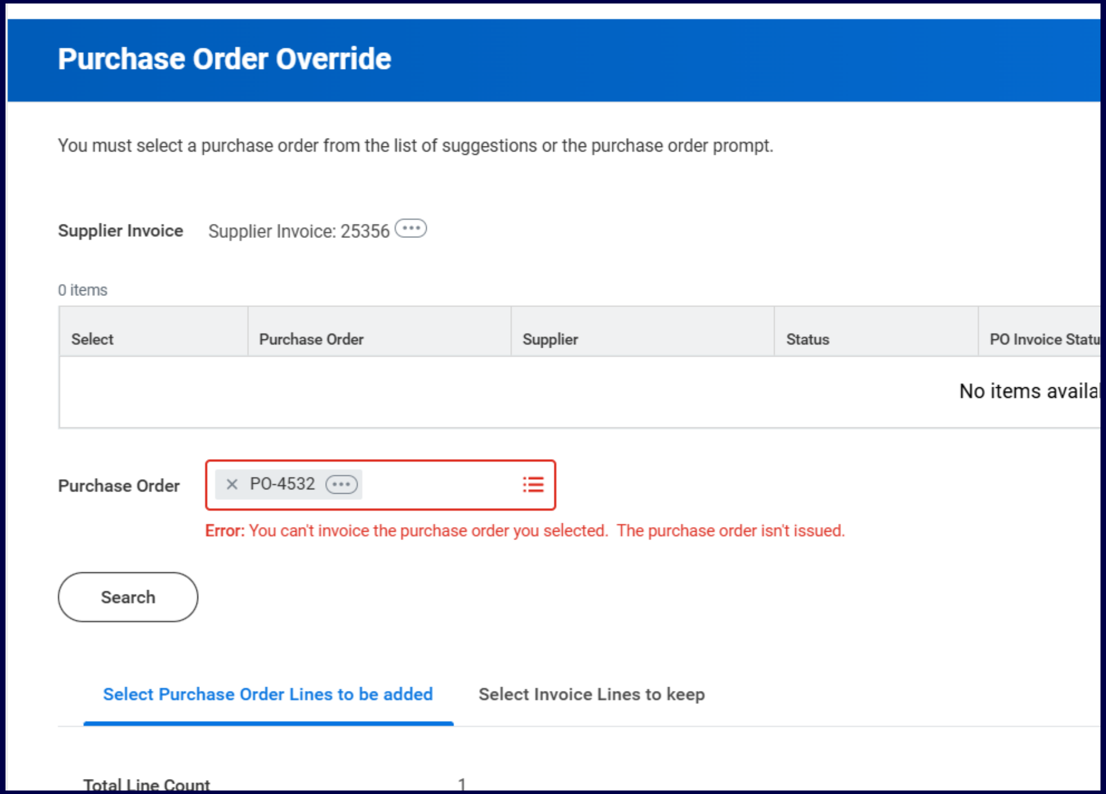
View Purchase Order Line Due Date on Purchase Order Override Task

Impact analysis

Before the release

N/A

After the release



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Purge Supplier Accounts Attachments

What's changing

Workday enables you to purge attachments from key supplier accounts documents in Workday.

Additional Considerations

You can now use the Purge Person Data task to purge many supplier accounts attachments and their details from these documents:

- Netting Transaction Attachments
- OCR Supplier Invoice Attachments
- Procurement Card Transaction Verification Header and Summary Attachments

What do I need to do

To purge Supplier Accounts attachments:

Create a privacy purge custom report on the relevant report data source. See Create a Privacy Purge Custom Report.

Access the Purge Person Data task and select the custom report. See Steps: Purge Person Privacy Data.

Use the report field Has Attachments at the report line level when creating the Privacy Purge custom report to limit the instances returned by the purge report.

https://doc.workday.com/release-notes/en-us/finsa/8601087.html

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Purge Supplier Accounts Attachments, cont.

Additional Considerations

- Recurring Supplier Invoice Attachments
- Supplier Invoice Adjustment Attachments
- Supplier Invoice Attachments
- Supplier Invoice Request Attachments
- Supplier Refund Attachments

What do I need to do

If your report data source doesn't have this field, the report could include instances without attachments. However, the purge process won't impact these instances.

After you purge attachments, you can still see that there were attachments on financial entities. However, you can’t view details about, or download, these attachments, and Workday no longer stores this information.

Note: Workday can’t reverse or roll back the deletion/purge in your tenant.

What happens if I do nothing

You aren’t able to use this feature to purge attachments without setting it up first.

https://doc.workday.com/release-notes/en-us/finsa/8601087.html

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cognizant

Setup required

Purge Supplier Accounts Attachments

Impact analysis

Before the release	After the release
Before the release, there was no option to purge Supplier Accounts Attachments	After the release, able to purge the below Supplier Accounts attachments. • Netting Transaction Attachments • OCR Supplier Invoice Attachments • Procurement Card Transaction Verification Header and Summary Attachments • Recurring Supplier Invoice Attachments • Supplier Invoice Adjustment Attachments • Supplier Invoice Attachments • Supplier Invoice Request Attachments • Supplier Refund Attachments

Impact description
Purging attachments helps you meet privacy and document retention requirements

https://doc.workday.com/release-notes/en-us/finsa/8601087.html

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Setup required

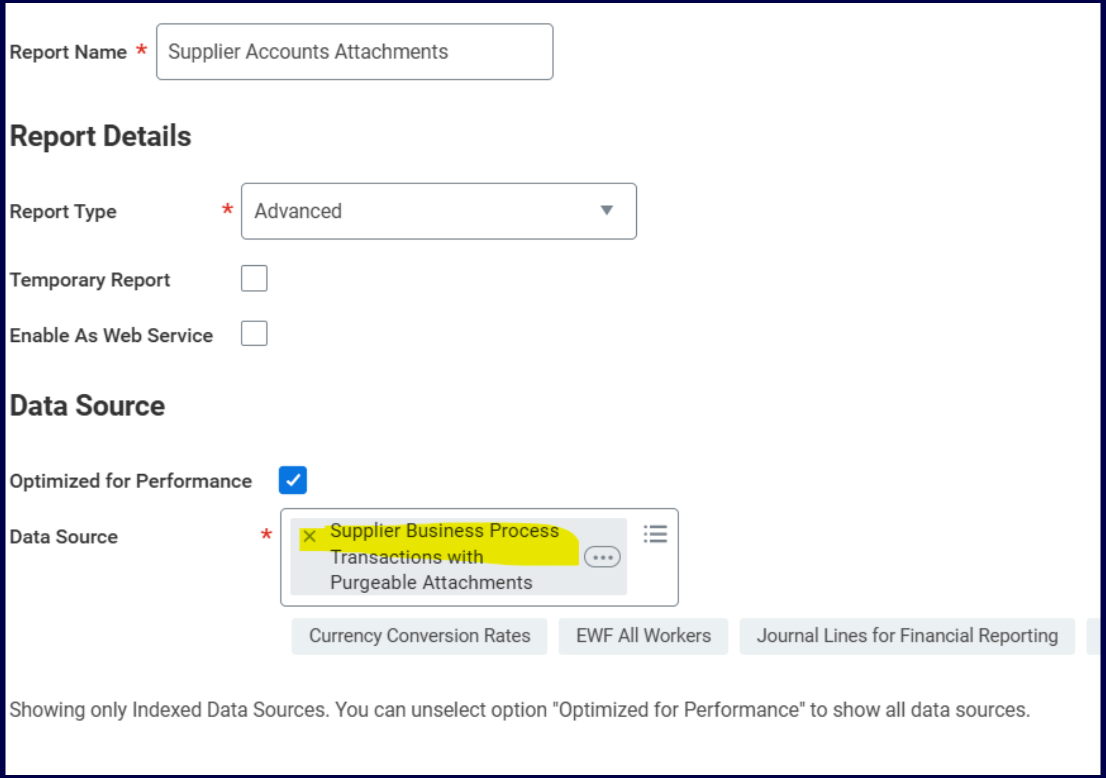
Purge Supplier Accounts Attachments

Impact analysis

Before the release

N/A

After the release



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Additional Discount Days on Supplier Invoices

What's changing

Workday now enables you to take a discount on a supplier payment beyond the Workday- calculated discount due date.

Additional Considerations

Workday delivers these changes to support this feature:

- Workday updates the Edit Tenant Setup-Financials task.
- Workday updates the View Supplier Invoice task.
- Workday delivers the new CRF, Additional Discount Days on Supplier Invoice Document.

What do I need to do

This feature adds additional discount days to enable you to take the prompt pay discount defined in the invoice payment term. You must have discount payment terms to be able to use this feature. If you use a pay term without a discount, nothing happens.

You set this feature at the tenant level. You can't set this up by company. Workday recommends that you don't change this often after setup because this field isn't auditable/effective dated.

https://doc.workday.com/release-notes/en-us/finsa/8437090.html

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Additional Discount Days on Supplier Invoices, cont.

What happens if I do nothing

If you don't opt in to this feature, you won't be able to take a discount automatically on a supplier payment beyond the Workday- calculated discount due date. You can still use discount override dates to take a discount later than the calculated discount date.

https://doc.workday.com/release-notes/en-us/finsa/8437090.html

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Setup required

Additional Discount Days on Supplier Invoices

Impact analysis

Before the release	After the release
Before the release, Workday does not enable to take a discount on a supplier payment beyond the Workday-calculated discount due date.	After the release, Workday enables you to take a discount on a supplier payment beyond the Workday- calculated discount due date.

Impact description
This feature adds additional discount days to enable you to take the prompt pay discount defined in the invoice payment term.

https://doc.workday.com/release-notes/en-us/finsa/8437090.html

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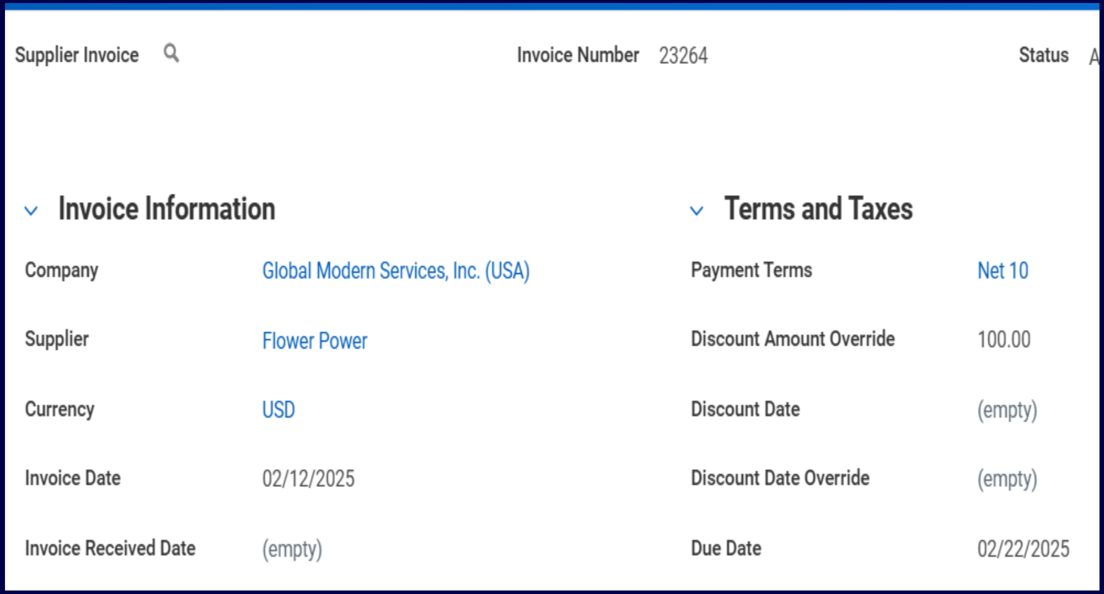
Setup required

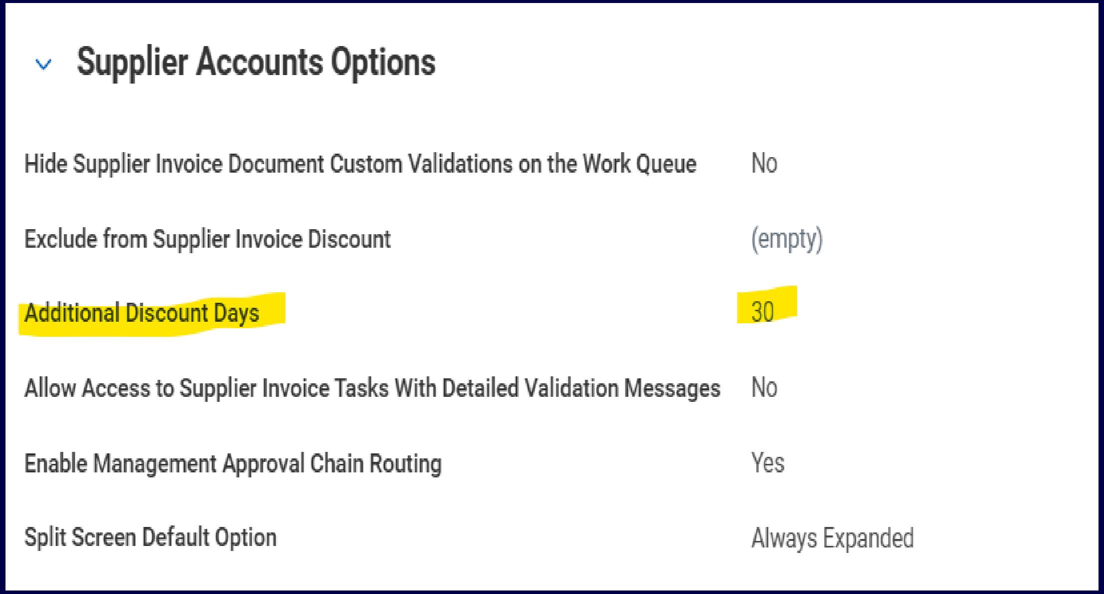
Additional Discount Days on Supplier Invoices

Impact analysis

Before the release



After the release



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Setup required

Hide or Show Optional Fields on Supplier Invoices

What's changing

Workday now enables you to hide or make optional fields required on supplier invoices and supplier invoice adjustments.

What do I need to do

If you want to hide or make a field required for supplier invoices, you can uptake this feature using the Configure Optional Fields task.

Configuration Steps

1. Navigate to Configure Optional Fields > Supplier Accounts > Supplier Invoice Event.
2. Select the fields that you want to be hidden or required.

   If you choose Security Group in the Criteria field, you can specify which security groups the field is hidden for or required for.

https://doc.workday.com/release-notes/en-us/finsa/8482471.html

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Hide or Show Optional Fields on Supplier Invoices, cont.

Additional Considerations

You can now use the Configure Optional Fields task to hide or require fields on the following business documents and their related tasks:

- Supplier Invoice Adjustments
- Supplier Invoices
    - Tasks: Create/Copy/Edit/Review/Revise
    - Flip from: PO/Receipt/Supplier Invoice Request/Contract
  - Note: When you make a field required, you can't submit the invoice unless the field is populated.

What happens if I do nothing

If you don't perform the required setup, you can't show or hide fields on supplier invoices.

https://doc.workday.com/release-notes/en-us/finsa/8482471.html

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Hide or Show Optional Fields on Supplier Invoices

Impact analysis

Before the release	After the release
Before the release, these below field are not found to hide. • **Approver** • **Control Total Amount** • **Document Link** • **Document Memo** • **External PO Number** • **Handling Code** • **Reference Type** • **Statutory Invoice Type** • **Supplier's Invoice Number** • **Supplier Document Received**	After the release, these fields are available for configuration on supplier invoices; • **Approver** • **Control Total Amount** • **Document Link** • **Document Memo** • **External PO Number** • **Handling Code** • **Reference Type** • **Statutory Invoice Type** • **Supplier's Invoice Number** • **Supplier Document Received**

Impact description
Now able to Configure Optional Fields task to hide or require fields on the Supplier Invoice and Supplier Invoice Adjustments business documents and their related tasks.

https://doc.workday.com/release-notes/en-us/finsa/8482471.html

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Setup required

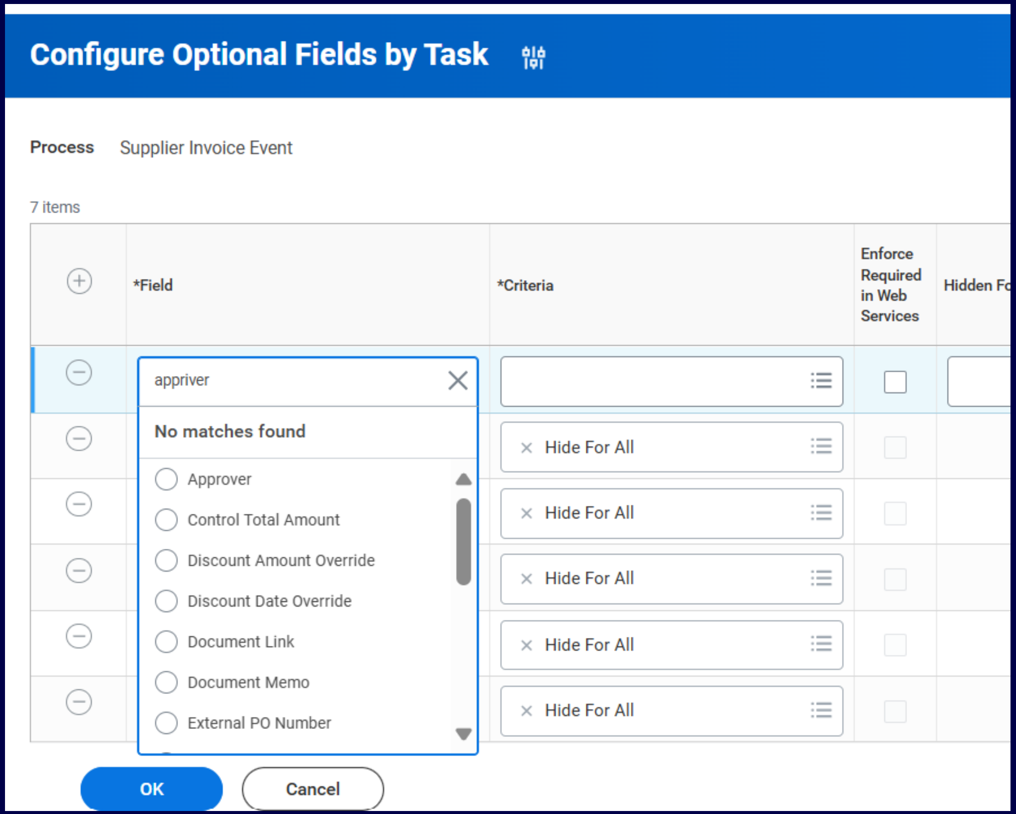
Hide or Show Optional Fields on Supplier Invoices

Impact analysis

Before the release

N/A

After the release



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Machine Learning Automatically Links Supplier Invoice Lines to Associated Purchase Order Lines

What's changing

- Machine Learning now automatically links supplier invoice lines to their associated purchase order lines when you create a supplier invoice.
- Note: When you uptake this feature, it might take up to 2 weeks for machine learning to begin returning matched line recommendations.

