# Workday 2023 Release 2 Essentials.

## Get The Most Out Of Your Workday Release.

# Contents

# Understanding Workday Releases

## Understanding Workday Releases

Workday, it's a living ecosystem that constantly evolves to meet the changing needs of organisations. Regular updates are a core part of this evolution, ensuring that your organisation benefits from the latest innovations and improvements. Every Workday release holds the promise of new potential for your organisation. By staying informed and embracing these updates, you ensure that you're maximising the value of your Workday investment.

This guide includes best practices for managing updates, change management strategies to drive adoption, and our highlights from the latest feature releases to help you plan and make the most of the new functions offered to your organisation.

The Workday ecosystem is a supportive one and you'll find lots of help and resources on Workday Community.

Workday Guidebook

If you'd like more guidance our team is here to help. Get in touch.
**www.preos.co.uk**
**info@preos.co.uk**

Workday updates have previously followed a pattern of weekly service updates accompanied by more comprehensive biannual feature releases. However, in a notable shift, we see Workday increasingly introducing significant enhancements beyond the confines of its biannual release cycle.

What this means for Workday customers is that to stay ahead of the curve regarding new functionality, it is advisable to designate someone to conduct a weekly review of both the bug fixes implemented by Workday and the latest additions highlighted in the 'what's new' features.

Updates fall into two categories: mandatory and optional. Mandatory updates are the essentials – they keep your system secure and compatible. Then there are the optional ones which give you flexibility to decide if and when you want to adopt them. Some optional updates could become must-haves down the road as they become integral to functionality.

# Best Practices For Getting The Most From Feature Releases

When it comes to embracing the potential of Workday's feature releases, a strategic approach from a technical standpoint can make all the difference. Following best practices will empower your organisation to fully leverage the capabilities of each new feature.

## Consider The Impact.

Review and focus on mandatory features and features that will have a large impact on the experience of your end users.

## Forward Plan.

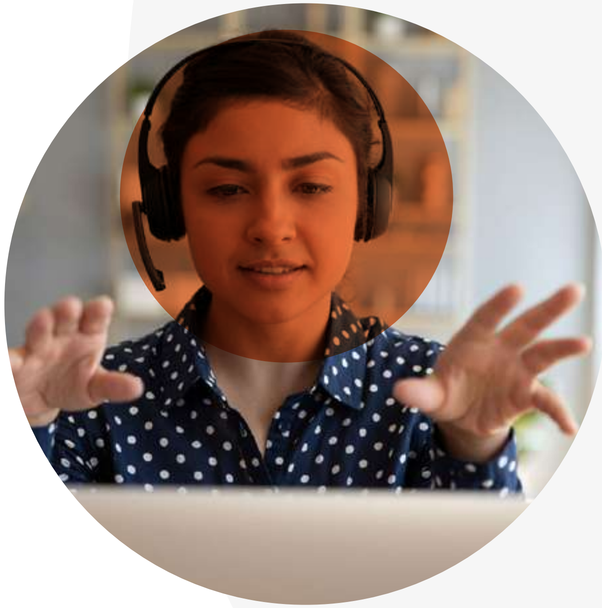
Start releasing planning early and plan for items that are currently optional but will be mandatory in the next release so that you are well prepared.

## Prioritise.

Focus on Workday functions which are being depreciated or retired. Review the features that solve current bugs or that are on your wishlist and plan lower priority items into your roadmap.

## Make A Schedule.

Make use of the tools in Workday like 'What's New' reports regularly, so that you are staying ahead of the curve and are well prepared.



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# Using Change Management To Your Advantage

Successful release management is about more than just technology – it's about guiding your people through the transformation and creating an environment where embracing new releases becomes second nature, driving your organisation's growth and success. Change Management strategies can help you do that:

## Choose Wisely.

Be selective about your communications including what you are communicating, who you are talking to and your communication method. You can configure announcements in Workday to be visible to select groups and tailor your messaging to the right audience. Select the best channel for communication - do your employees read emails? Or maybe it's better to make announcements on social channels where you can get some interaction and feedback.

## Get Personal.

When talking about the new release features, focus on the problems that they solve for your people, especially if you have had many support cases relating to the feature release.

## Create Training Materials.

Offer training to those who must know and understand changes and monitor the completion of training. Remember that there are different learning styles.

## Consider Global Vs. Regional Needs.

Communication language and style differ across the world. You may need to alter your communications based on local needs or with recommendations that the local teams can modify.

## Look At The Bigger Picture.

Take a strategic approach to increase the adoption of Workday and new features. Monitor support cases and address the top 5 issues regularly and often. Use your Workday roadmap plan to help you plan for and release communications and training as early as possible.

Many companies use Workday as the front for their Intranet with case management, knowledge articles, announcements, and the learning module.

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# Release Features 2023 R2

# Sell Time Off

Low Impact | Low Effort | Optional

## FEATURE RELEASE AT A GLANCE

- Employees can now conveniently request to sell their time off directly through the Workday Absence module. This streamlined process also includes an approval workflow via a new business process, ensuring proper governance and adherence to policies.

