Workday 2024 Release 1 Essentials.

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Contents

Understanding Workday Releases

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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.

Learn More ▶

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.

Learn More ▶

Release Features 2024 R1

Function: Advanced Compensation

Workday Docs For Layouts

Moderate impact | Moderate effort | Optional

FEATURE RELEASE AT A GLANCE

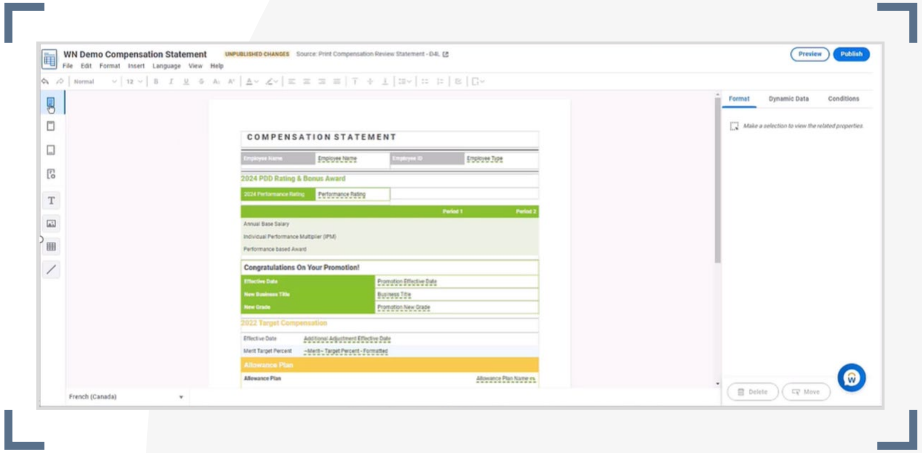
The Workday Docs product has been expanded to support advanced reports. The new feature, 'Docs for Layouts', is designed to be used in the Compensation Review process.

WHY CONSIDER THIS RELEASE

This enhancement allows the creation of compensation statements without the need for BIRT Designer or Workday Studio. It enables the inclusion of various content types (text, tables, images, headers, and footers), the addition of new pages, the adjustment of page settings, and previewing the layout during its construction. It also supports the insertion of data fields and the application of condition rules.

YOUR NEXT STEPS

- Set up security groups and policies for the 'Docs for Layouts' security domain.
- Create and publish your document layout.
- Select the document layout when configuring a business form layout to print your documents.



Learn More

Grid Configuration Profiles For Compensation Review

Moderate impact | Moderate effort | Optional

FEATURE RELEASE AT A GLANCE

The update brings increased flexibility to grid configurations in compensation reviews. This enhancement allows multiple grid configurations for the same compensation review process.

WHY CONSIDER THIS RELEASE

Each grid can now be tailored to different users in the compensation review process based on attributes such as their locale, organisation, assigned roles, and more. It is also advised to configure a default grid configuration for broader use.

YOUR NEXT STEPS

- Plan to configure a comprehensive compensation review grid configuration to use as a default, and one or more targeted grid configurations to use as profiles.
- Use the 'Create Conditional Calculation' task and select Result > Compensation > grid configuration to create grid configuration profiles.
- Use the 'Initiate Compensation Review Process' task and select from the Grid Configuration Profiles prompt. You can also select grid configuration profiles on the 'Create' and 'Edit Compensation Review Template' tasks.

OTHER KEY INFORMATION

- The default response grid must contain all the award types in your compensation review process. If a planner or manager enters the compensation review but doesn't meet any of your grid profiles, they'll see the default response grid.
- If you unselect 'Allow Pool Overages' when managing compensation review pools and an award type isn't visible on the grid, planners may not be able to see that an award is overspent, edit the awards, or submit.
- Consider and thoroughly test your custom validations and configurations with your grid profiles. Ensure planners have access to applicable fields and award types so that they can clear the validations.

Learn More

Dynamic Talent Pool Membership Caching

Low impact | No effort | Mandatory

FEATURE RELEASE AT A GLANCE

The creation and management of dynamic talent pools are further improved with more frequent membership updates from a cache of saved search results. This ensures you have the most updated list of members for your talent pool.

WHY CONSIDER THIS RELEASE

To maintain accurate membership and enhance the performance of membership counts, a daily background job now runs on or after 2 am PST. This job updates the membership of active dynamic talent pools in your tenant by adding new members fitting the original saved search criteria and removing existing members that no longer meet these criteria.

OTHER KEY INFORMATION

- You also have the option to manually update your dynamic talent pool membership more frequently than the scheduled background job.
- You can update a dynamic talent pool by clicking the 'Update Membership' action on the Talent Pools report or the new 'Update Membership' button on the dynamic talent pool page. These updates are based on the stored search and not on an existing saved search.

Learn More

REST API Support For Requested Feedback

Low impact

Moderate effort

Optional

FEATURE RELEASE AT A GLANCE

This update adds REST API support for the ‘Get Feedback on Self’, ‘Get Feedback on Worker’, and ‘Give Requested Feedback’ business processes. This allows you to create your own customised feedback experience.