What do I need to do

If you haven't already done so, you need to opt in to Supplier Invoice Automation. See https://doc.workday.com/admin-guide/en-us/financial-management/supplier-accounts/inv[…]upplier-invoice-work-area/iws1551246053704.html.

If you are already opted in to Supplier Invoice Automation, check your Innovation and Data Services Opt in to make sure you opt in to all additional data for Supplier Invoice Automation. You also need to update your OCR tenant options to Enable Machine Learning PO Line Level Matching.

https://doc.workday.com/release-notes/en-us/finsa/8014172.html

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Machine Learning Automatically Links Supplier Invoice Lines to Associated Purchase Order Lines, cont.

Additional Considerations

- On the Supplier Accounts OCR Tenant Options task, workday add a new Machine Learning PO Line Linking option that enables the new machine learning PO Line matching model in your tenant.
- Workday also move the option, Disable Line Level OCR Scanning, from the first of three options to the last of three options in the PO and PO lines section of the Supplier Accounts OCR Tenant Options task.
- Finally workday add the new option, Enable PO Linked Lines Only to, and reorganize the options on, the Edit Supplier Accounts OCR Tenant Options task.
- Consider the following when you configure PO line level matching:

What happens if I do nothing

You aren't able to use machine learning to automatically link purchase order lines to supplier invoice lines.

https://doc.workday.com/release-notes/en-us/finsa/8014172.html

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Machine Learning Automatically Links Supplier Invoice Lines to Associated Purchase Order Lines, cont.

Additional Considerations

- If you enable Machine Learning PO Line Level Matching, you
- Can still Disable Line Level OCR scanning for non-purchase order invoices. If you choose this configuration, scanned invoices with both PO and non-PO invoice lines only pull in PO-related lines.
- If you want to pull in line level data for PO-related and non-PO related invoices, leave the Disable Line Level OCR Scanning field empty.
- You must also leave Machine Learning PO matching enabled (that is, don't click the Disable check box) if you are using PO Line Level Matching.
- If you enable Machine Learning PO Line Level Matching, you

https://doc.workday.com/release-notes/en-us/finsa/8014172.html

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Machine Learning Automatically Links Supplier Invoice Lines to Associated Purchase Order Lines, cont.

Additional Considerations

- Note: With the release of PO Line Linking, invoice automation scanning now leverages Large Language Models (Generative AI):
- These Workday-trained Large Language Models (Generative AI) are hosted in the US and EU only. All US customers use the US Large Language Models (Generative AI), and all non-US customers (EU, CA, AUS, and SIN) use the EU Large Language Models (Generative AI).
- Additionally, you can't opt out of Generative AI unless you want to opt out of the entire invoice automation feature.

https://doc.workday.com/release-notes/en-us/finsa/8014172.html

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Setup required

Machine Learning Automatically Links Supplier Invoice Lines to Associated Purchase Order Lines

Impact analysis

Before the release	After the release
Before the release it did not exist	After the release, ML automatically links supplier invoice lines to associated PO Lines

Impact description
After the release, ML automatically links supplier invoice lines to associated PO Lines

https://doc.workday.com/release-notes/en-us/finsa/8014172.html

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Touchless Supplier Invoices

What's changing

Workday automatically submits purchase order-related OCR supplier invoices into the business process according to a set of rules that you configure.

Note: Workday revert the product name, Auto Submission of OCR Supplier Invoices, to the original product name, Touchless Supplier Invoices.

Additional Considerations

Workday create the new task, Maintain Supplier Invoice Auto Submit Rules.

Workday update these web services so you can upload auto-submit rules:

Get Maintain Configurable Rules Table Web Service

Put Maintain Configurable Rules Table Web Service

What do I need to do

Use Maintain Supplier Invoice Auto Submit Rules to create auto-submission rules for OCR supplier invoices.

What happens if I do nothing

You can't configure rules for submitting OCR supplier invoices into the business process automatically.

https://doc.workday.com/release-notes/en-us/finsa/8014187.html

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Touchless Supplier Invoices, cont.

Additional Considerations

Workday also deliver a new Find Supplier Invoices Processed by OCR report that displays all of the invoices that you process by OCR, which of those OCR invoices you auto-submitted, and which of those OCR invoices you didn't auto-submit.

When configuring Invoice Auto Submit rules, consider:

Auto-submit rules only apply to OCR supplier invoices that are related to purchase orders and that don't contain more than 100 lines.

You can use the following criteria to create rules: supplier groups, supplier categories, suppliers, companies/company hierarchies, total invoice amount less than, currency, and max number of lines.

https://doc.workday.com/release-notes/en-us/finsa/8014187.html

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Touchless Supplier Invoices, cont.

Additional Considerations

Order rules from the most specific to the least specific. When conditions of a rule are met, Workday stops evaluating the invoice against the rules and processes the invoice for auto-submission.

If none of the configuration rules are met, Workday creates OCR invoices in Draft status and doesn't automatically submit them for review.

Even if Workday determines that the OCR invoice is "auto-submittable" via rule criteria, it may still not be able to be auto-submitted due to missing data or system or custom validations that would cause a submission failure. In this case, Workday creates the invoices in Draft status.

https://doc.workday.com/release-notes/en-us/finsa/8014187.html

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Touchless Supplier Invoices, cont.

Additional Considerations

After a rule is in use, if you no longer want to apply the rule, you can use the Inactive check box to stop Workday from evaluating invoices against the rule.

Please use this form to provide feedback as you test this feature in your preview tenant.

https://doc.workday.com/release-notes/en-us/finsa/8014187.html

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Setup required

Touchless Supplier Invoices

Impact analysis

Before the release	After the release
Before the release this feature does not exist.	After the release,Workday automatically submits purchase order-related OCR supplier invoices into the business process according to a set of rules that you configure

Impact description
Automatically submits PO related OC Supplier Invoices into business process.

https://doc.workday.com/release-notes/en-us/finsa/8014187.html

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Setup required

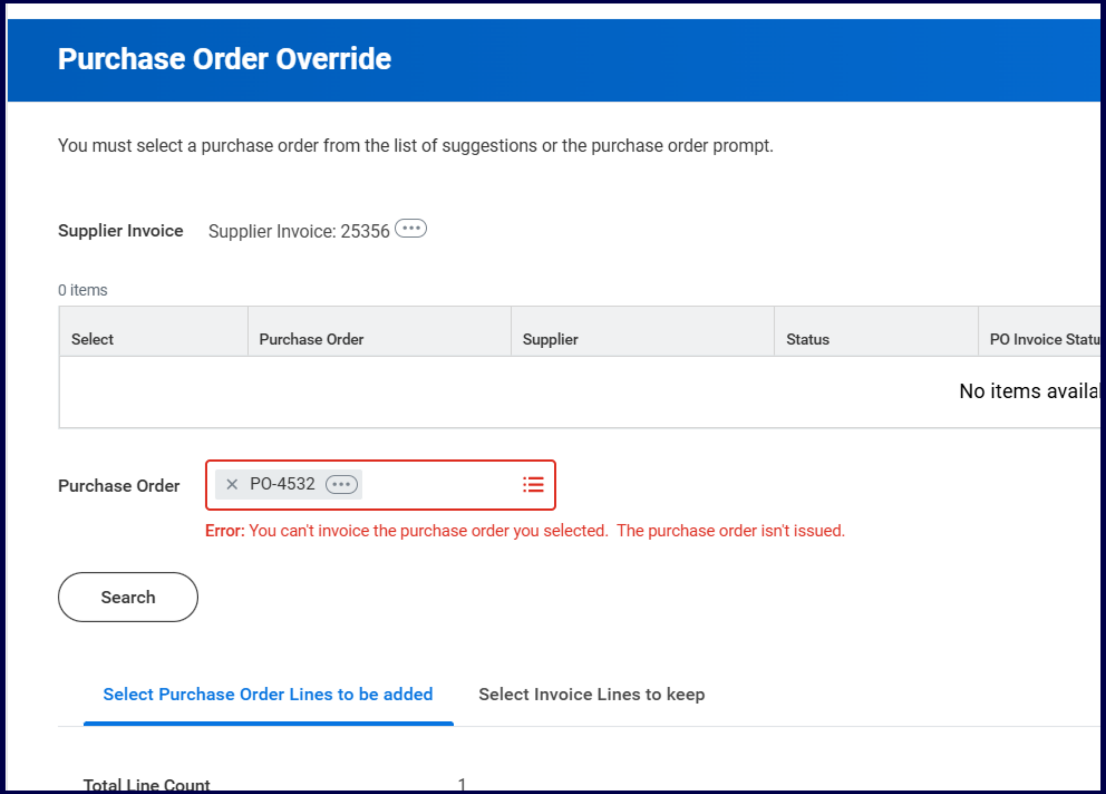
Touchless Supplier Invoices

Impact analysis

Before the release

N/A

After the release



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Talent Management

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Advance Steps in the Assess Skills Business Process

What's changing

Workday improves business process management for skill assessments.

Additional considerations

Workday now enables you to advance steps of the Assess Skills business process before the steps are complete.

You can advance steps:

- Manually by accessing individual in-progress skill assessments.
- Using the Mass Advance Business Process task.
- Using the Mass Operation Management task.

What do I need to do

- Set up Skills Cloud.
- To initiate the Mass Advance Business Process task, you must be in a security group with access to the Manual Advance action in the Who Can Do Actions on Entire Business Process section of the business process security policy.

What happens if I do nothing

Without the required permissions, you can't advance steps in the assess skills business process.

https://doc.workday.com/release-notes/en-us/skills/8729573.html

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Advance Steps in the Assess Skills Business Process

Impact analysis

Before the release	After the release
Mass Advance step was not available for the Assess Skill Business Process.	With this update, Workday allows us to keep skill assessment data and complete skill assessments even when 1 or multiple steps on the *Assess Skills* business process are not completed.

Impact description
Workday improves business process management for skill assessments.

https://doc.workday.com/release-notes/en-us/skills/8729573.html

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Automatically available

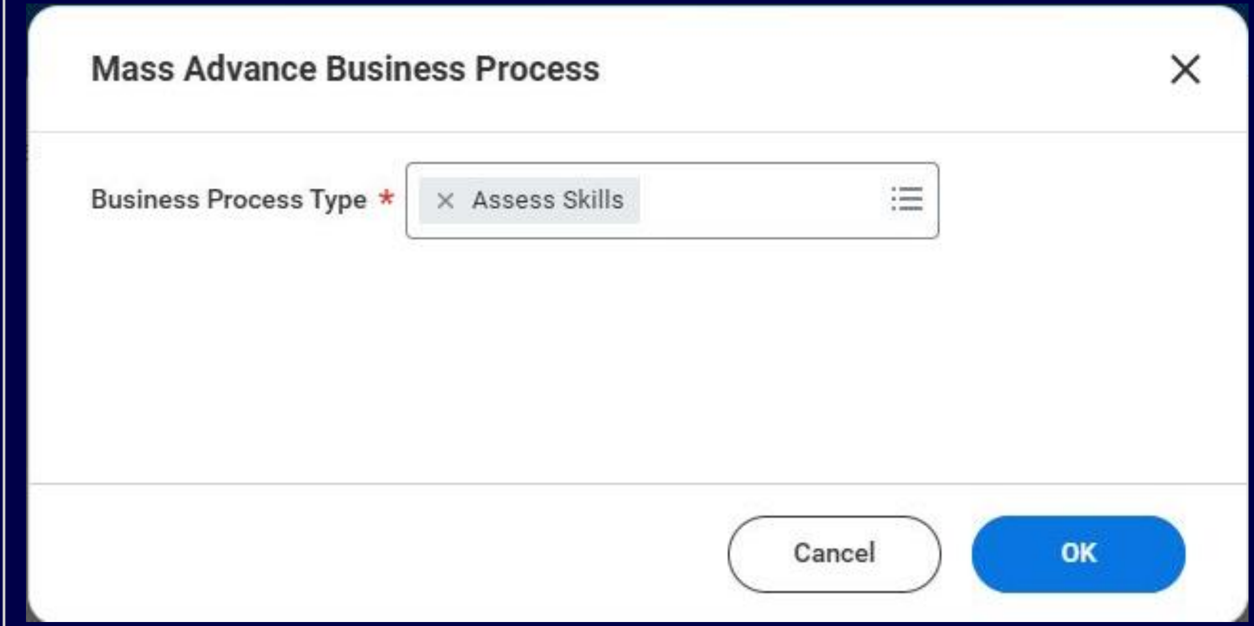
Advance Steps in the Assess Skills Business Process

Impact analysis

Before the release

N/A

After the release



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Flex Team Details on Mobile

What's changing

Workday updates the look and feel of flex team details on the mobile application to match the look and feel of flex team details on mobile browsers.

What do I need to do

Nothing, this enhancement is automatically available.

Additional considerations

When you view flex team details on the mobile application, Workday now displays graphics, fonts, and other items that match flex team details on mobile browsers.

What happens if I do nothing

Flex team details have the same look and feel on the mobile application and on mobile browsers.

https://doc.workday.com/release-notes/en-us/gigs/8533576.html

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Automatically available

Flex Team Details on Mobile

Impact analysis

Before the release	After the release
Flex team details have the same look and feel on the mobile application and on mobile browsers.	The matching user interfaces make flex teams on mobile devices a more consistent experience.

Impact description
When you view flex team details on the mobile application, Workday now displays graphics, fonts, and other items that match flex team details on mobile browsers.

https://doc.workday.com/release-notes/en-us/gigs/8533576.html

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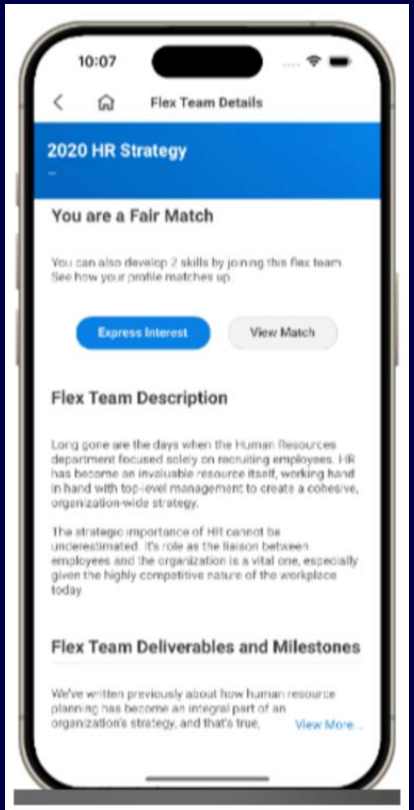
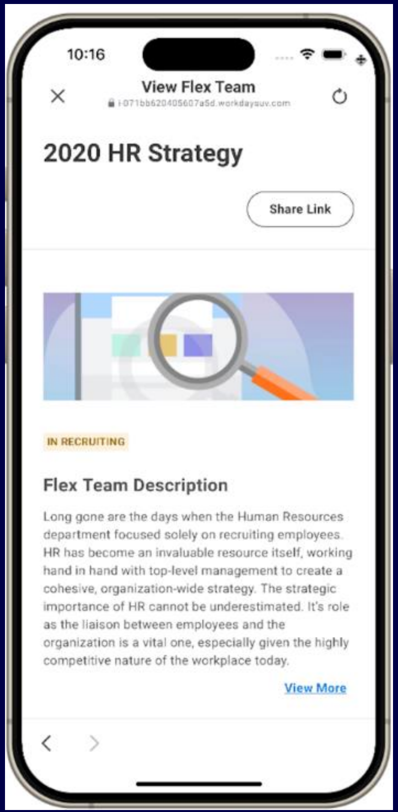
Flex Team Details on Mobile

Impact analysis

Before the release



After the release



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Setup required

Mass Populate Worker Profiles with Skills

What's changing

Workday delivers the new Set Up: Mass Populate Worker Profile Skills domain and update the Mass Populate Workers Profile Skills task to give you more options for adding skills to worker profiles.