## WHY CONSIDER THIS RELEASE

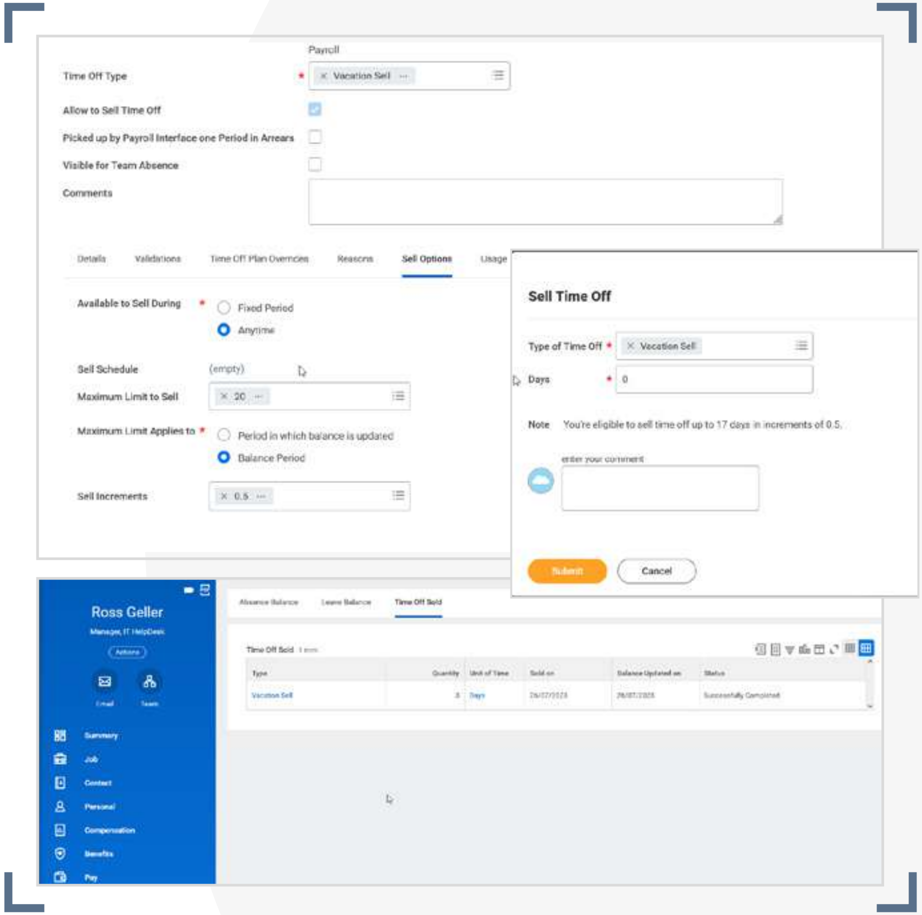
- This highly sought-after feature has been a frequent request from numerous organisations. By incorporating this functionality, you can effectively manage policies related to selling holiday time.

## YOUR NEXT STEPS

- Customers should configure a time off to be used for selling purposes and complete the sell options tab within the time off and attach it to the time off plan. Don't forget to add the time off to the relevant time off security segment.

## OTHER KEY INFORMATION

- Currently limited to self service only.

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Function: Absence

# New Absence Calendar Experience

High Impact

High Effort

Optional

Likely to be mandatory in a further release

## FEATURE RELEASE AT A GLANCE

- New and improved absence calendar design that reduces clicks when requesting time off or a leave of absence.

## WHY CONSIDER THIS RELEASE

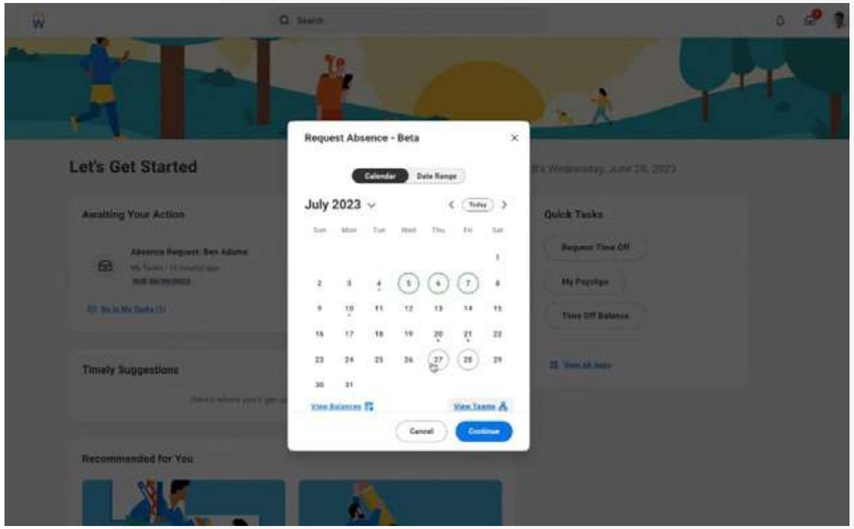
- This feature aims to streamline the absence process, ensuring a seamless experience for employees across both mobile and desktop.

## YOUR NEXT STEPS

- Opt into the new feature using the maintain feature opt ins task.

## OTHER KEY INFORMATION

- Workday currently state this will become mandatory in 2024 R2 and replace the existing Time Off Calendar and Absence Calendar design.

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Collaborate

# Skill Suggestions For Internal Candidates In Workday Recruiting

Low Impact | Moderate Effort | Optional

## FEATURE RELEASE AT A GLANCE

- Workday continues to leverage its powerful Skills Cloud to provide skill suggestions for internal candidates when they apply for positions. This feature enhances the application process by offering relevant skill recommendations that support internal talent.

## WHY CONSIDER THIS RELEASE

- This functionality enables you to uncover the skills available within your internal talent pool, facilitating better resourcing decisions. By matching internal candidates' skills with available opportunities, you can enhance employee retention, fostering loyalty and reducing the costs associated with external hiring.

## YOUR NEXT STEPS

- Opt-In to the HCM Machine Learning GA Features
- Ensure Skills Cloud is enabled
- Ensure you have checked the box around Populate Suggested Skills for Internal Candidates and Populate Suggested Skills for Workers.