Additional considerations

N/A

What do I need to do

- Enable Skills Cloud.
- Configure the Set Up: Maintain Skills and Experience domain.
- Configure the Set Up: Mass Populate Worker Profile Skills domain.
- Enable Suggested Skills for Job Profiles.
- Configure the notification workers receive when this task adds skills to their profile in the Maintain Skills and Experience task.

What happens if I do nothing

Workers have to add skills to their own profiles.

https://doc.workday.com/release-notes/en-us/sa/8051768.html

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Setup required

Mass Populate Worker Profiles with Skills

Impact analysis

Before the release	After the release
Workers have to add skills to their own profiles.	Workday now enables to Mass Populate Worker Profiles with Skills.

Impact description
Workday delivers the Mass Populate Worker Profile Skills task (secured to the new Set Up: Mass Populate Worker Profile Skills domain) to enable you to mass populate worker profiles with skills. This task enables you to choose the skills you want to populate based on these possible sources: • Explicit skills for workers' primary job profiles. • Suggested skills based on workers' primary job profiles.

https://doc.workday.com/release-notes/en-us/sa/8051768.html

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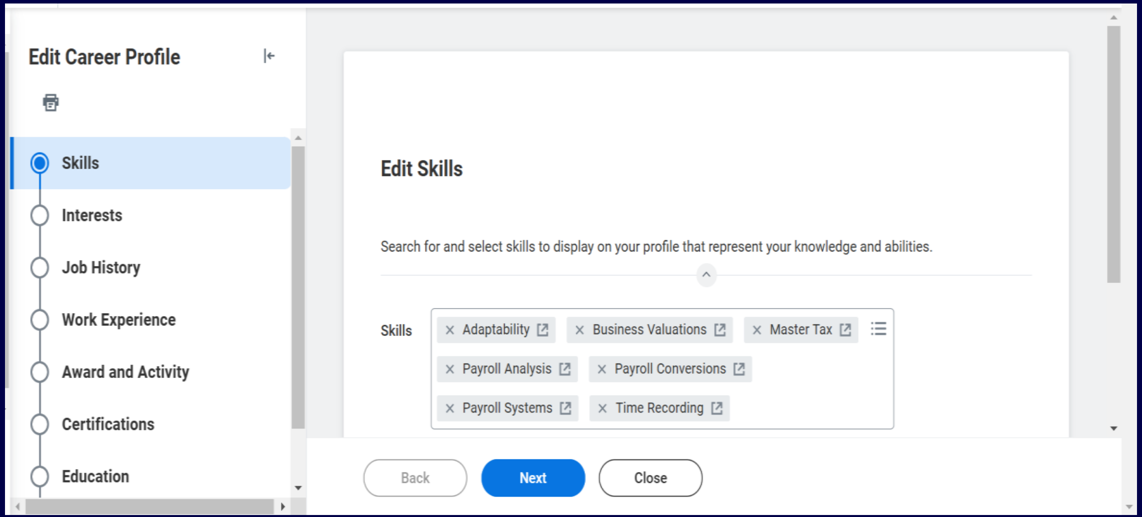
Setup required

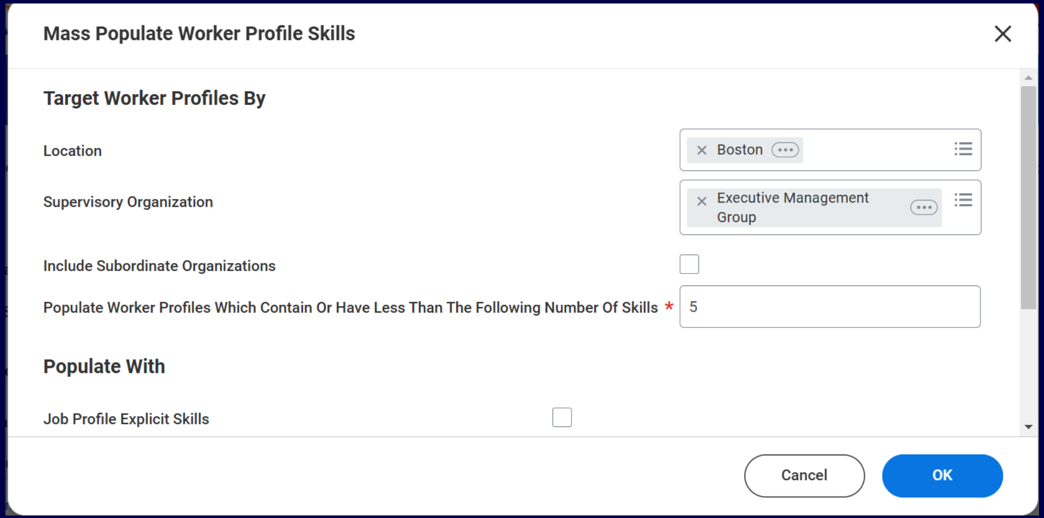
Mass Populate Worker Profiles with Skills

Impact analysis

Before the release



After the release



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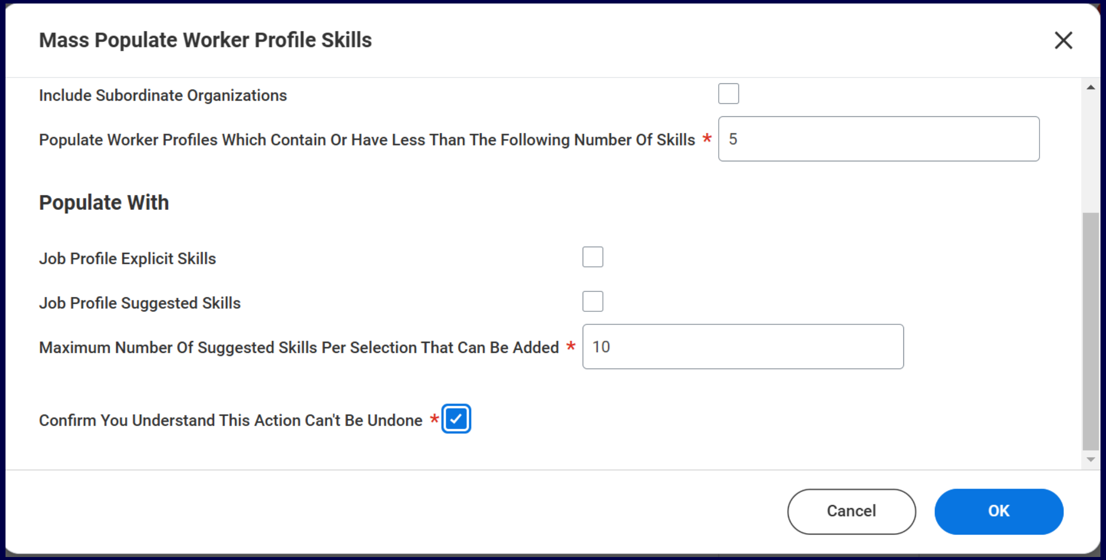
Setup required

Mass Populate Worker Profiles with Skills

Impact analysis

After the release



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Flex Teams Web Services

What's changing

Workday deliver these new web services (secured to the Manage: Flex Teams domain):

- Complete Flex Team.
- Get Flex Team Endorsements.
- Put Flex Team Endorsements.

Additional considerations

You might need to take additional steps to enable this feature depending on your organization's subscription service agreement.

What do I need to do

You might need to take additional steps to enable this feature based on your organization's subscription service agreement. To determine your subscription service agreement:

- Select your profile avatar on Community.
- Select Profile.
- On your profile page, select your organization's name, which is beneath your name and next to your job title.
- View your Subscription Service Agreement value.

What happens if I do nothing

You can continue to complete flex teams and add flex team endorsements as you do today.

https://doc.workday.com/release-notes/en-us/gigs/8402931.html

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Setup required

Flex Teams Web Services

Impact analysis

Before the release	After the release
Flex Teams Web Services isn’t available before the release.	The new web services enable you to more easily import and export flex teams data.

Impact description
Complete Flex Team Web Service: • 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

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Setup required

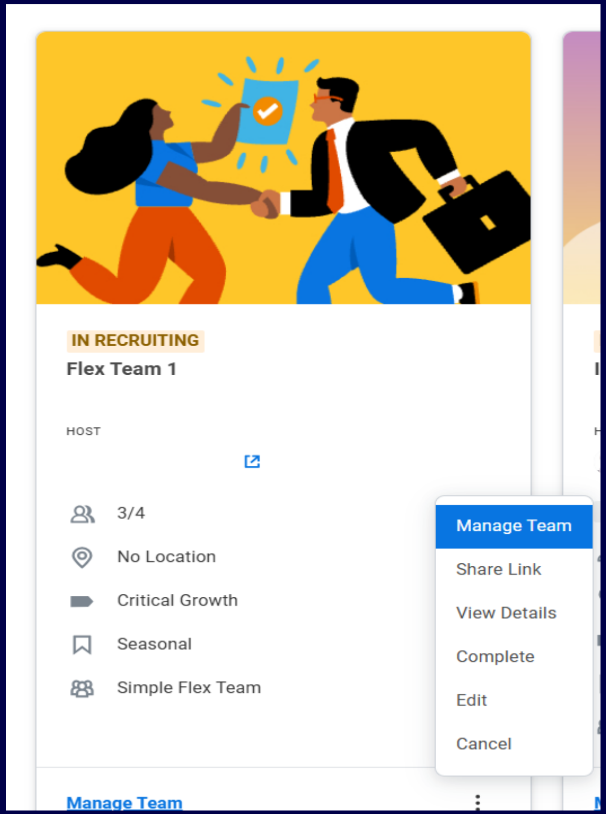
Flex Teams Web Services

Impact analysis

Before the release

N/A

After the release



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Time Tracking

Back to table of contents

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Midweek Project Changes with Enter Time by Type

What's changing

With this release, workers can enter project time in Enter Time by Type after midweek project or project plan task eligibility changes, or midweek project inactivation.

Additional considerations

Workers no longer receive a validation message for approved and unmodified time entries after a midweek:

- Project inactivation.
- Project eligibility change.
- Project plan task eligibility change.

Note: To avoid critical validation errors, managers and administrators must approve time entries before they:

- Inactivate the project they're related to.
- Change worker eligibility for the project or project plan task.

What do I need to do

You don't need to take action.

What happens if I do nothing

There's no impact if you do nothing.

https://doc.workday.com/release-notes/en-us/time/8765126.html

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Midweek Project Changes with Enter Time by Type

Impact analysis

Before the release	After the release
Workers receive a validation message for approved and unmodified time entries after a midweek project changes.	Workers will no longer receive a validation message for approved and unmodified time entries after a midweek project or project plan task eligibility changes, or midweek project inactivation.

Impact description
Workers will no longer receive a validation message for approved and unmodified time entries after a midweek project or project plan task eligibility changes, or midweek project inactivation.

https://doc.workday.com/release-notes/en-us/time/8765126.html

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Enter Time by Type Comments

What's changing

Workday continues to improve the Enter Time by Type user experience with enhancements to the Comments pop-up.

What do I need to do

The changes to Comments are available automatically. Workday recommend that you update your training materials so that users are aware of the changes to the time entry methods.

Additional considerations

When your users enter time by type, they can now enter comments for each day in a vertically expandable field. Workday remove the table format for better accessibility.

What happens if I do nothing

Your users will still see a vertically expandable field to enter comments for each day instead of a table.

https://doc.workday.com/release-notes/en-us/time/8735765.html

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Enter Time by Type Comments

Impact analysis

Before the release	After the release
While using "Enter Time by Type" option to enter time, comments section can be clicked on expand to enter the comments.	With this release, Workday improved the user experience which allows users to enter time by type, they can now enter comments for each day in a vertically expandable field. Old table format is removed.

Impact description
The new comments pop-up improves the user experience and accessibility by enabling the users to enter comments on their project time more effectively.

https://doc.workday.com/release-notes/en-us/time/8735765.html

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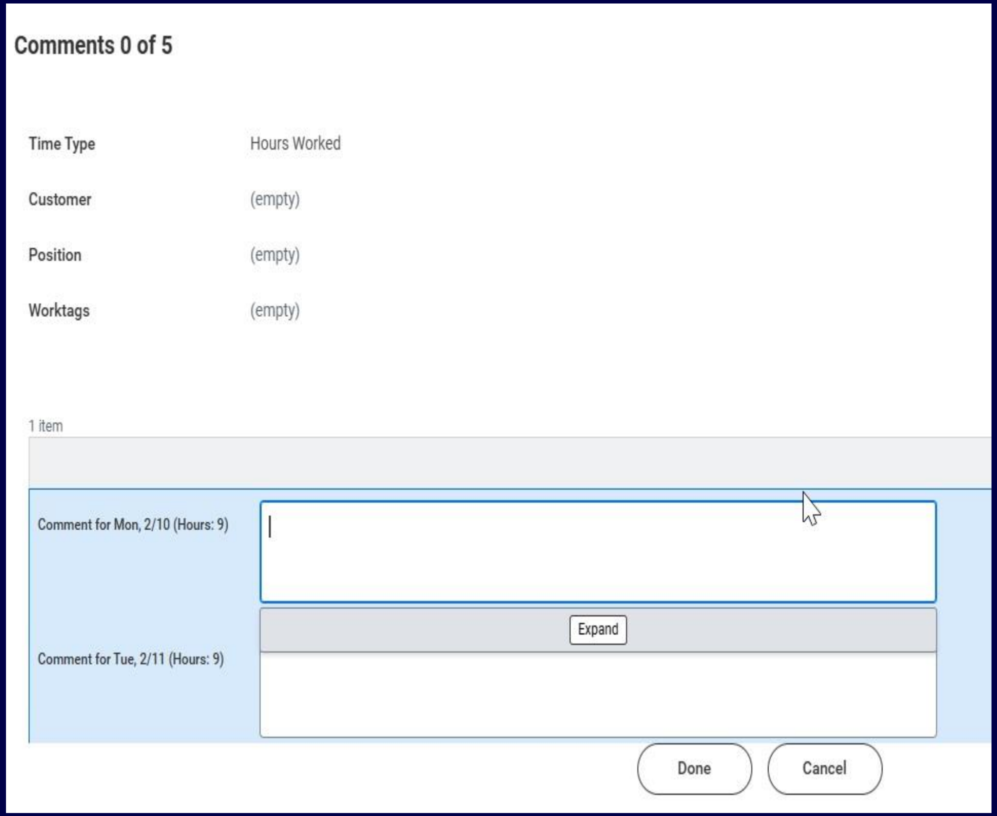
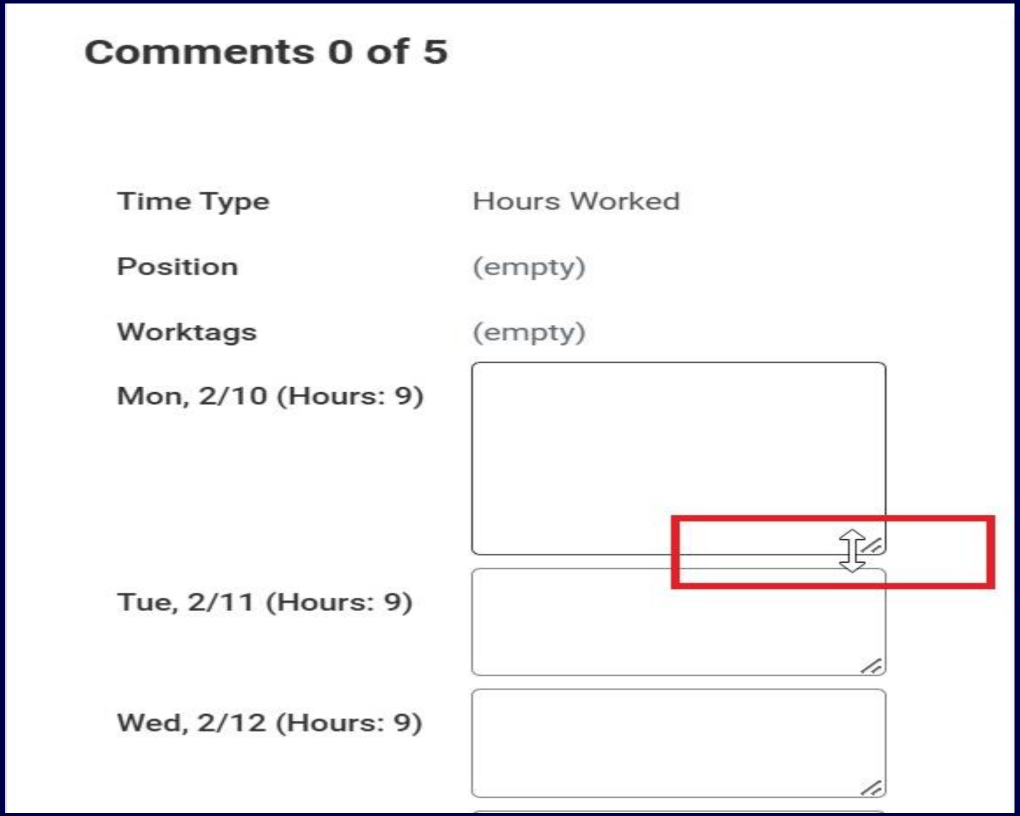
Enter Time by Type Comments

Impact Analysis

Before the release



After the release



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Time Entry Template Reporting

What’s changing

With this release, Workday includes an additional time entry template settings on the All-Time Entry Template Effective Dates report.

Additional considerations

Workday add these new columns to the All-Time Entry Template Effective Dates report so that you can review all time entry template settings in a single report:

- Copy Worktags for Breaks
- Enable Optional Out Times
- Main Totals
- Total
- Unit

What do I need to do

You don’t need to take action.

What happens if I do nothing

The report will be accessible from global search.

https://doc.workday.com/release-notes/en-us/time/8758781.html

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Time Entry Template Reporting, cont.

Additional considerations

- Label.
- Primary.
- Prevent Submission of Incomplete Time Blocks.
- Time Shift Options Maximum Duration for Out (Hours).
- Maximum Duration for Out (Minutes).
- Maximum Duration for Meal (Hours).
- Maximum Duration for Meal (Minutes).
- Maximum Duration for Break (Hours).
- Maximum Duration for Break (Minutes).
- Group Time Blocks for Shift Based On.
- Use Second Precision.

https://doc.workday.com/release-notes/en-us/time/8758781.html

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Time Entry Template Reporting

Impact analysis

Before the release	After the release
"All Time Entry Template Effective Dates" report had limitations in viewing fields associated with Time entry templates – effective dated.	Workday add these new columns to the All Time Entry Template Effective Dates report so that you can review all time entry template settings in a single report: • Copy Worktags for Breaks. • Enable Optional Out Times. • Main Totals (Total, Unit, Label, Primary). • Prevent Submission of Incomplete Time Blocks. • Time Shift Options Maximum Duration for Out (Hours) Maximum Duration for Out (Minutes) Maximum Duration for Meal (Hours) Maximum Duration for Meal (Minutes) Maximum Duration for Break (Hours) Maximum Duration for Break (Minutes) Group Time Blocks for Shift Based On • Use Second Precision.

Impact description
This makes it easier for time tracking administrators to review and analyze all effective-dated settings in a single report.

https://doc.workday.com/release-notes/en-us/time/8758781.html

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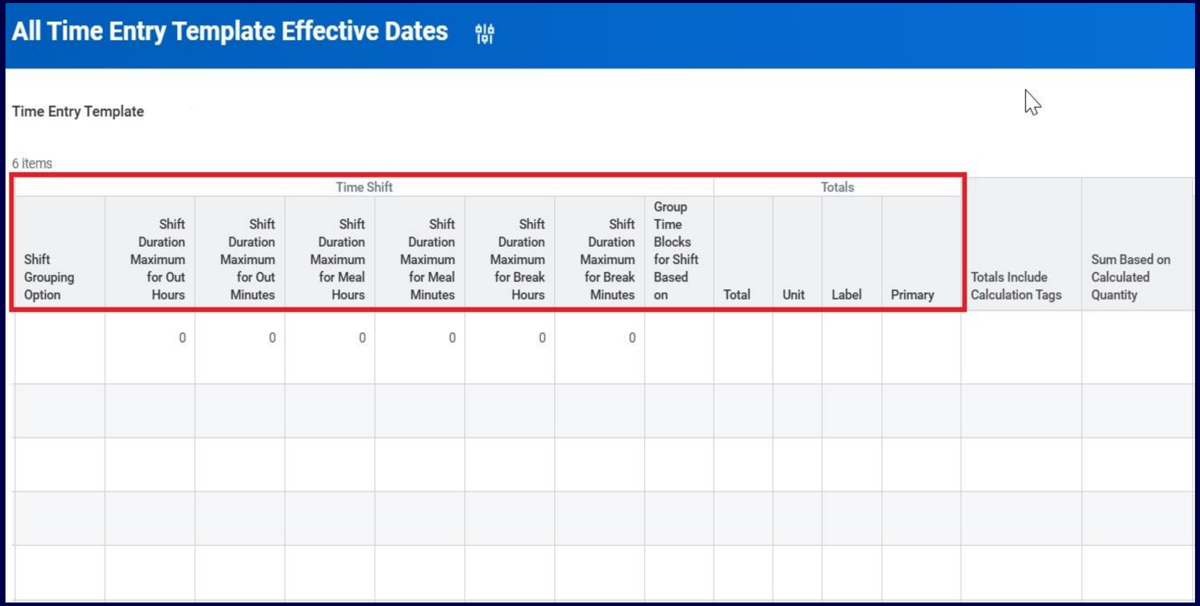
Time Entry Templates Reporting

Impact Analysis

Before the release

- N/A

After the release


All Time Entry Template Effective Dates

Time Entry Template

6 items

Time Shift								Totals					
Shift Grouping Option	Shift Duration Maximum for Out Hours	Shift Duration Maximum for Out Minutes	Shift Duration Maximum for Meal Hours	Shift Duration Maximum for Meal Minutes	Shift Duration Maximum for Break Hours	Shift Duration Maximum for Break Minutes	Group Time Blocks for Shift Based on	Total	Unit	Label	Primary	Totals Include Calculation Tags	Sum Based on Calculated Quantity
	0	0	0	0	0	0							

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Maintain Invalid Time Clock Events for Workers

What’s changing

With this release, managers can correct invalid time clock events that workers record on the Workday Time Kiosk during downtime or on third-party clocks.

What do I need to do

You must grant users access to these security domains to use the new Maintain Invalid Time Clock Events for Workers task:

- Maintain Time Clock Events for Worker.
- Worker Data: View/Edit Time Clock Events.

To display employee IDs on the Maintain Invalid Time Clock Events for Workers task, select the Show Reference ID and Employee ID check box when you access the task.

https://doc.workday.com/release-notes/en-us/time/8656435.html

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Maintain Invalid Time Clock Events for Workers, cont.

Additional considerations

Workday delivers a new Maintain Time Clock Events for Worker security domain (in the Time Tracking functional area) that you can use to secure manager access to the time clock events of their workers.

Workday also delivers the new Maintain Invalid Time Clock Events for Workers task (secured to the Maintain Time Clock Events for Worker domain in the Time Tracking functional area). This task enables managers to correct or ignore invalid time clock events for their direct reports.

What happens if I do nothing

There is no impact if you do nothing.

https://doc.workday.com/release-notes/en-us/time/8656435.html

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Maintain Invalid Time Clock Events for Workers

Impact analysis

Before the release	After the release
N/A	Maintain Invalid Time Clock Events for Workers task is now available.

Impact description
You can now correct or ignore invalid time clock events for workers using the Maintain Invalid Time Clock Events task.

https://doc.workday.com/release-notes/en-us/time/8656435.html

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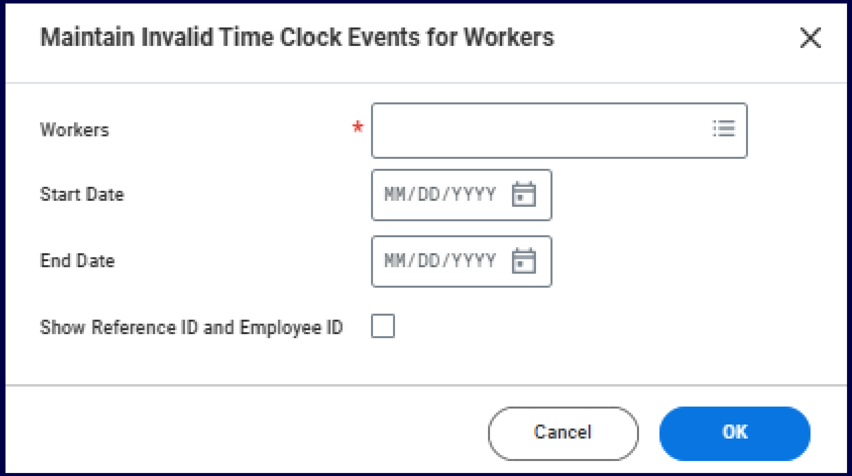
Maintain Invalid Time Clock Events for Workers

Impact analysis

Before the release

- N/A

After the release



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Automatically Submit Time Enhancements

What's changing

Workday enhances the Auto Submit Time feature to help you easily select a population to automatically submit time and to choose which periods to exclude.

Additional considerations

Workday add these fields to the Selection Criteria tab to support flexible selection of workers to automatically submit time:

- Organizations
  - Include Subordinate Organizations
- Job Profiles
- Worker Type
- Locations

What do I need to do

Review your existing Auto Submit Time schedules to identify and update any schedules.

What happens if I do nothing

Workday still displays the new fields and check boxes that are added to help you easily select a population to automatically submit time.

https://doc.workday.com/release-notes/en-us/time/8435136.html

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Automatically Submit Time Enhancements, cont.

Additional considerations

- Collective Agreement.
- Work Shifts.
- On Leave
  - Include
  - Exclude
  - On Leave Workers Only
- Workers Selection section - You can only select workers you have access to from this prompt.
- Exclude Current and Future Periods check box- To exclude a worker's current and future periods from being submitted automatically.

https://doc.workday.com/release-notes/en-us/time/8435136.html

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Automatically Submit Time Enhancements, cont.

Additional considerations

Reported Time Blocks for a Date Range Report

Workday adds the Worker Status column to the Reported Time Blocks for a Date Range report to help you automatically submit time for workers based on their employment status.

Auto Submit Time Fields

Workday renames these fields on the Auto Submit Time task for clarity:

- Auto Submit to Auto Submit Periods With.
- All Time to Any Unsubmitted Time.
- Imported Time to Any Imported Time.
- Imported Auto Submit Time to Imported Time With Auto Submit Value True

Workday also updates the description of Dynamic Range to correctly explain the Run Now frequency.

https://doc.workday.com/release-notes/en-us/time/8435136.html

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Automatically Submit Time Enhancements

Impact analysis

Before the release	After the release
The Auto Submit Time task only has the following: Selection Criteria: • Auto Submit (All Time, All Imported Time, or Imported Auto Submit Time) • Time Entry Template Dynamic Range: • Days Before Run Date • Days After Run Date	In addition to the existing ones, the Auto Submit Time task now has the following: Selection Criteria: • Organizations • Include Subordinate Organizations • Job Profiles • Worker Type • Locations • Collective Agreement • Work Shifts • On Leave (Include, Exclude, On Leave Workers Only) Worker Selection: • Workers Dynamic Range: • Exclude Current and Future Periods

Impact description
Improves how you can filter the Auto Submit Time task - now allowing to filter by workers and other worker criteria.

https://doc.workday.com/release-notes/en-us/time/8435136.html

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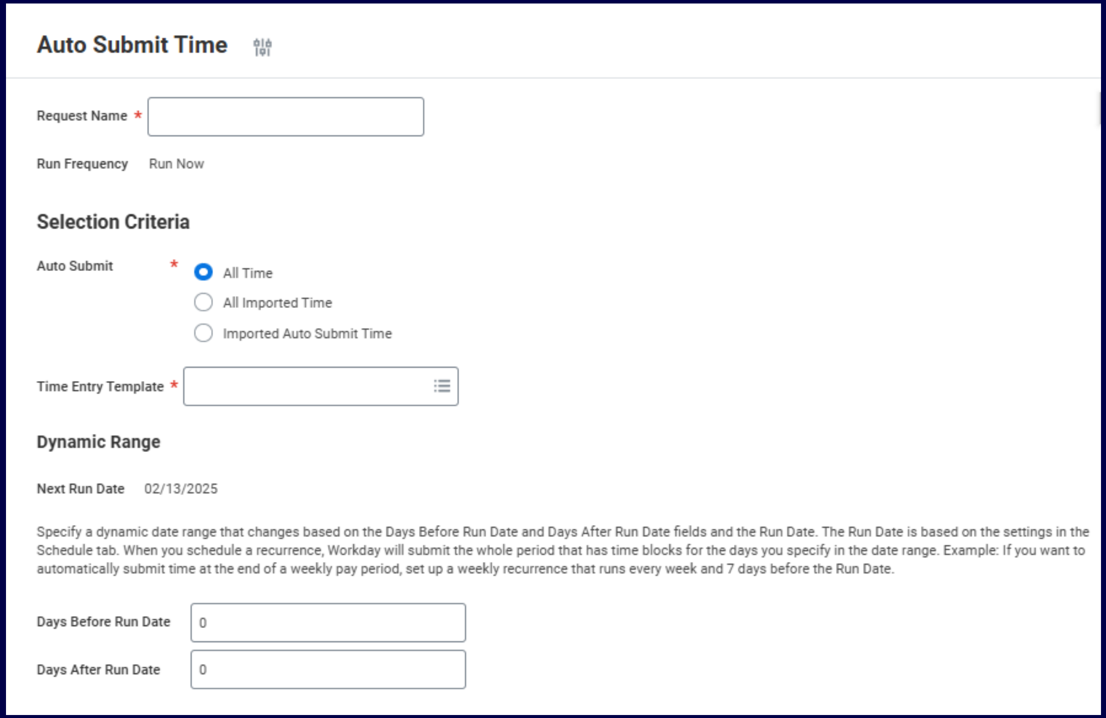
Automatically Submit Time Enhancements

Impact analysis

Before the release



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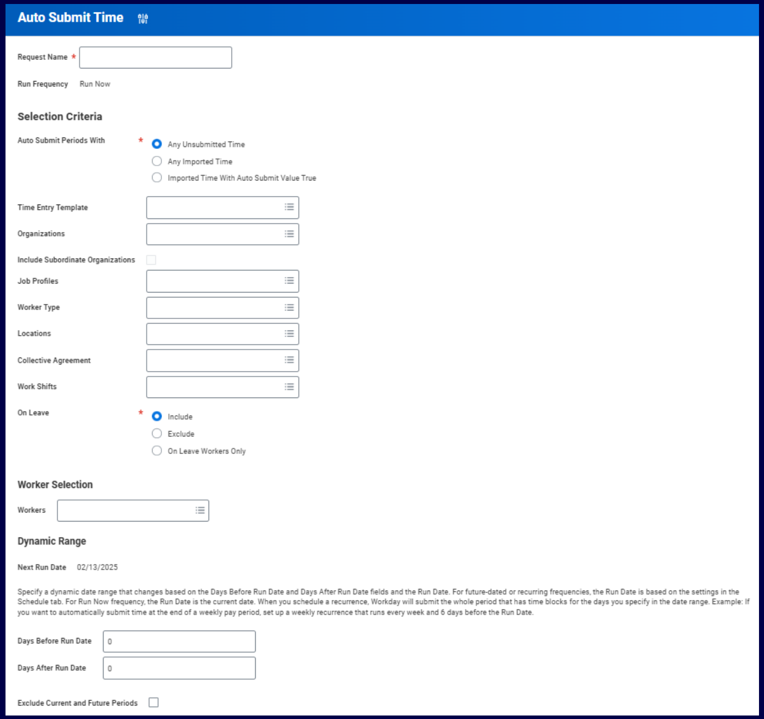

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Edit and Approve Time Filters

What's changing

With this release, workday add new filters that enable you to better control which workers to display on the Edit and Approve Time report.

Additional considerations

When you set up filters on the Edit Time Approval Template task, they now apply to the Edit and Approve Time report. This enables you to:

What do I need to do

If you don't yet have filters configured, use the Edit Time Approval Template task to configure them on the time approval templates you're using with these reports:

- Edit and Approve Time.
- Review Time .

What happens if I do nothing

If you already have worker filters configured in the Review Time report, these will now also automatically apply to the Edit and Approve Time report.

https://doc.workday.com/release-notes/en-us/time/8485287.html

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Edit and Approve Time Filters, cont.