## EFFECTS ON OTHER AREAS

- When an Internal Candidate applies they can indicate whether the skills identified during their application replace those skills that are on the Internal Candidates worker profile.

Learn More

# Automatically Decline Candidates On Close Of Job Requisition

Moderate Impact | Moderate Effort | Optional

## FEATURE RELEASE AT A GLANCE

- Automatically decline candidates when you close or mass close Job Requisitions or Evergreen Requisitions.

## WHY CONSIDER THIS RELEASE

- Efficiently decline candidates in a quick and simple way. You can also choose not to do this if a candidate is sat at a certain Job Application Status. E.g. the candidate as at a stage in the Job Application process where they've had meaningful contact with the Recruiter and so you might not want to use an automatic disposition in this scenario.

## YOUR NEXT STEPS

Decide if you want this configured for all candidates or just those at a certain status. There can only be a single disposition reason assigned to all candidates which needs to be agreed upon.

- Create a new disposition reason and add it to the stages of Job Application Business Process
- Update the Close Job Requisition, Mass Close Job Requisitions and Close Evergreen Business Process with a new batch/job step of Automatically Disposition Candidate with a Run As User for the step.
- Unhide the Decline Remaining Candidates option for each relevant business process.

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# Confirmed Opt-In For Email Communications

Low Impact

No Effort

Mandatory

## FEATURE RELEASE AT A GLANCE

- With this new feature Workday retains unsent emails while waiting for candidates to confirm their opt-in for email communications. This means that if a candidate has not yet confirmed their email preference, Workday will hold onto the unsent emails for a certain period of time. Once the candidate confirms their opt-in, Workday will automatically resend up to 20 of the previously unsent emails.

## WHY CONSIDER THIS RELEASE

- This will enhance the efficiency of your communications as you will no longer need to resend emails, allow you to respect candidate preferences and maintain compliance with data privacy regulations.

## OTHER KEY INFORMATION

- Workday doesn't resend Job Alert emails older than 2 weeks, Invite to Apply emails older than 4 weeks, and Send Message emails older than 3 months.
- If the original "trigger" email falls within the parameters of the total messages to be sent and look-back timeframe, it will be included in the re-sent messages.
- Only messages that were queued by a recipient's pending COI request after the 2023R2 release will be sent.

Learn More

# Email Attachments In Candidate Communications

Moderate Impact

Low Effort

Optional

## FEATURE RELEASE AT A GLANCE

- Workday now offers the ability to include attachments when sending candidate communications, such as ‘Invites to Apply’ or using ‘Send Message’.

## WHY CONSIDER THIS RELEASE

- This eliminates the need to rely on external email accounts to access or reference attachments. You can conveniently access and review all attachments within Workday, ensuring a seamless and centralised experience

## YOUR NEXT STEPS

- Ensure that the Send Message and Invite to Apply tasks are available (Domains: ‘Invite to Apply’ and ‘Candidate Communication’). Add these reports to the Candidate Profile: Activity Stream, Recruiting History and Candidate Communications.

Learn More

Function: Talent & Performance

# Manager Insights Hub

Moderate Impact | Significant Effort | Optional

## FEATURE RELEASE AT A GLANCE

- Workday has developed a new hub for Managers to view automated insights and timely suggestions about their team's career growth and development.

## WHY CONSIDER THIS RELEASE

- This designated space aims to empower managers with insights to review and support their team members' professional development..

## YOUR NEXT STEPS

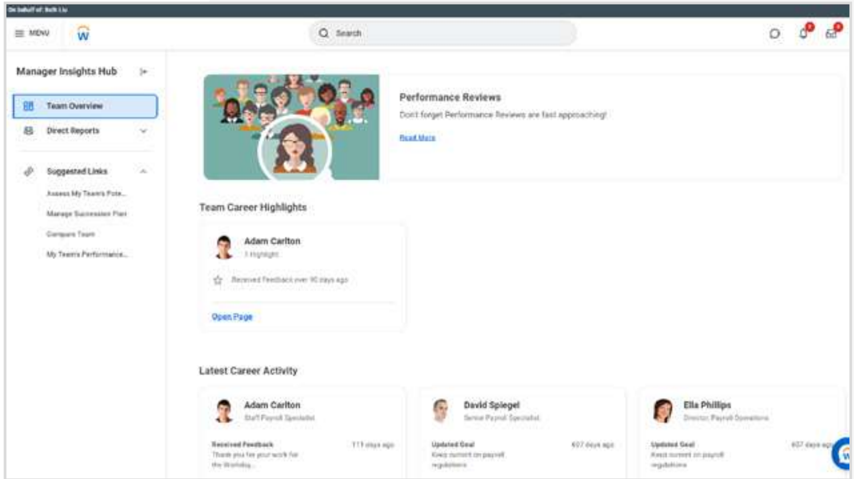
- Enable the new Manager Insights functional area.
- Enable and add security to the Manager Insights Hub domain
- Subscribe to the Innovation Services

Opt in to these data categories on the HCM Machine Learning GA Features tab:

- Talent Opportunity Marketplace Data
- Worker Profile Data
- Learning Data

## OTHER KEY INFORMATION

- You must have opted in to using Skills Cloud

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# Goals User Experience Redesign

Moderate Impact | Moderate Effort | Mandatory

## FEATURE RELEASE AT A GLANCE

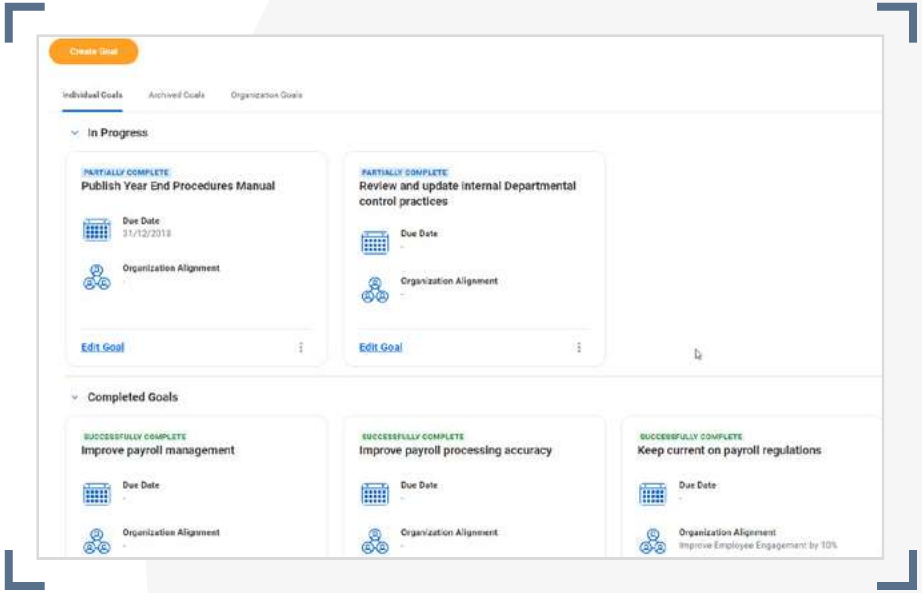
- Workday has redesigned the Goal User Interface. The enhanced experience reduces clicks and offers a simplified view so that users can easily navigate to perform any task.

## WHY CONSIDER THIS RELEASE

- The redesigned interface aims to simplify the user journey by reducing the number of clicks needed to access and perform tasks streamlining the overall user experience, saving time and effort. You can manage goals more effectively from the ease of creating and editing through to identifying when a goal is associated with a review.

## YOUR NEXT STEPS

- Configure the new View Goals task to be accessed in various mobile locations if you want to use the Goals mobile experience.
- Identify the impact of this replacement on your existing training materials.
- Review your configured condition rules and validations on your Manage Goals business process for continued relevancy and applicability.
- Review the setup of your standard dashboards, custom dashboards, and the configured tasks to ensure that you want the same configurations.
- Review the configurations on your Manage Goals business process security policy initiating actions to ensure that you want the same configurations due to the enhanced initiating actions available.

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# Gigs Express Interest Notes

Low Impact

Low Effort

Optional

## FEATURE RELEASE AT A GLANCE

- Workday has made an enhancement to the worker experience by allowing them to provide additional notes when expressing interest in a gig. This improvement enables workers to provide further context or information to support their submission, making it easier for them to showcase their qualifications and interest in a particular gig.

## WHY CONSIDER THIS RELEASE

- Overall this enhances the worker experience by giving them the opportunity to provide more context and support their submission. It assists the gig host to find the right resource for the gig.

## YOUR NEXT STEPS

- Select the 'Enable Gigs Express Interest Notes' option within Edit Tenant - Setup HCM.

## OTHER KEY INFORMATION

- The Workday native mobile app does not support Express Interest Notes.

Learn More

# Variable Time Type

Significant Impact | Significant Effort | Optional

## FEATURE RELEASE AT A GLANCE

- Workday has introduced a new time type called “variable” to complement the existing options of full-time and part-time. This variable time type allows you to customise the name to align with your organisations specific terminology. For example, it can be named “zero hours” or any other relevant designation based on your organisations requirements.

## WHY CONSIDER THIS RELEASE

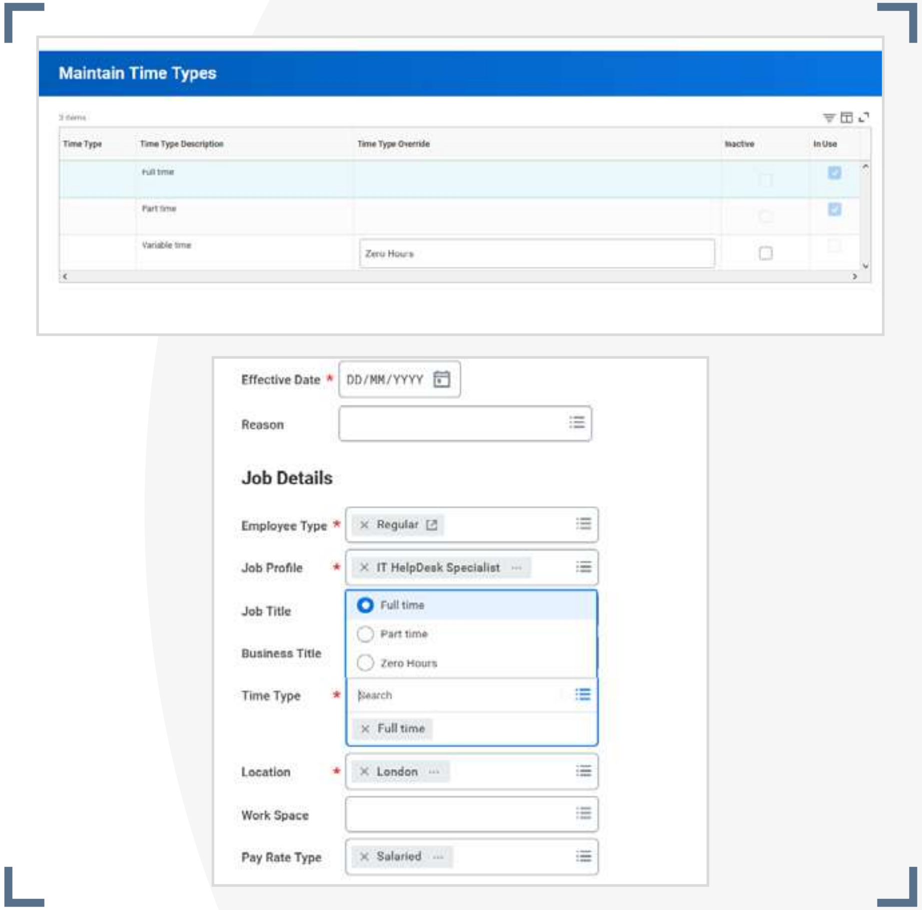
- It allows you to accurately track additional time types and align time tracking with your organisations specific terminology.