Additional considerations

- Add these prompts that reviewers can use to refine the groups of workers to display on the report: Employee Type
    - Job Exempt Status.
    - Pay Rate Type.
    - Worker Type.
- Configure implicit filters that reviewers can’t modify.

https://doc.workday.com/release-notes/en-us/time/8485287.html

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Edit and Approve Time Filters

Impact analysis

Before the release	After the release
Edit and Approve Time report only has the following filters: • Date • Review (By Organization or By Worker) • Start Day of Week	In addition to the existing filters, the Edit and Approve Time report now has additional ones - ‘Filters Workers By’: • Worker Type • Employee Type • Pay Rate Type • Job Exempt Status (All Workers, Exempt, Non-Exempt)

Impact description
Improves how you can filter the Edit and Approve Time report - now allowing to filter by workers.

https://doc.workday.com/release-notes/en-us/time/8485287.html

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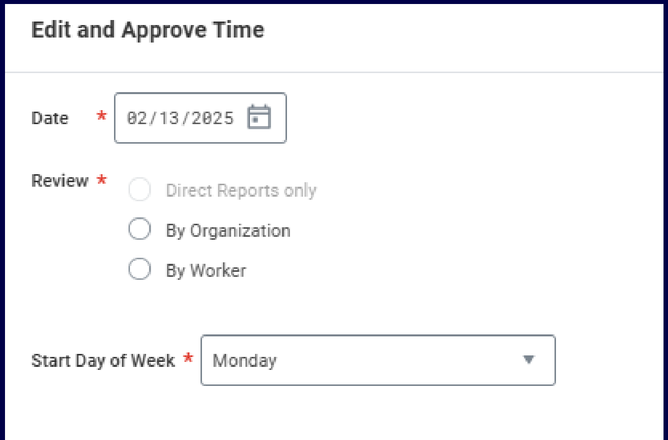
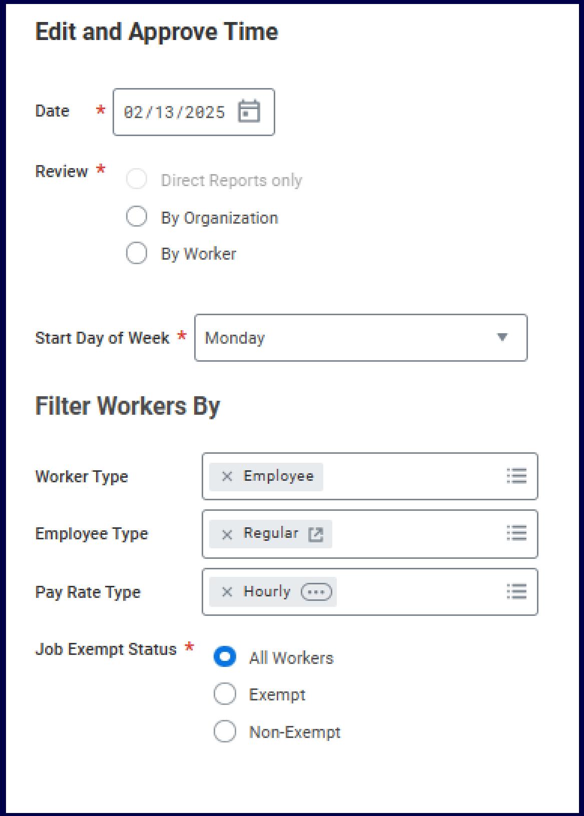
Edit and Approve Time Filters

Impact analysis

Before the release



After the release



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Effective-Dated Time Entry Templates

What's changing

With this release, you can apply effective dates to time entry templates to support changes in legislation, union agreements, or company policy, ensuring accurate time entries for workers.

You can also view current, past, and future effective-dated configurations to easily track changes over time.

This feature enables Time Tracking administrators to create effective-dated time entry template configurations for key Time Tracking elements that impact time calculations, totals, and time entry recording.

What do I need to do

You don't need to take action to enable this feature.

https://doc.workday.com/release-notes/en-us/time/7068921.html

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Effective-Dated Time Entry Templates, cont.

Additional considerations

Time Entry Template Changes

To support saving time entry template data with effective dates, workday update these tasks and reports:

- Create Time Entry Template.
- Edit Time Entry Template.
- View Time Entry Template.

Workday consolidates the time entry template tabs into these 2 new tabs:

- Effective-Dated: Contains fields and configuration options that are effective-dated and apply to all time entry methods.

What happens if I do nothing

Workday automatically delivers a conversion of your tenant's time entry templates. Workday add 1 effective-dated configuration to all time entry templates with an effective start date of 1930-01-01. You'll be able to change this date and any of the available configurations on the templates.

All Time Tracking business objects, report fields, and reports that are impacted by this change will automatically be available. You can view the impacted objects in their corresponding tasks and usage areas.

Going forward, Workday will include effective dates on all configuration changes to time entry templates.

https://doc.workday.com/release-notes/en-us/time/7068921.html

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Effective-Dated Time Entry Templates, cont.

Additional considerations

- Noneffective-Dated: Contains fields and configuration options that are not effective-dated and apply to transactions in the past, present, and future.

Fields in the header of the time entry template are not effective-dated.

The Effective-Dated tab contains:

- A new Effective Date field.
- A panel on the left where you can:
  - Choose effective dates that have data already configured.
  - Add new effective dates
- The Default Time Entry Code option.

What happens if I do nothing

For iLoad templates version 44 and later, you'll see new columns to support effective dating. For iLoad and web services, you can continue to use older versions.

When performing a Put transaction with an older version for an existing time entry template, the Put will update all noneffective-dated fields, the current effective-dated fields, and all future effective-dated fields.

When performing a Put with an older version for a time entry template that doesn’t already exist, the Put creates the time entry template with an effective date of 1930-01-01.

https://doc.workday.com/release-notes/en-us/time/7068921.html

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Effective-Dated Time Entry Templates, cont.

Additional considerations

- These sections and their configuration options:
  - Time Clock Event Matching.
  - Time Off Calculations.
  - Shift-Based Check-In.
  - System Meals and Breaks.
  - Time Entry Restrictions.
  - Worktags.
  - Business Process.
  - Time Shift.
  - Totals.
  - Eligibility.

What happens if I do nothing

Migration

You can’t migrate effective-dated time entry templates from:

- Preview tenants to Production tenants.
- Version 44 tenants to version 43 tenants.

If you try to migrate during the Preview window, the OX2.0 web service reverts to version 43 and doesn't support effective dating.

https://doc.workday.com/release-notes/en-us/time/7068921.html

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Effective-Dated Time Entry Templates, cont.

Additional considerations

Workday also adds a new Copy Effective-Dated Data button on the View Time Entry Template report that lets you copy effective-dated time entry template configurations.

Time Entry Template Eligibility

With this change, eligibility comes from the end of the week or from the specific day depending on the time entry method or task.

Time Tracking Tasks

Workday delivers a new Delete Time Entry Template Effective-Dated Data task (secured to the Set Up: Time Tracking domain in the Time Tracking and Time Tracking Hub functional areas) that you can use to delete data for multiple effective dates for a time entry template.

https://doc.workday.com/release-notes/en-us/time/7068921.html

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Effective-Dated Time Entry Templates, cont.

Additional considerations

Workday also adds a new Copy Time Entry Template task that you can access through the related actions menu of a time entry template. This enables you to create a new time entry template with a similar effective-dating and noneffective-dating configuration.

Financial Management Tasks

Workday updates these Financial Management tasks to respect and support effective-dated data from Time Tracking:

- Review Billable Project Transactions.
- Set Up Project Labor Cost Summary Configuration.
- Review Billable Usage-Based Transactions Reports.

https://doc.workday.com/release-notes/en-us/time/7068921.html

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Effective-Dated Time Entry Templates, cont.

Additional considerations

Reports

Workday delivers a new All Time Entry Template Effective Dates report (secured to the Set Up: Time Tracking domain in the Time Tracking and Time Tracking Hub functional areas) so that you can view all effective-dated configurations for all time entry templates in a single report.

Workday updates the All-Time Entry Templates report with a new:

- Effective Date prompt. When you don’t select a date, Workday uses the current date.
- Effective as of Date field that workday display only when you select an effective date.

https://doc.workday.com/release-notes/en-us/time/7068921.html

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Effective-Dated Time Entry Templates, cont.

Additional considerations

Workday updates the View Time Tracking Eligibility Rule report so that Workday appends the effective date to the eligibility rule name.

Workday also updates the Used By field on the All-Translation Condition Rules report to return the effective-dated time entry template that the condition rule is used in.

New and Updated Report Fields

Workday updates the Used By report field to support effective dating and return the appropriate value based on the effective date on the Condition Rule business object. Used By now returns time entry templates with the effective date appended to the existing report field name.

https://doc.workday.com/release-notes/en-us/time/7068921.html

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Effective-Dated Time Entry Templates, cont.

Additional considerations

Workday adds many new report fields and update many existing report fields that you can use in custom reports. See Attachments for a full list.

Web Services

Workday also update many existing web services. See Attachments for a full list.

Other Updates

Workday also updates many existing Time Tracking business processes, jobs, tasks, reports, report data sources, and worklets to respect and support effective dating. See Attachments for a full list.

https://doc.workday.com/release-notes/en-us/time/7068921.html

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Effective-Dated Time Entry Templates

Impact analysis

Before the release	After the release
You cannot add an effective date when creating and editing time entry templates.	Time Entry Template is now effective-dated.

Impact description
Time Entry Template is now effective-dated to ensure accurate time entries for workers. Current, past, and future effective-dated configurations can now be tracked over time.

https://doc.workday.com/release-notes/en-us/time/7068921.html

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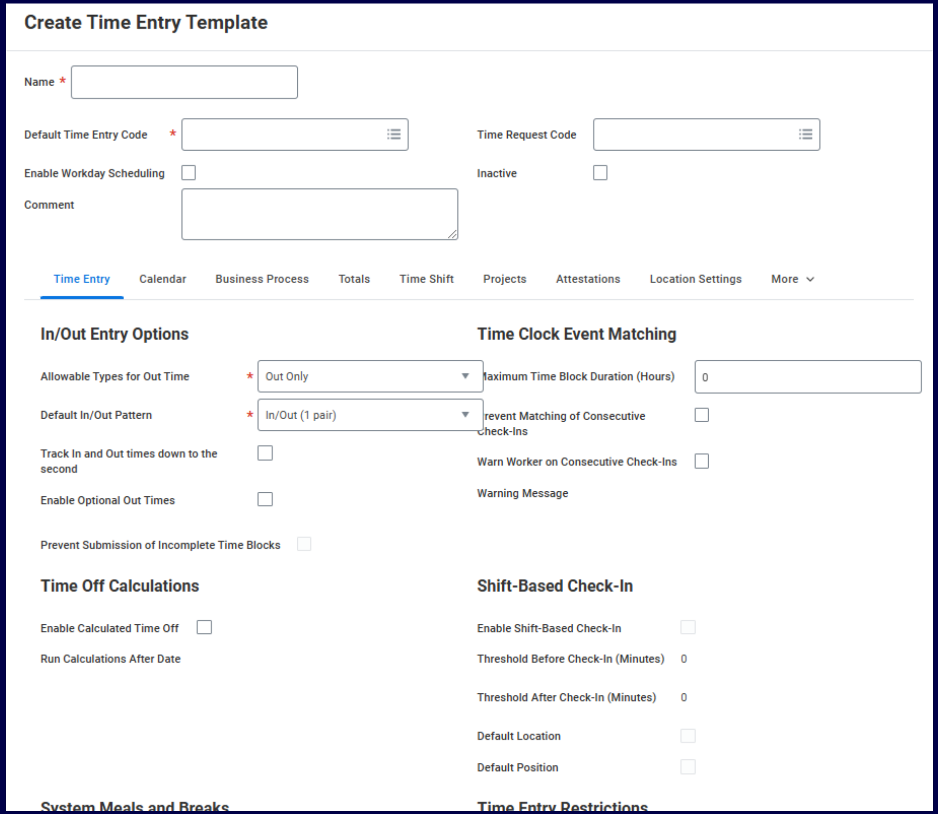
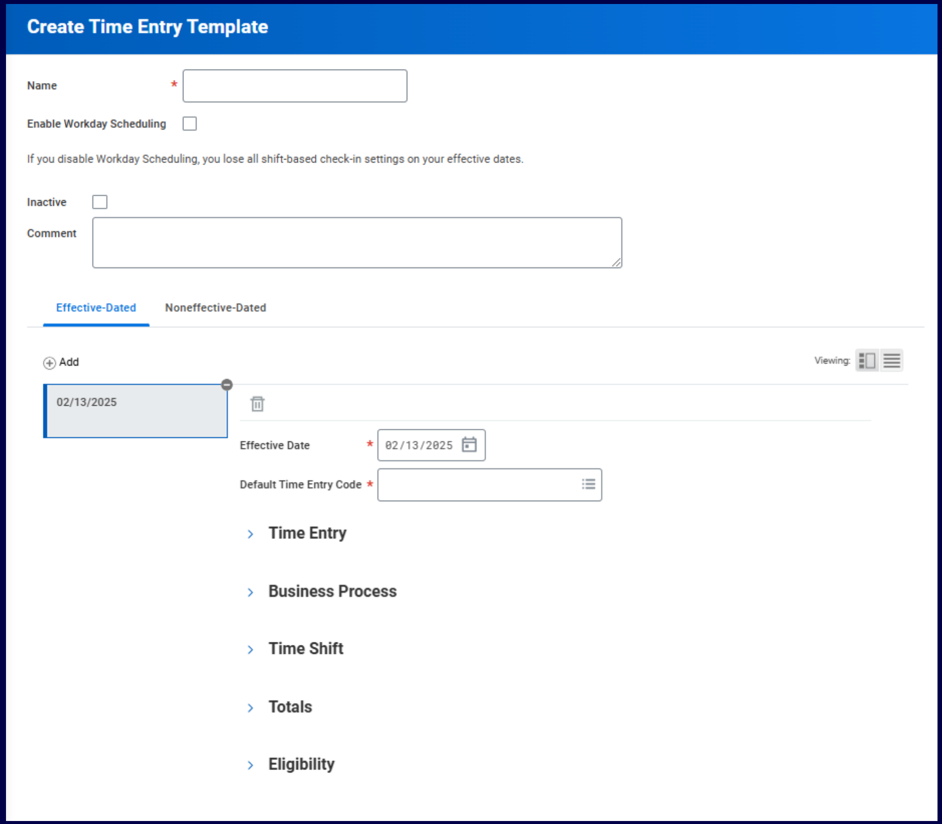
Effective-Dated Time Entry Templates

Impact analysis

Before the release



After the release



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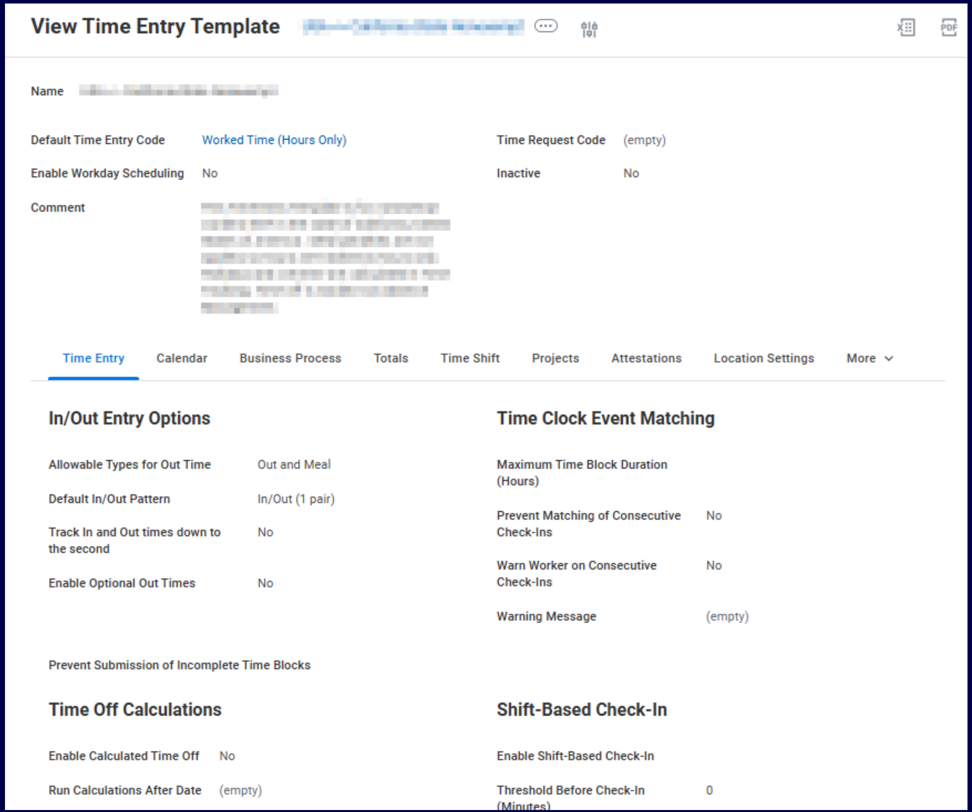
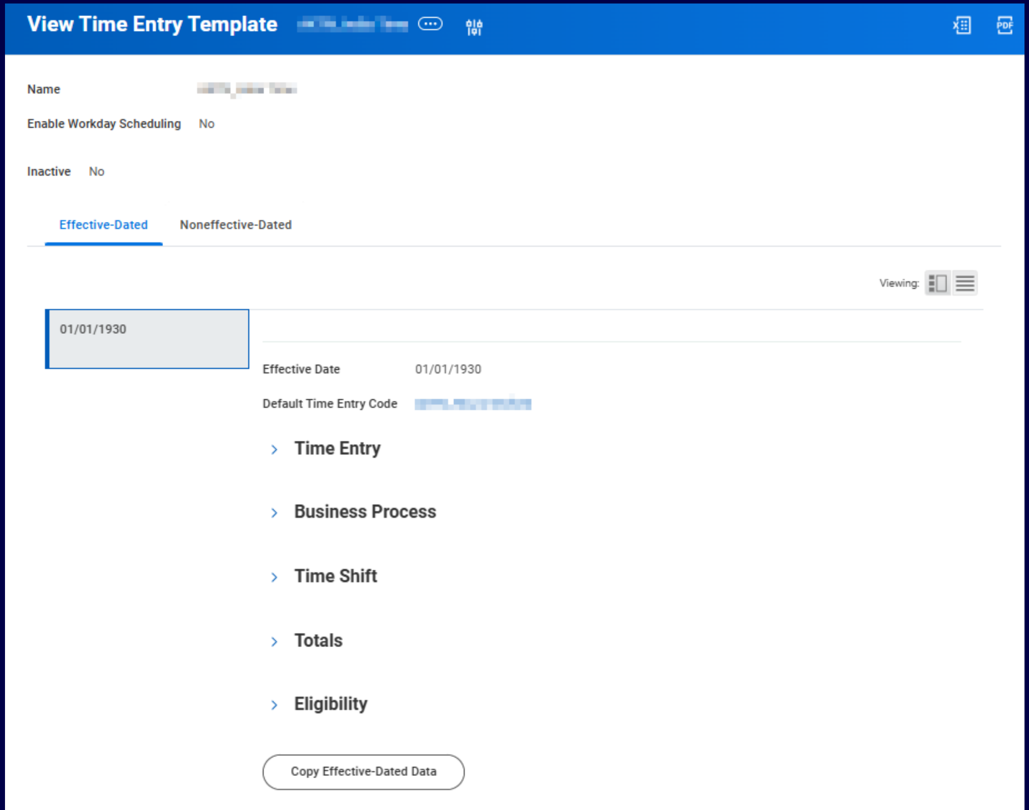
Effective-Dated Time Entry Templates