## YOUR NEXT STEPS

- Navigate to the maintain time types in workday and uncheck the inactive box next to the variable time type.

## EFFECTS ON OTHER AREAS

- May impact time tracking, absence and compensation depending on the existing Workday set up.

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# Change Job Defaulting

Moderate Impact | Moderate Effort | Optional

## FEATURE RELEASE AT A GLANCE

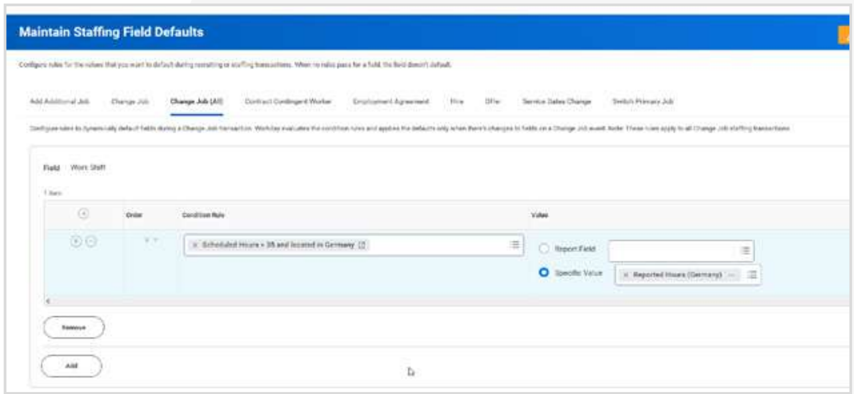
- Workday now offers the ability to configure default values for the Change Job process. This enhancement allows you to automatically populate fields such as Business Title, Job Title, Time Type, and Work Shift when running the Change Job business process.

## WHY CONSIDER THIS RELEASE

- Reduce errors when completing change jobs, especially when initiated by Mangers.

## YOUR NEXT STEPS

- Define a set of rules in the maintain staffing defaults screen to allow fields to be defaulted in, for example all employees in Germany who are full time should have the default work shift of 5 days.

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# HR Partner Hub

No Impact | Low Effort | Optional

## FEATURE RELEASE AT A GLANCE

- The HR Partner Hub is a centralised platform that offers HR partners a single point of access to workforce movement information, as well as reports and dashboards that are most pertinent to their work.

## WHY CONSIDER THIS RELEASE

- HR partners can easily access up-to-date data, reports and other information necessary to stay informed.

## YOUR NEXT STEPS

- You may need to create the domain security policy using the task create a security policy for the domain. The domain of Worker Data: HR Partner Hub should then be populated with the relevant security groups.
- Hub can be configured further if required.

Learn More

# Advance Unassigned Business Process Steps

Low Impact | Low Effort | Optional

## FEATURE RELEASE AT A GLANCE

- Workday now offers the capability to advance unassigned steps in a business process at the tenant level. This enhancement allows you to easily move unassigned steps within a business process forward to the next step or through subsequent unassigned steps until completion.

## WHY CONSIDER THIS RELEASE

- This functionality makes it easier to advance business processes and tidy up processes with open steps in the tenant.

## OTHER KEY INFORMATION

Can easily advance an unassigned step within a business process through the:

- Advance Business Process Mass Operation Management type.
- Advance Manually related action.
- Mass Advance Business Process task.

By enabling the configuration, you can now advance:

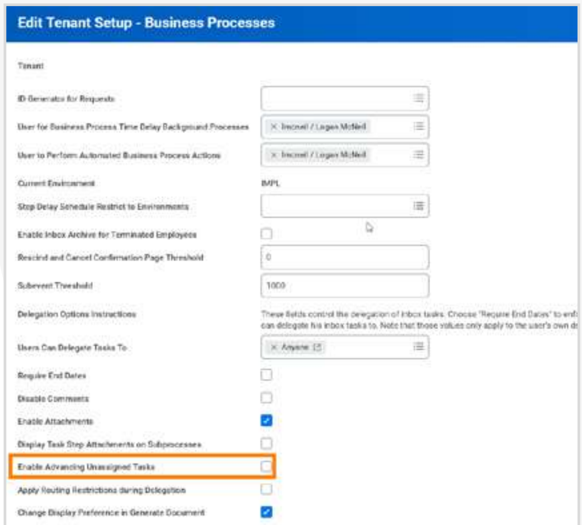
- From an unassigned step that's pending reassignment.
- Through an unassigned step and multiple subsequent unassigned steps.
- A business process to completion through an unassigned step that generates a reassignment during processing of the advancement.

## YOUR NEXT STEPS

- Check the checkbox in Edit Tenant Setup - Business Processes

## EFFECTS ON OTHER AREAS

- Impacts all functional areas



# Probation Period Improvements

Moderate Impact | Moderate Effort | Optional

## FEATURE RELEASE AT A GLANCE

- You have the ability to easily end probation periods and configure probation period reviews for employees with future-dated terminations. This brings improvements to the probation period management process.

## WHY CONSIDER THIS RELEASE

- Reduce issues with probation period reviews for terminated workers.

## YOUR NEXT STEPS

- Enable Probation Period: Review on the task to Maintain Localization Settings task.
- Configure autocomplete on your Manage Probation Period business process.
- Add end probation period as a sub step of termination.

Learn More

# Compensation Review Statement Visibility By Employee

Low Impact | Moderate Effort | Optional

## FEATURE RELEASE AT A GLANCE

- The previous update introduced extended functionality that allows organisations to set visibility dates on compensation review statements. This feature provides increased control over when employees can view their statements.

## WHY CONSIDER THIS RELEASE

- Increased flexibility and accuracy in making compensation review statements visible to employees.

## YOUR NEXT STEPS

- Security Domain Worker Data: Compensation Review Statement Visibility needs to be configured.

## OTHER KEY INFORMATION

- The Statement Visible check box is now only selectable after you've generated the employee's Compensation Review Statement PDF. You can now set the visibility date from the task Set Compensation Review Statement Visibility.

# Skills And Feedback In Compensation Reviews

Low Impact

Low Effort

Optional

## FEATURE RELEASE AT A GLANCE

- With this release, your organisation can now consider skills and feedback data when determining bonuses and stock allocation during compensation review processes.

## WHY CONSIDER THIS RELEASE

- Skills and feedback can be viewed during the compensation review process for planners to make a more informed decision.

## YOUR NEXT STEPS

- To include the report fields in the compensation review process, add them to the compensation review grid configuration.

Learn More

# Custom Calculation Lists For Merit, Promotion, And Stock

Significant Impact | Significant Effort | Optional

## FEATURE RELEASE AT A GLANCE

- The latest update expands the functionality of custom calculation lists, previously available for bonuses, to include merit, promotion, and stock calculations.
- Users can now select and utilise calculation lists created in the 'Maintain Compensation Review Calculation Lists' task when configuring calculation tables.

## WHY CONSIDER THIS RELEASE

- The inclusion of custom calculation lists for merit, promotion, and stock processes brings efficiency, consistency, and accuracy to compensation management. By leveraging these lists,  organisations can create a fair and transparent compensation review process that aligns with specific goals and objectives. It allows custom list options to be selected in the compensation review grid by planners to determine awards based on a configured calculation.

## YOUR NEXT STEPS

- The report fields need to be added to the compensation review grid configuration as well as creating custom lists and custom calculations.

# Prevent Check-In Before Scheduled Time

Moderate Impact | Significant Effort | Optional

## FEATURE RELEASE AT A GLANCE

- The latest update introduces a new feature that allows your organisations to prevent workers from checking in before their scheduled shift start time. This check-in prevention functionality applies to both web and mobile time clocks.

## WHY CONSIDER THIS RELEASE

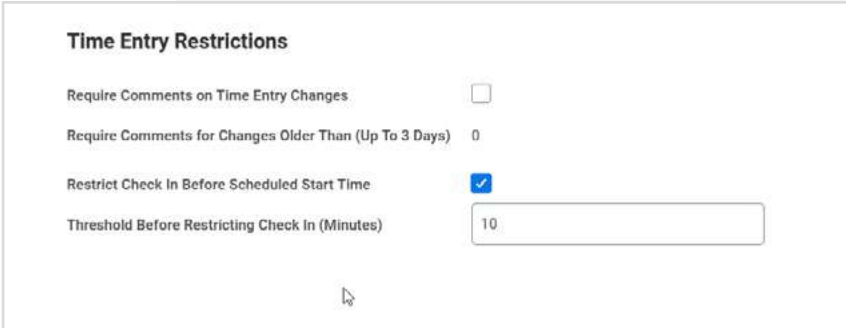
- This feature helps to improve time tracking accuracy and reduce costs due to incorrect check-ins.

## YOUR NEXT STEPS

- Enable standard mobile check-in must be enabled if you wish to use this on mobile. Edit or create a time entry template and complete the Restrict check-in before the scheduled start time box and save.

## OTHER KEY INFORMATION

- This feature also prevents workers from checking in after the shift ends.

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# Time Accumulator Opt In And Opt Out