Impact analysis

Before the release



After the release



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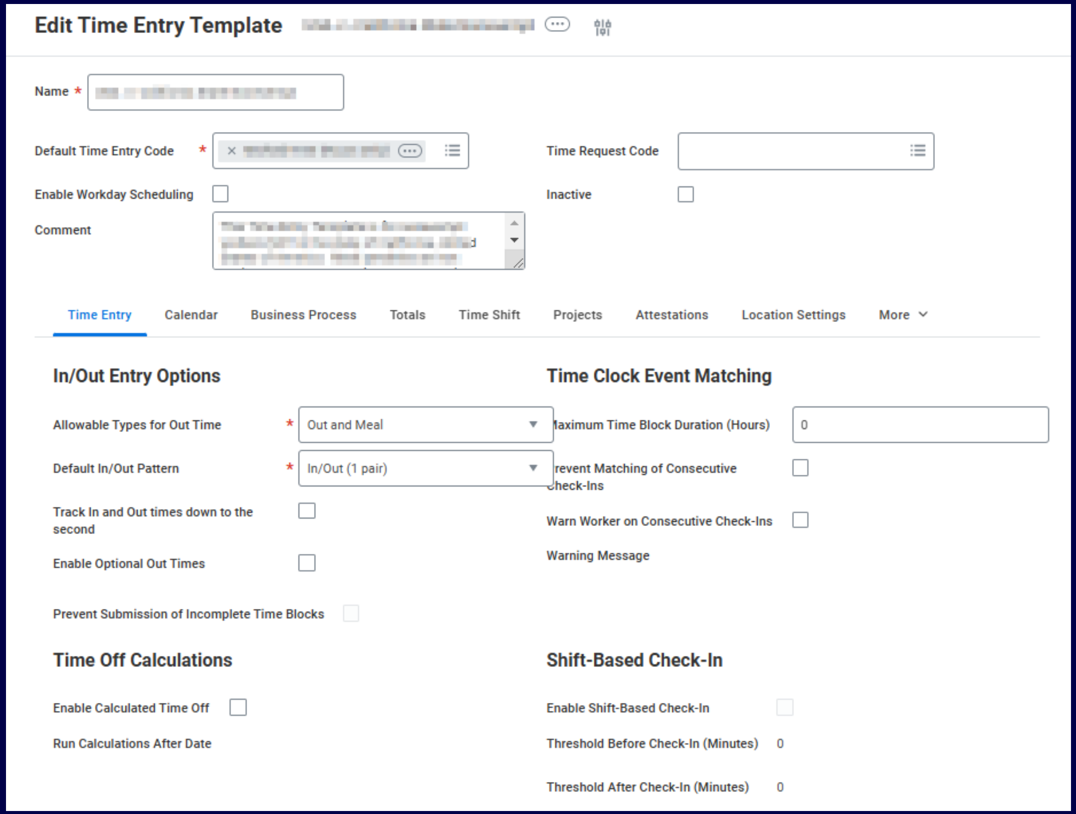
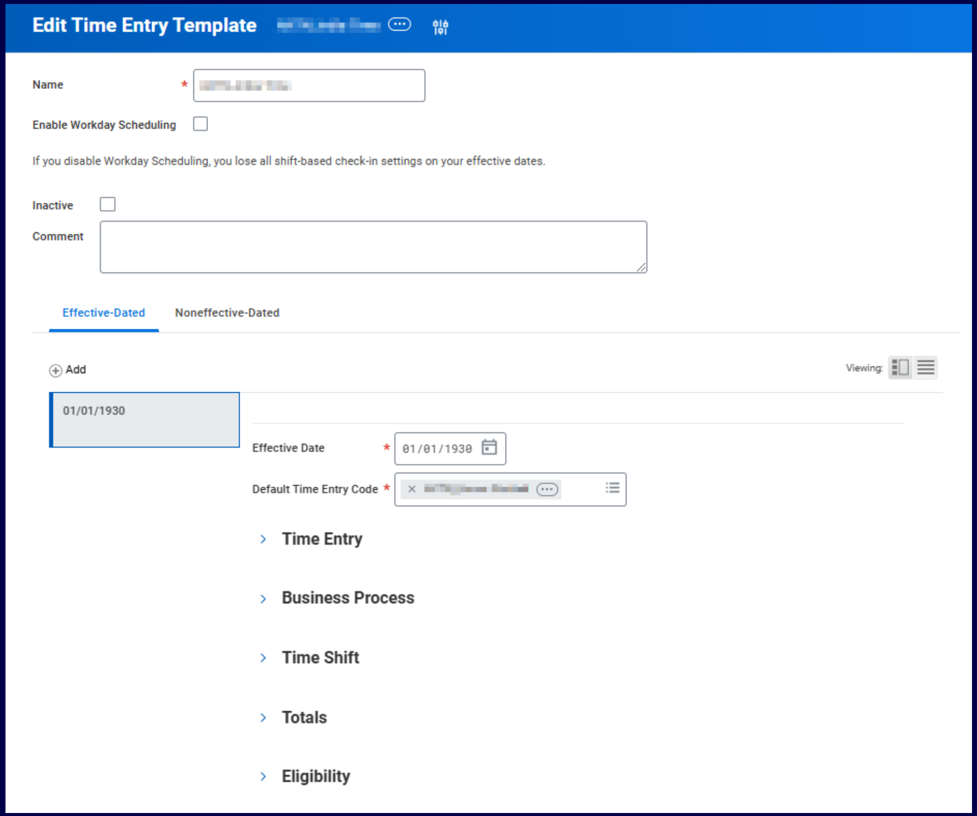
Effective-Dated Time Entry Templates

Impact analysis

Before the release



After the release



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Rename Request Overtime to Time Requests

What's changing

With 2025R1, Workday renames Request Overtime to Time Requests to align with enhancements and additional functionality.

This feature provides an improved experience to support any time requests that require preapproval.

Workers can:

- Request in advance the number of hours they want to work for any duration, ranging from a day up to a month.
- Select from multiple time request codes that they're eligible for when they request time.

What do I need to do

This feature is automatically available.

If you've already configured and are using Request Overtime:

1. Confirm that the automatic conversion aligns with your organization's needs. For more information, review the Automatic Conversion section in the Changes section of this Release Note. You can keep and rename the Workday-created time code group, or you can move the time request code to an existing time code group and delete the one that Workday created.
    - Consolidate or fill out the remaining fields on the time code group as needed.

https://doc.workday.com/release-notes/en-us/timecore/7801014.html

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Rename Request Overtime to Time Requests, cont.

What’s changing

Managers can:

- Easily ensure that team members dedicate a certain number of hours to definite tasks with a specific time request code.
- Approve time requests for multiple workers.
- Enter a date range of up to 3 months when they run reports to view time requests.

Administrators can:

- Request time in advance for multiple workers.
- Approve time requests for a group of workers.

What do I need to do

2. Configure any additional time request codes.
    - Add any validations for the time request codes.
    - Add time request codes to the time code group.
3. Request time by clicking New Request on the My Team’s Time Requests or Time Requests report.
4. (Optional) Load bulk time requests through the Put Time Requests EIB.
5. Review and approve time requests from the Review and Approve Time Requests report.
6. Report on time requests to track time requested compared to time worked using the report fields on these business objects: Requested and Worked Time Pairing, Time Day, Time Request Code, Time Request Event, and Time Week.

https://doc.workday.com/release-notes/en-us/timecore/7801014.html

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Rename Request Overtime to Time Requests, cont.

Additional considerations

Rename Request Overtime to Time Requests

Workday rename Request Overtime to Time Requests. Workday also rename any references to Request Overtime to Time Requests throughout the tenant, such as in headers, labels, and text. In addition, workday rename the objects listed in the attached Excel spreadsheet.

Time Request Codes Prompt and Tasks

Workday remove the Overtime Request Code prompt from these tasks:

- Create Time Entry Template.
- Delete Time Entry Template.
- Edit Time Entry Template.

What do I need to do

If you haven't previously configured to use Request Overtime:

1. Create time request codes for any type of time that requires preapproval.
   - Add any validations for the time request codes.
   - Add time request codes to a time code group.
2. Configure the Time Request business process.
3. Request time by clicking New Request on the My Team's Time Requests or Time Requests report.
4. (Optional) Load bulk time requests through the Put Time Requests EIB.
5. Review and approve time requests from the Review and Approve Time Requests report.

https://doc.workday.com/release-notes/en-us/timecore/7801014.html

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Rename Request Overtime to Time Requests, cont.

Additional considerations

Workday rename the Overtime Request Code prompt to Time Request Codes and add it on the Time Entry Codes tab on these tasks:

- Create Time Code Group.
- Delete Time Code Group.
- Edit Time Code Group.

You can select multiple codes from the Time Request Codes prompt.

Workday make these changes to the Create Time Request Code, Delete Time Request Code, and Edit Time Request Code tasks:

- Add a new Groups tab to display the time code groups that the time request code belongs to.

What do I need to do

6. Report on time requests to track time requested compared to time worked using the report fields on these business objects: Requested and Worked Time Pairing, Time Day, Time Request Code, Time Request Event, and Time Week.

Additional Considerations

The validations configured on the time request code aren't effective dated. Any changes to the validations are in real time. If you make any changes to the validation configuration, and a worker edits a submitted time request, that time request is subject to the configured validations at that time.

https://doc.workday.com/release-notes/en-us/timecore/7801014.html

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Rename Request Overtime to Time Requests, cont.

Additional considerations

- Add a new Validations tab for you to configure validations for the time request code, including the severity level of the validation, and customizing error messages. You can also allow time requests to cross the week breaker and require that a comment is needed when users submit time requests.

Workday update the iLoad templates for time request code and time code groups to support the new setup and validations.

What do I need to do

In/out time requests can't overlap one another. Also, hours only time requests can't overlap one another. However, in/out time requests can overlap with hours only time requests.

What happens if I do nothing

- You'll see that any references to Request Overtime prior to this feature release are renamed to Time Requests throughout the tenant, such as in headers, labels, and text.
- The overtime request code now links to a time code group. Workday moves any overtime request code that is associated with the time entry template to a time code group.

https://doc.workday.com/release-notes/en-us/timecore/7801014.html

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Rename Request Overtime to Time Requests, cont.

Additional considerations

Requesting Time

You can now request time for up to a month at once. To request time, access the My Team’s Time Requests report or the Time Requests report and click New Request. These reports can be accessed from the:

- Actions menu on the time entry calendar.
- Team Time worklet.
- Time worklet.
- Time and Absence related actions of the worker's profile.

What happens if I do nothing

If you had a time entry template with an overtime request code that used the same time tracking eligibility rule as a time code group, Workday moves the overtime request code to that time code group for you.

If Workday is unable to match the time tracking eligibility rule for the time entry template and time code group, Workday creates a new time code group with the overtime request code. The names of the Workday-created time code groups are in this format: [Overtime Request Code name] for [Eligibility Rule Name] - Workday created. To find the new time code group, run the All Time Code Groups or View Time Code Group report.

https://doc.workday.com/release-notes/en-us/timecore/7801014.html

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Rename Request Overtime to Time Requests, cont.

Additional considerations

For consistency, workday enhance the layout of the fields when you request time for in/out and hours only.

Approving Time Requests

Workday add a new Time Requests section on the time entry approval My Tasks item, enabling managers to view the worker's time requests and reconcile the time requested against the time worked.

Workday also deliver a new Review and Approve Time Requests report (secured to the Worker Data: My Team's Overtime domain), enabling you to mass approve time requests within the selected date range for multiple workers.

What happens if I do nothing

You can keep and rename the Workday-created time code group, or you can move the time request code to an existing time code group and delete the one that Workday created.

https://doc.workday.com/release-notes/en-us/timecore/7801014.html

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Rename Request Overtime to Time Requests, cont.

Additional considerations

Time Requests on Time Entry Calendar

For hours only requests of a long duration, workday now display time requests:

- On the start date of the request, the end date of the request, and every 7 days in between in a weekly calendar view.
- As 1 continuous band for the duration of the request in a monthly calendar view.

My Team's Time Requests and Time Requests Reports

Workday deliver a new date range prompt on the My Team's Time Requests and Time Requests reports. You can enter a date range that is less than or equal to 3 months, allowing you to view time request details for historical and future dates.

https://doc.workday.com/release-notes/en-us/timecore/7801014.html

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Rename Request Overtime to Time Requests, cont.

Additional considerations

Workday also deliver a new Workers prompt on the My Team's Time Requests report, enabling you to view details of 1 or more workers' time requests within the selected date range.

Workday consolidate the output on both the Upcoming Overtime Requests and Past Overtime Requests tabs into 1 page with these columns:

- Worker (only for the My Team's Time Requests report).
- Position (only for the My Team's Time Requests report).
- Time Request Code.
- Start Date.

https://doc.workday.com/release-notes/en-us/timecore/7801014.html

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Rename Request Overtime to Time Requests, cont.

Additional considerations

- End Date.
- Start Time.
- End Time.
- Total Hours.
- Calculated columns:
  - Requested Time Start for a Day.
  - Requested Time End for a Day.
  - Worked Time.
- Attachment(s).
- Status.

https://doc.workday.com/release-notes/en-us/timecore/7801014.html

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Rename Request Overtime to Time Requests, cont.

Additional considerations

The Calculated columns display any time requests that require approval once the approvals are completed, and time is entered.

Workday now display these fields on the time request block, enabling you to confirm the details before you delete the time request from either the My Team's Time Requests or Time Requests report:

- Worker (only for the My Team's Time Requests report).
- Time Request Code .
- Total Hours .
- Status.

https://doc.workday.com/release-notes/en-us/timecore/7801014.html

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Rename Request Overtime to Time Requests, cont.

Additional considerations

The Worktag for Time Request report field on the new Time Request Code Worktag Joiner business object (secured to the Set Up: Time Tracking domain) enables you to identify the worktag that is associated with the time request.

On the Time Request Event business object (secured to the Reports: Time Tracking, Self-Service: Time Calendar, and Worker Data: Time Calendar domains), these report fields enable you to identify the time request block for the time request event and to view details of the time request event:

- Time Request Block.
- Time Request Event.

https://doc.workday.com/release-notes/en-us/timecore/7801014.html

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Rename Request Overtime to Time Requests, cont.

Additional considerations

The All Time Requests for a Day report field on the Time Day business object (secured to the Reports: Time Tracking, Self-Service: Time Calendar, and Worker Data: Time Calendar domains) enables you to identify all time requests in a calendar day. This report field doesn't return time requests that span multiple days.

Security Domain

Workday deliver a new Process: Import Time Requests domain (secured to the Time Tracking and Time Tracking Hub functional areas) that you can use to import time requests using the Time Request business process.

https://doc.workday.com/release-notes/en-us/timecore/7801014.html

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Rename Request Overtime to Time Requests, cont.

Additional considerations

Put Time Requests EIB

Workday deliver a new Put Time Requests EIB (secured to the new Process: Import Time Requests domain) that enables you to mass load time requests into Workday. Time requests loaded through the web service follow the same routing defined on the business process.

Automatic Conversion

The overtime request code is no longer linked to a time entry template, but to a time code group. Workday runs a conversion in the background to move any overtime request code that is associated with the time entry template to a time code group.

https://doc.workday.com/release-notes/en-us/timecore/7801014.html

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Rename Request Overtime to Time Requests, cont.

Additional considerations

If you had a time entry template with an overtime request code that used the same time tracking eligibility rule as a time code group, Workday moves the overtime request code to that time code group for you.

If Workday is unable to match the time tracking eligibility rule for the time entry template and time code group, Workday creates a new time code group with the overtime request code. Workday uses this naming convention for the time code groups: [Overtime Request Code name] for [Eligibility Rule Name] - Workday created.

https://doc.workday.com/release-notes/en-us/timecore/7801014.html

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Setup required

Rename Request Overtime to Time Requests

Impact analysis

Before the release	After the release
The task is called Request Overtime.	This feature provides an improved experience to support any time requests that require preapproval. Workers can: • Request in advance the number of hours they want to work for any duration, ranging from a day up to a month. • Select from multiple time request codes that they're eligible for when they request time. Managers can: • Easily ensure that team members dedicate a certain number of hours to definite tasks with a specific time request code. • Approve time requests for multiple workers. • Enter a date range of up to 3 months when they run reports to view time requests. Administrators can: • Request time in advance for multiple workers. • Approve time requests for a group of workers. Request Overtime is now called Time Requests

Impact description
Improved experience with time requests requiring preapproval. You will now Time Requests instead of Request Overtime in all relevant tasks and objects.

https://doc.workday.com/release-notes/en-us/finrev/8380733.html

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Setup required

Transfer Project Time Blocks within Closed Time Entry Periods

What's changing

Workday now enable you to transfer time blocks within closed time entry periods without triggering time calculations or retroactive payroll calculations to run.

This feature enables you to:

- Move time blocks to a different project in a closed period, supporting updates in billing without impacting payroll.
- Maintain work in progress for long periods, and then transfer associated time blocks to other projects.
- Recoup billable hours.

What do I need to do

1. Access the Set Up Project Billing Configuration task.
2. On the Project Transfer Options tab, select the Allow Transfers Within Closed Time Entry Periods check box.
3. Identify time blocks that need to be moved to another project in a closed period.
4. Transfer the identified time blocks to another project through these supported tasks: Transfer Project Transactions or Manage Project Billing Transactions.

https://doc.workday.com/release-notes/en-us/finrev/8380733.html

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Transfer Project Time Blocks within Closed Time Entry Periods, cont.

Additional considerations

Allow Project Transfer in Closed Periods Option

Workday add a new, tenant-wide Allow Transfers Within Closed Time Entry Periods check box on the Project Transfer Options tab on the Set Up Project Billing Configuration task.

When you select the option and have access to the Transfer Project Transactions task (secured to the Manage: Project Transaction Transfer subdomain under the parent Manage: Project domain), you can transfer time block transactions with dates that are in a closed time period to another project task.

What do I need to do

Additional Considerations

• If time entry validations are triggered by the project transfer in a closed period, the validations prevent the project transfer from being completed.

• If you reopen the period, and make changes to the transferred time block or other time blocks in the period, all time blocks, including the transferred time block, are picked up in the next retroactive time calculation for the period.

• There is no change to the existing behavior of project transfers in open periods.

• If there are retroactive payroll triggering events prior to the project transfer time block event, the project transfer occurs and recalculates payroll.

https://doc.workday.com/release-notes/en-us/finrev/8380733.html

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Transfer Project Time Blocks within Closed Time Entry Periods, cont.

Additional considerations

Time Blocks

Workday add a new Project Transferred in Closed Period field on the time block, enabling you to easily identify if the project time block is transferred during a closed time entry period.

When it is, the field displays with a Yes value. Otherwise, the field isn't displayed.

Also, on the History tab of the time block, the Time Type column displays the project plan tasks that the time block was transferred from and to.

What do I need to do

- Time blocks in locked periods behave the same as today, requiring user access to the Time Tracking: Exempt from Lockout domain.

https://doc.workday.com/release-notes/en-us/finrev/8380733.html

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Transfer Project Time Blocks within Closed Time Entry Periods, cont.

Additional considerations

Reporting

Workday deliver a new Project Transferred in Closed Period report field on these business objects (secured to the Reports: Time Tracking domain), which enables you to identify the time blocks that were transferred in a closed time entry period:

- Time Block
- Time Review Event

Workday also add a new entry to the Time Block Changes column on the standard Time Block Audit report, enabling you to identify that the project or project plan task was updated, either as a result of a project transfer or because it was edited by a user. In these cases, the column displays with Updated: Time Type.

What happens if I do nothing

If you choose to do nothing, you won’t be able to transfer time blocks within closed time entry periods. You’ll see no change to project time blocks transferred in open time entry periods.

https://doc.workday.com/release-notes/en-us/finrev/8380733.html

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Transfer Project Time Blocks within Closed Time Entry Periods, cont.

Additional considerations

Retroactive Payroll

Time blocks transferred in closed periods don’t trigger retroactive payroll calculations. If there are retroactive payroll triggering events prior to the project transfer time block event, the project transfer occurs and recalculates payroll.

https://doc.workday.com/release-notes/en-us/finrev/8380733.html

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Setup required

Transfer Project Time Blocks within Closed Time Entry Periods

Impact analysis

Before the release	After the release
Before the release, workday were unable to transfer project time blocks to a closed time entry period.	After the release, enables to transfer time blocks within closed time entry periods without triggering retroactive payroll calculations or resulting in time calculations to run.

Impact description
Able to transfer time blocks within closed time entry periods and there is no change to project time blocks transferred in open time entry periods.

https://doc.workday.com/release-notes/en-us/finrev/8380733.html

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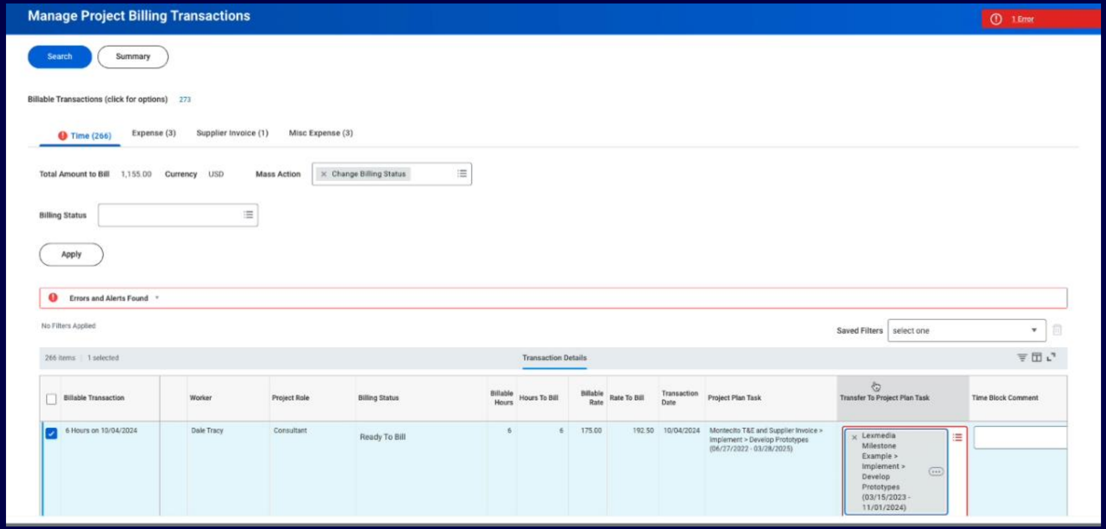
Setup required

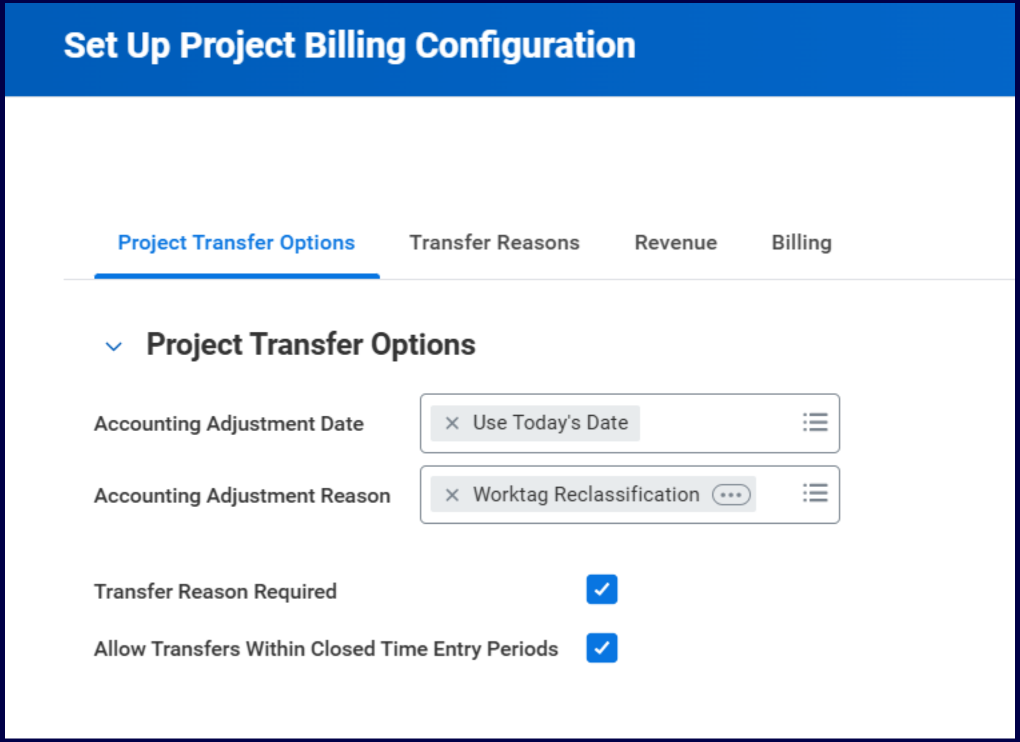
Transfer Project Time Blocks within Closed Time Entry Periods

Impact analysis

Before the release



After the release



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Setup required

Intelligent Prompt Recommendations for Time Entry

What's changing

Workday provides intelligent prompt recommendations on time type selections. Your users can now select recommended prompt values that are frequently used by your organization to expedite entering time.

Enabling prompt recommendations helps improve accuracy and efficiency in entering time.

Additional considerations

Maintain Machine Learning Prompt Recommendations Task.

Workday provide a new Time Tracking section on the Maintain Machine Learning Prompt Recommendations task that you can use to hide or show the time type prompt recommendations to your users when they select a time type.

What do I need to do

You can enable recommendations for the Time Type prompt for each time entry method by selecting the Time Type check box in the Time Tracking section on the Maintain Machine Learning Prompt Recommendations task (secured to the Set Up: Time Tracking domain).

Note: After you complete the configurations, Workday requires up to 2 weeks to train the intelligent models and display the prompt recommendations in your tenant. Workday automatically refines the models weekly to improve the accuracy of the recommendations.

What happens if I do nothing

Your users won't receive prompt recommendations on time type.

https://doc.workday.com/release-notes/en-us/time/8479916.html

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Intelligent Prompt Recommendations for Time Entry, cont.

Additional considerations

Workday also secure the Maintain Machine Learning Prompt Recommendations task to the Set up: Time Tracking domain.

Recommended Prompt Filter for Time Type

You can now configure Workday to display machine learning recommendations on the Time Type prompt on these tasks:

- Check In.
- Edit and Approve Time.
- Enter Time by Type.
- Enter Time by Week.

https://doc.workday.com/release-notes/en-us/time/8479916.html

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Intelligent Prompt Recommendations for Time Entry, cont.

Additional considerations

- Time Block Micro Edit.
- Quick Add.
- Workday displays recommendations based on the most recently used and most frequently used selections on the prompts.

https://doc.workday.com/release-notes/en-us/time/8479916.html

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Setup required

Intelligent Prompt Recommendations for Time Entry

Impact analysis

Before the release	After the release
Before the release, workday were unable to transfer project time blocks to a closed time entry period.	After the release, enables to transfer time blocks within closed time entry periods without triggering retroactive payroll calculations or resulting in time calculations to run.

Impact description
Able to transfer time blocks within closed time entry periods and there is no change to project time blocks transferred in open time entry periods.

https://doc.workday.com/release-notes/en-us/finrev/8380733.html

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Setup required

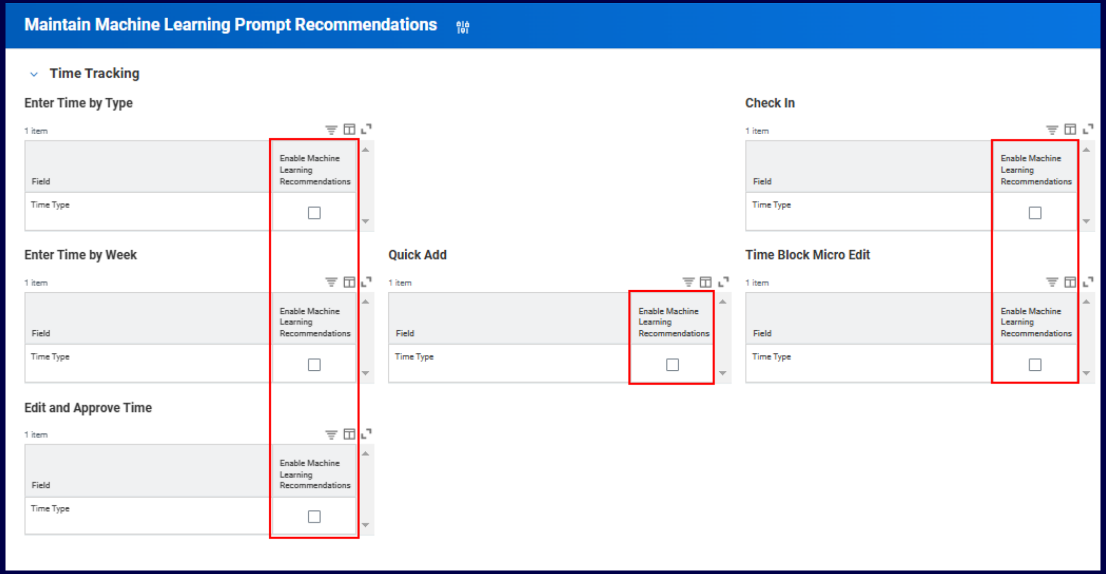
Intelligent Prompt Recommendations for Time Entry

Impact analysis

Before the release

- N/A

After the release



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Setup required

Workday Time Kiosk

What's changing

With the new Workday Time Kiosk app, Time Tracking customers can enable workers to check in and out on an iPad kiosk.

Workers can check in and out at a central location without needing to use a personal mobile device. This simplifies time recording when your workers don't all own mobile devices or don't have the Workday app.

The Time Kiosk also provides a reliable backup option for time recording during unforeseen circumstances. It's available during Workday scheduled downtime so that workers can record time whenever they work.

This feature supports multiposition workers.

What do I need to do

See attachment on the Workday community article for the instructions.

https://doc.workday.com/release-notes/en-us/time/8533365.html

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Workday Time Kiosk, cont.

Additional considerations

Workday deliver the new Workday Time Kiosk app that you can install on an iPad. Workers can enter their IDs to check in and out on the app. Check-ins and check-outs flow to Workday as time clock events.

The Workday Time Kiosk supports these languages:

- English (United States).
- French (Canada).

What happens if I do nothing

You won't see any changes to Workday if you don't enable this feature.

https://doc.workday.com/release-notes/en-us/time/8533365.html

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Setup required

Workday Time Kiosk

Impact analysis

Before the release	After the release
Workers need to use a personal mobile device to check in and out.	Customers can enable workers to check in and out on an iPad kiosk.

Impact description
Workers can be enabled to check in and out without using their personal mobile device.

https://doc.workday.com/release-notes/en-us/time/8533365.html

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Setup required

Flexible Check-In and Check-Out

What's changing

With this release, you can configure custom thresholds around check-in and check-out times within which your workers can adjust their time entries.

Additional Considerations

Workday add a new Worker Edits for Check In and Check Out Tasks section to the time entry template on the Effective-Dated tab, in the Time Entry section that enables workers to edit the times when they check in and check out.

What do I need to do

- On the Edit Time Entry Template task, in the Worker Edits for Check In and Check Out Tasks section, enable the applicable options.
- On the Edit Tenant Setup - HCM task, in the Time Tracking section, select the Enable Standard Mobile Check-In check box.

What happens if I do nothing

You will see no changes in Workday if you don't enable this feature.

https://doc.workday.com/release-notes/en-us/time/8097275.html

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Flexible Check-In and Check-Out, cont.

Additional Considerations

The new section contains these options:

- In Time.
- Out Time.
- Out Time (Break).
- Out Time (Meal).
- Threshold Before Check-In (Minutes) .
- Threshold Before Check-Out (Minutes).
- Threshold After Check-In (Minutes).
- Threshold After Check-Out (Minutes).

When you enable flexible check-in and check-out, workers can change the date and time on these tasks within the threshold you configure:

https://doc.workday.com/release-notes/en-us/time/8097275.html

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Flexible Check-In and Check-Out, cont.

Additional Considerations

- On desktop: Check In.
- Check Out.
- Check Out (Break).
- Check Out (Meal).
- On mobile devices: Check In
- Check Out

You can set thresholds values from 0 to 120 minutes.

Workday deliver these new report fields on the Time Entry Template business object (secured to the Set Up: Time Tracking domain) that enable you to verify your time entry template setup on the All Time Entry Templates report:

https://doc.workday.com/release-notes/en-us/time/8097275.html

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Flexible Check-In and Check-Out, cont.

Additional Considerations

- Allow Flexible In Time.
- Allow Flexible Out Time.
- Allow Flexible Out Time for Break.
- Allow Flexible Out Time for Meal.
- Flexible Threshold After Check-In (Minutes).
- Flexible Threshold After Check-Out (Minutes).
- Flexible Threshold Before Check-In (Minutes).
- Flexible Threshold Before Check-Out (Minutes).