Significant Impact

High Effort

Optional

## FEATURE RELEASE AT A GLANCE

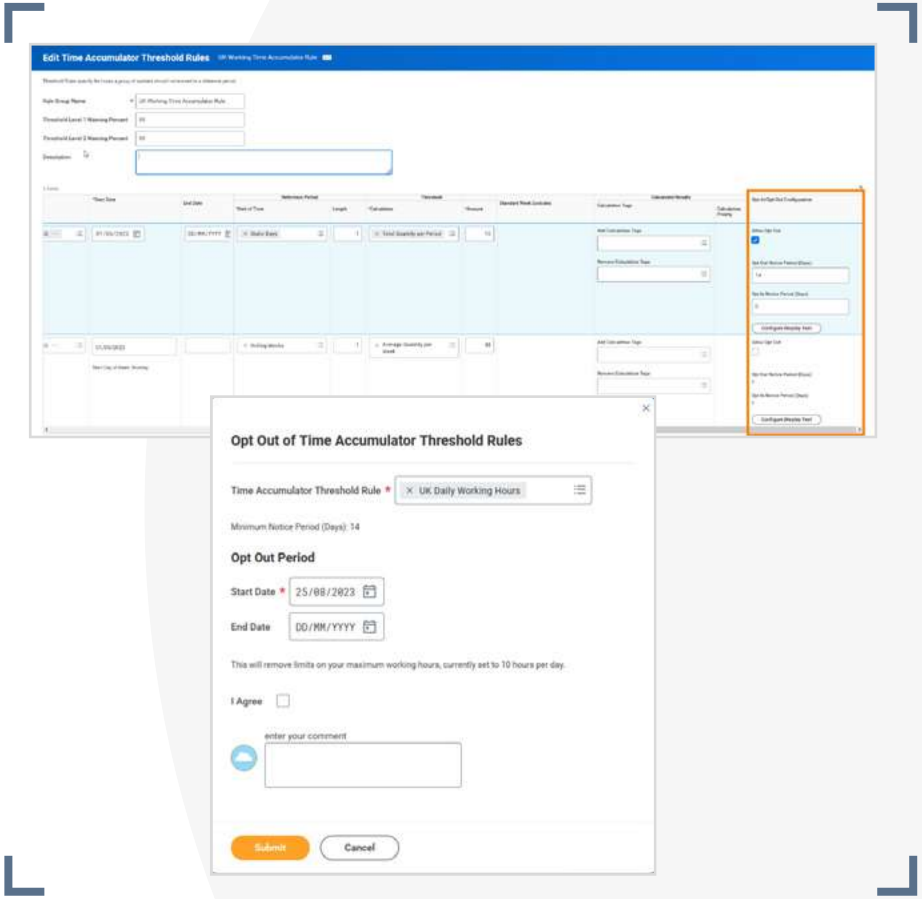
- The ability to configure opt-out and opt-in settings on time accumulator threshold rules has been added. Additionally, the feature to allow workers to opt out of time accumulator threshold rules for working time or overtime restrictions (such as working time directives) has been introduced. They can also opt back in when necessary.

## WHY CONSIDER THIS RELEASE

- Allow workers to choose if they wish to opt out of legal rules such as working time directive, helping you comply with legal rule sets.

## YOUR NEXT STEPS

- Create the default definitions for the new business processes 'Time Accumulator Threshold Rule Opt In' and 'Time Accumulator Threshold Rule Opt Out' as well as configuring relevant security.
- You will then need to edit or create time accumulator threshold rules and complete the checkbox to allow workers to choose to opt in our out of those rules.

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Function: Core Compensation

# Improving Compensation Experience In Job Changes For Managers

Low Impact | Significant Effort | Optional

## FEATURE RELEASE AT A GLANCE

- This release introduces new capabilities for optional fields, display position in range and compa-ratio during the Propose Compensation step, and enable plan assignment defaulting based on changes to compensation guidelines An easier and more intuitive process to propose compensation during the Change Job business process.

## WHY CONSIDER THIS RELEASE

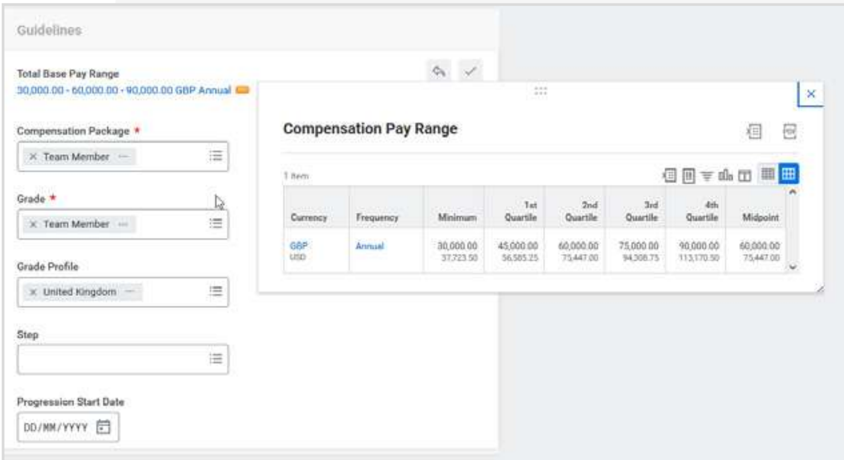
- It allows your Managers better visibility of compensation ranges during the change job process.

## YOUR NEXT STEPS

- Select Enable Defaulting Based on Changes to Guidelines option on the Edit Tenant Setup – HCM task to enable plan assignment defaulting based on guideline changes.
- Select the respective settings Display All Segments for Total Base Pay or Primary Compensation Basis Pay Ranges.
- Update your existing settings in the Edit Compensation Package Analytics task.
- Make specific fields read-only or hide Total Base Pay or Primary Compensation Basis ranges within the Guidelines tasklet within compensation change processes.

## EFFECTS ON OTHER AREAS

- Compensation / HCM crossover

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# Configurable Resolution Status For Request Framework

Moderate Impact | Moderate Effort | Optional

## FEATURE RELEASE AT A GLANCE

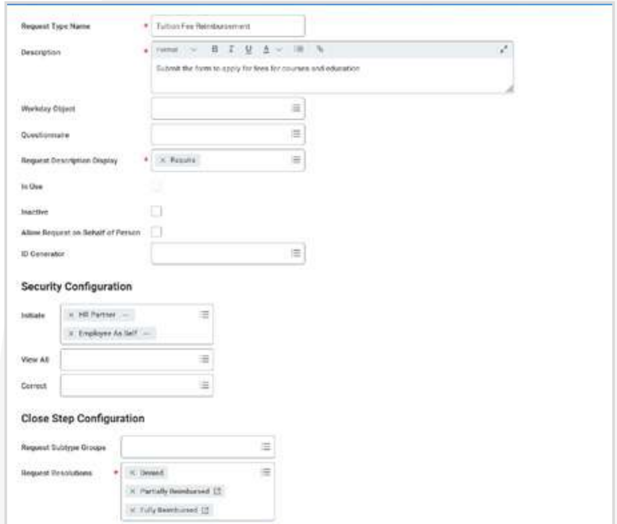
- Workday continues to enhance the Request Framework by offering the ability to create custom request resolutions, allowing for a more configurable resolution status.

## WHY CONSIDER THIS RELEASE

- This allows you to create resolutions that are applicable to that request type and your business.

## YOUR NEXT STEPS

- Edit or create new request types and under request resolutions you can create new custom resolution types.



# Document Purging In Compensation

Low Impact

Low Effort

Optional

## FEATURE RELEASE AT A GLANCE

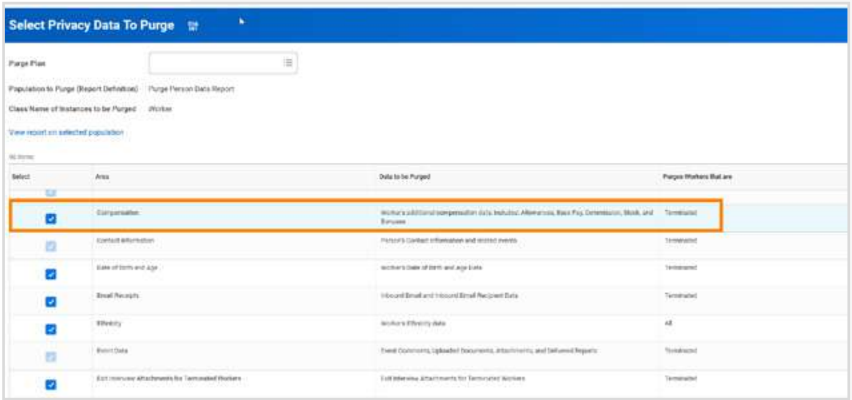
- This feature allows you to purge attachments specifically for terminated workers in compensation processes.

## WHY CONSIDER THIS RELEASE

- Document purging enhances data privacy and compliance by eliminating sensitive information associated with terminated employees. It helps your organisation to maintain data integrity and ensure regulatory compliance.

## YOUR NEXT STEPS

- Existing purge plans using compensation will automatically include the documents.



# The Value Of Strategic Workday Release – A Case Study

**After the Workday 2022R1 feature release weekend, a prominent UK bank encountered an unexpected change to its Workday home screen in production, affecting all users.**

The sudden change to their Workday home screen, while surprising, prompted a period of adjustment for users and temporarily disrupted their daily operations.

This incident highlighted the significance of planning and communicating for feature releases, emphasizing the potential risks of an undefined update process and its possible effects on employee well-being and efficiency. It also stressed the importance of a coordinated approach to release management.

## The Learning Experience

The bank's experience serves as a compelling example of the value of thorough release planning. It reinforces the significance of not only understanding the technical aspects of feature releases but also recognizing their broader impact on user experience and organisational operations.

## What They Did Next

The bank recognized the need to enhance the process for handling regular Workday feature releases, acknowledging that their existing approach hindered them from fully capitalising on new features. Post-incident, the bank sought assistance from Preos to establish a robust release management framework. Preos initiated a thorough investigation into the bank's existing release management procedures. Our collaboration centred on aligning these existing procedures with the Workday release cycles. This alignment concentrated on diverse aspects, ranging from feature and impact analysis to deployment, testing, change management, communication, and training.

## The Outcome

The outcome was twofold: internal confidence in their ability to navigate release processes grew, and concerns about unforeseen issues or audit complications lessened considerably.

Furthermore, this newfound approach enabled the bank to reap the benefits of Workday's weekly service updates. By establishing a structured framework for analyzing features and patches, they were able to assess impacts and execute controlled implementations in production.

Overall, the experience highlighted the merits of a thorough release management strategy, leading to smoother transitions, bolstered internal confidence, and a more collaborative relationship with the evolving features of Workday.

Read The Full Story ▶

# Feature Release FAQs

## Can I Customise New Features To Fit My Organisation's Needs?

New features are designed to provide value out of the box, however, some features can be shaped to match your specific needs. You can tweak settings, workflows, and more.  Workday provides guides to help you fine-tune these features. But remember, while customisation is possible, there might be limitations to help maintain system stability and ensure compatibility with future updates. As such, it's recommended to follow best practices and consult an expert when considering customisation of new features.

## Can I Roll Back Or Revert To A Previous Version If A New Feature Causes Issues?

Workday typically offers mechanisms that allow you to revert to a previous iteration if a newly introduced feature encounters compatibility or functionality issues. This recourse ensures that your organisation can restore the familiar configuration until any concerns are addressed. However, it's important to note that not all features may be reversible, and therefore careful consideration and planning are needed during the release window.

## Will Our Users Need Extra Training For New Features?

It depends on the complexity of the new features and how they integrate with your existing processes. Workday aims for intuitive design, but more intricate functionalities might benefit from some user training. Workday often provides resources like documentation, videos, and tutorials to help users adapt smoothly.

## Can I Text New Workday Features In Sandbox Before Deploying Them?

Using sandbox to test new features is a recommended practice. It allows you to evaluate how new functionalities will work in your specific context before rolling them out to your production environment. Regular testing in the sandbox is advisable before implementing any significant changes or updates in the production environment. It helps identify issues early and ensures a smoother transition.

**Have a question? Email our team at info@preos.co.uk and our experts will come back to you.**

**Embracing releases offers you improved features, enhanced performance, and heightened security. The Workday ecosystem is a supportive one and you'll find lots of help and resources on Workday Community.**

Workday Community ▶

**If you have any questions about Workday 2023 R2 or Release Management, our team of experienced Workday consultants is here to help. Get in touch.**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