Workday deliver these new report fields on the Time Clock

Event business object (secured to the Reports: Time Tracking, Self Service: Time Calendar, and Worker Data: Time Calendar domains) that you can use in your custom reports:

https://doc.workday.com/release-notes/en-us/time/8097275.html

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Flexible Check-In and Check-Out, cont.

Additional Considerations

- Date or Time Modified by Worker.
- System Default Time.

Workday update these web services to support migrating flexible check-in and check-out configurations via OX2.0 or iLoad:

- Get Time Entry Template.
- Put Time Entry Template.

Note:

- This feature only applies to the check-in and check-out time entry methods.
- If Flexible Check-In and Check-Out is enabled, then you can't enable Shift-Based Check-In ,Geofences By Scheduled Shift Location.

https://doc.workday.com/release-notes/en-us/time/8097275.html

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Setup required

Flexible Check-In and Check-Out

Impact analysis

Before the release	After the release
Before the release, workday were unable to configure custom thresholds around check-in and check-out times within which the workers can adjust their time entries.	After the release, Workday can configure custom thresholds around check-in and check-out times within which the workers can adjust their time entries.

Impact description
This enables workers to record their hours with precision, even when there are delays between arriving at work and checking in or between checking out and leaving. You will now have the data you need to pay employees for all their worked time so that you can meet compliance requirements. This feature also saves time for managers and administrators who no longer have to make adjustments.

https://doc.workday.com/release-notes/en-us/time/8097275.html

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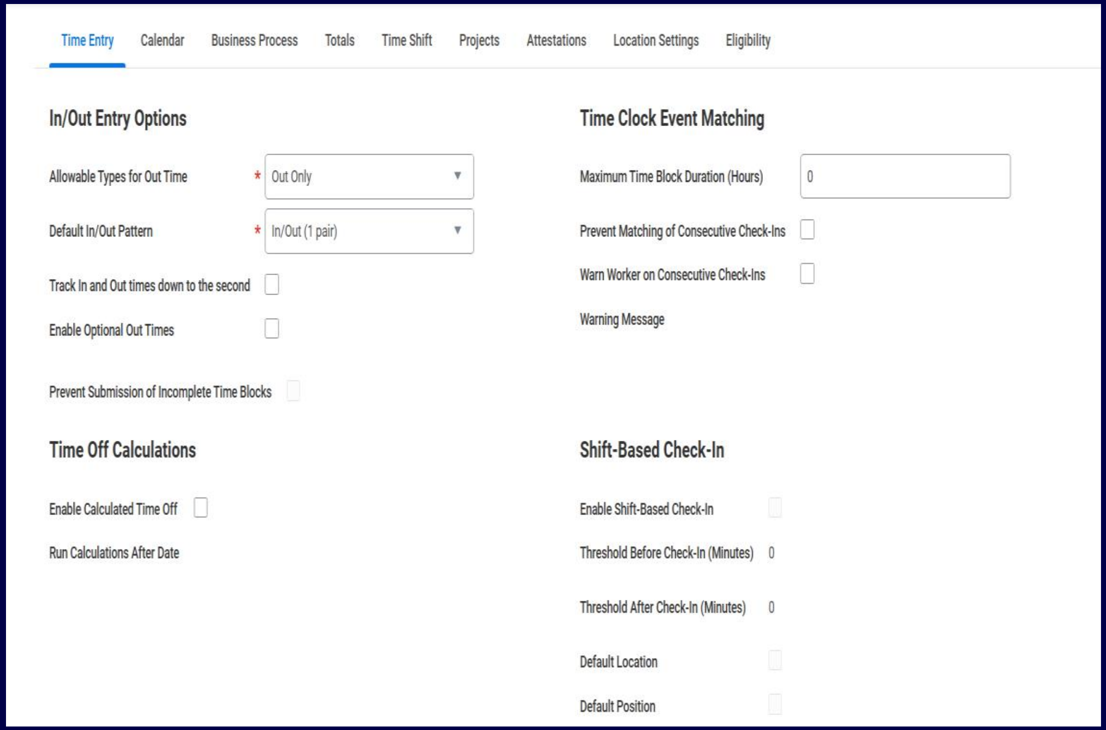
Setup required

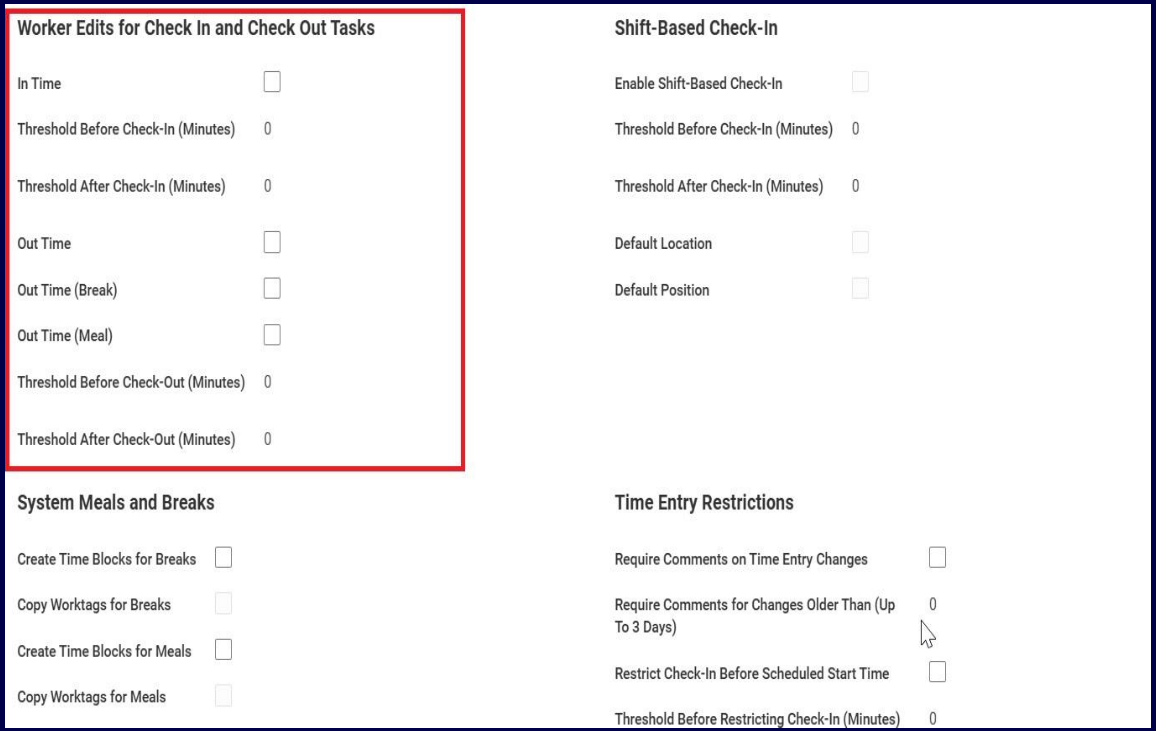
Flexible Check-In and Check-Out

Impact analysis

Before the release



After the release



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Setup required

Third-Party Scheduling

What's changing

With this release, when you import scheduled shifts from third-party systems, you can enable Workday to retrieve related attributes from the worker's imported shift. On both desktop and mobile, when workers check in using the Check In or Add Clock Event tasks, Workday can automatically populate the time entry code, position, and worktags using the data imported from the third-party scheduling system.

Additional considerations

Workday add a new Third-Party Scheduling section to the Noneffective-Dated tab of the time entry template that enables Workday to match schedule events from third-party scheduling systems with Workday check-ins so that Workday can populate default values when workers check in.

What do I need to do

On the Edit Time Entry Template task, in the Third-Party Scheduling section, enable the applicable options.

What happens if I do nothing

You will see no changes in Workday if you don't enable this feature.

https://doc.workday.com/release-notes/en-us/time/7801594.html

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Third-Party Scheduling, cont.

Additional considerations

This section contains 2 new check boxes:

- Import from Third-Party Schedules.
- Use Time Tracking Worktag Defaults.
- Workday deliver these new report fields on the Time Entry

Template business object (secured to the Set Up: Time Tracking domain) that enable you to verify your time entry template setup on the All Time Entry Templates report:

- Import from Third-Party Schedules.
- Use Time Tracking Worktag Defaults.

Workday deliver these new calculated fields on the Time Clock

https://doc.workday.com/release-notes/en-us/time/7801594.html

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Third-Party Scheduling, cont.

Additional considerations

- Event business object (secured to the Reports: Time
- Tracking, Self Service: Time Calendar, and Worker Data:
- Time Calendar domains) that you can use in your custom
- reports.
- Time Entry Code on Imported Schedule Event.
- Position on Imported Schedule Event.
- Variance Exists.
- Worktags on Imported Schedule Event.

Workday update these web services to support migrating third-party scheduling configurations via OX2.0 or iLoad:

- Get Time Entry Template.
- Put Time Entry Template.

https://doc.workday.com/release-notes/en-us/time/7801594.html

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Third-Party Scheduling, cont.

Additional considerations

When you select the Import from Third-Party Schedules check box, you can use the Import Ad Hoc Schedules web service to import schedule events as schedule blocks. When workers check in, Workday searches for the nearest schedule block start time within a 12-hour timeframe. If Workday finds a schedule block for the worker, it applies any values specified in the block as default values on the check-in event.

When Workday finds no scheduled shift or no value for an attribute in the schedule block, Workday uses the default time entry code from the worker's time entry template and applies the value specified there.

When you select the Import from Third-Party Schedules check box and clear the Use Time Tracking Worktag

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Third-Party Scheduling, cont.

Additional considerations

Defaults check box, if both the scheduled shift and the time entry code don’t specify values for a worktag, Workday doesn’t assign a value to that worktag.

When you also select the Use Time Tracking Worktag Defaults check box, if both the scheduled shift and the time entry code don’t specify values for a worktag, Workday evaluates the time entry template configuration and applies worktag values to the check-in event according to the worktag precedence rules. See Reference: Worktag Precedence in Time Entry in the Administrator Guide.

Note:

- Workday don’t currently support project-based third-party schedules.
- You can't enable Workday Scheduling if Third-Party Scheduling is enabled.

https://doc.workday.com/release-notes/en-us/time/7801594.html

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Setup required

Third-Party Scheduling

Impact analysis

Before the release	After the release
Before the release, Time entry template does not have option to configure third party scheduling.	After the release, enables to transfer time blocks within closed time entry periods without triggering retroactive payroll calculations or resulting in time calculations to run.

Impact description
This eliminates the expense of maintaining a separate integration system to load worker time and its associated data to Workday, and it makes checking in quicker and easier for workers.

https://doc.workday.com/release-notes/en-us/time/7801594.html

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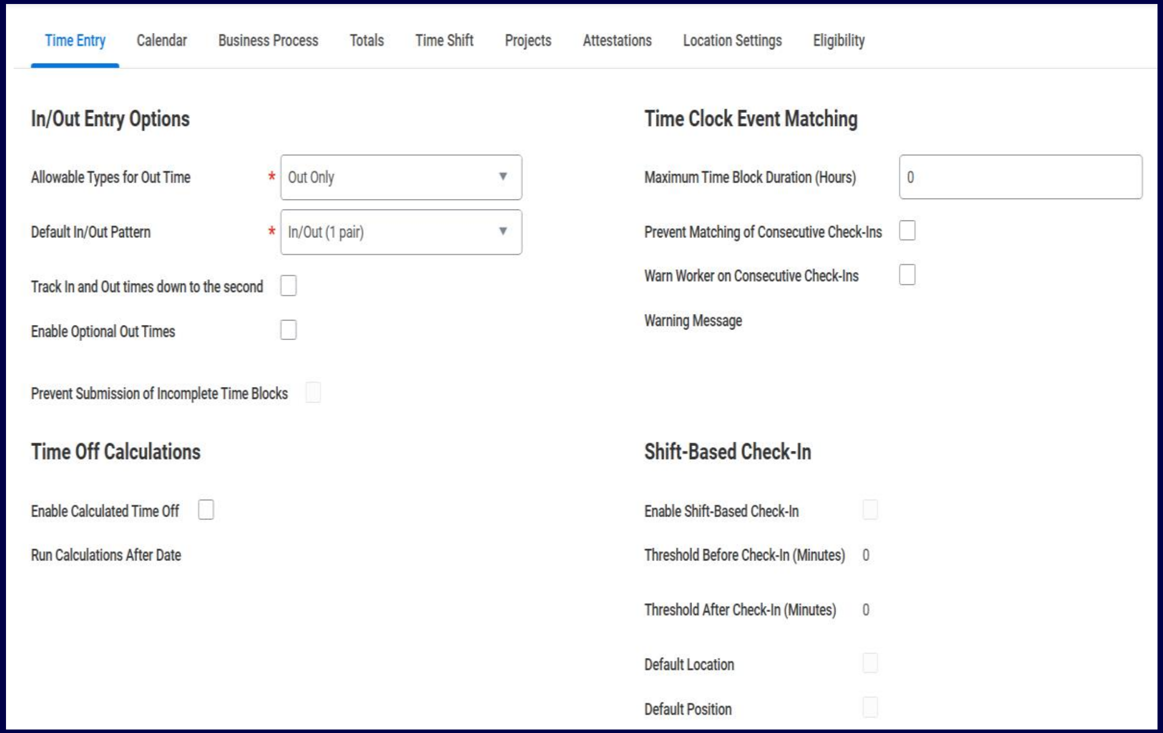
Setup required

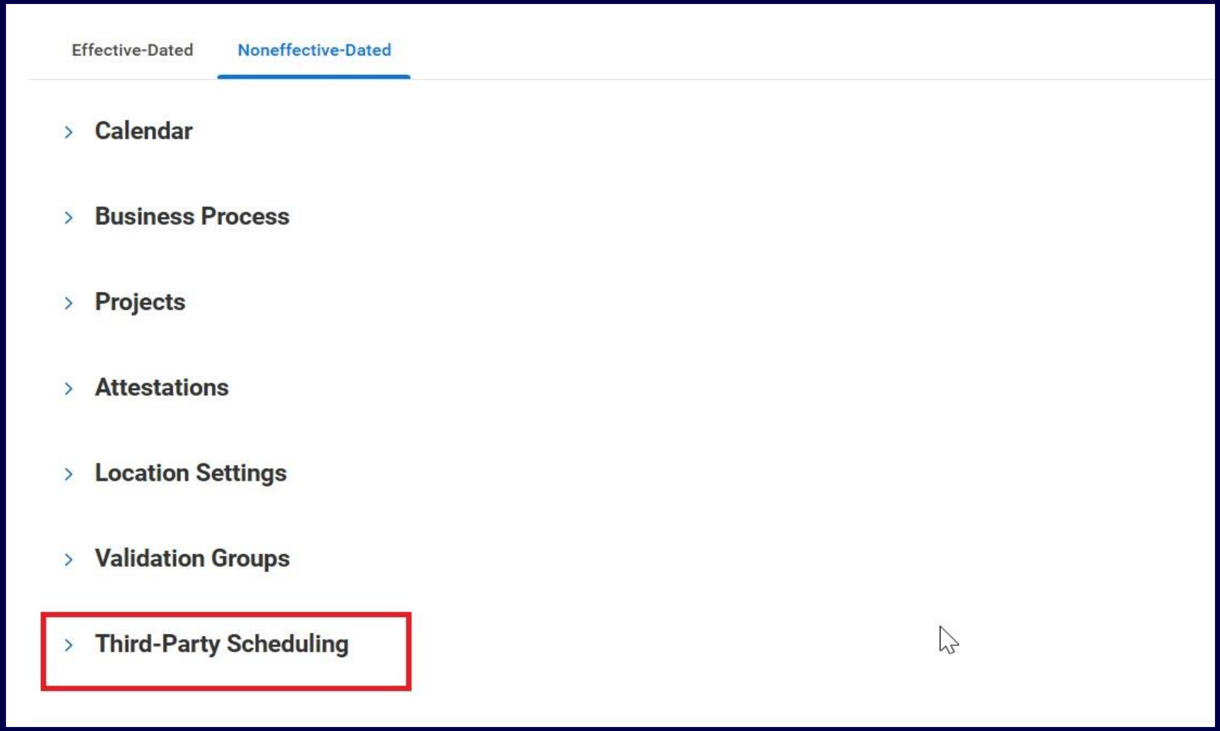
Third-Party Scheduling

Impact analysis

Before the release



After the release



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Additional release support services

Take advantage of one of our **Release Plus** packages

Option 1	Option 2	Option 3	Add On
Pre-release consulting support	Pre-/Post release audits, feature review, consulting support	Full Support	Regression Testing
Recommended for Clients that are self-sufficient in Workday and have the time to complete release management audits and resolve messages themselves, with guidance from Cognizant	Recommended for clients that need assistance resolving issues and may not have time or resources to conduct all audits	Recommended for clients that need assistance running audits and resolving issues and/or may not have time or resources to conduct audits and resolve messages	Recommended for clients that need assistance with testing entire modules and/or may not have the time or resources do this themselves

Contact your Service Delivery Lead (EM, SDM, PA) for more details on each package.

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Thank you

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