WHY CONSIDER THIS RELEASE

Web services for ‘Get Feedback on Self’, ‘Get Feedback on Worker’, and ‘Give Requested Feedback’ business processes enable you to use Workday HCM as the source of truth.

YOUR NEXT STEPS

- To use the Feedback REST APIs, perform the following steps:
- Add the ‘Feedback Responder’ security group in the business process security policy for each business policy definition.
- Also, add the ‘Feedback Responder’ security group to the ‘Self-Service: Role-Requested Feedback’ and ‘Self-Service: Self-Requested Feedback’ security domains.
- Add the initiating action(s) delivered to the business process security policy(ies), to allow permission to access the REST API.

Learn More

Goals User Experience Redesign Iteration

Low impact

No effort

Mandatory

FEATURE RELEASE AT A GLANCE

This update enhances the 'Goals as cards' user experience for better navigability, usability, and click-through. These changes will apply if you have opted into the 'Goals User Experience Redesign Changes' feature on the 'Maintain Feature Opt-Ins' task.

WHY CONSIDER THIS RELEASE

These changes aim to provide you with a better user experience.

YOUR NEXT STEPS

This improvement is automatically available if you are using the 'Goals User Experience Redesign Changes' feature. No additional actions are required.

Learn More

Talent - Miscellaneous Enhancements

Low impact

No effort

Mandatory

FEATURE RELEASE AT A GLANCE

This update brings several enhancements to improve user experience. These include:

- Replacing the drill-down in the 'Employee Reviews Started' field with a count of the number of reviews that use the template when viewing an employee review template.
- Updating the 'Get Additional Manager Evaluation for Performance Review' task to allow the selection of Matrix Managers from the Reviewers prompt, provided you've created one or more matrix managers for the worker.
- Removing the validation warning when workers select a locked feedback template in the 'Get Feedback on Self' and 'Get Feedback on Worker' tasks when all selectable feedback templates are locked.
- Updating the 'Manage Goals' web service to return goal instances for goals being created or updated.

WHY CONSIDER THIS RELEASE

These enhancements will improve the user experience by showing the number of reviews that use the template, enabling the selection of matrix managers for additional manager evaluation, and removing the validation warning when workers select a locked feedback template.

Learn More

Hide Default Ratings In Employee Reviews

Low impact

Low effort

Optional

FEATURE RELEASE AT A GLANCE

In this release, Workday introduces a feature that enables you to hide default ratings in the overall section of employee reviews.

WHY CONSIDER THIS RELEASE

If there's a need to hide the default rating in employee reviews, this release makes it possible. It enhances the customisation and control over the visibility of review results, thereby allowing for more flexibility in managing performance feedback.

YOUR NEXT STEPS

This feature is available as an optional checkbox in the Employee Review Template Overall section. To enable this, Workday has added the 'Show Default Rating' check box to the Overall section page of the 'Configure Employee Review Template' task. The new checkbox only displays when you select the 'Calculated Rating with Overrides' option in the Rating Configuration field.

Learn More

Time Accumulator Manager Experience

Low impact

Low effort

Optional

FEATURE RELEASE AT A GLANCE

Workday is enhancing the Time Accumulator framework. This improvement allows managers to manage their employees' time accumulator threshold rules more effectively. The update introduces new reporting capabilities and the ability for employees and managers to opt in or out of threshold rules.

WHY CONSIDER THIS RELEASE

This enhancement increases Employee and Manager self-service regarding Time Accumulator rules and thresholds. It gives more control to both managers and employees, making time management more flexible and efficient.

YOUR NEXT STEPS

To implement this enhancement, you need to update existing time accumulator threshold rules to allow employees to opt out of them. Then, set up the 'Time Accumulator Threshold Rule Opt In' and 'Time Accumulator Threshold Rule Opt Out' business processes.

Learn More

Enter Time By Period

Low impact

Low effort

Optional

FEATURE RELEASE AT A GLANCE

The new feature allows workers to use an intuitive calendar view that aligns with their time-tracking period schedule. Workers can now enter time in weekly, monthly, biweekly, or semi-monthly periods.

WHY CONSIDER THIS RELEASE

This enhancement allows workers to enter time for an entire pay period at once, simplifying the time-entry experience and reducing errors. It enhances accuracy and efficiency in time tracking.

YOUR NEXT STEPS

To implement this feature, create the security policy for the domain 'Self Service: Period Time Calendar', and the applicable security groups.

OTHER KEY INFORMATION

Currently, this calendar is only available for employee self-service. However, Workday plans to deliver a similar calendar for managers and administrators in a future release.

Learn More

Edit And Approve Time Improvements

Low impact

No effort

Mandatory

FEATURE RELEASE AT A GLANCE

Workday now displays shifts that cross the day breaker matching the configuration of workers' time entry templates

WHY CONSIDER THIS RELEASE

This update streamlines the manager experience by making it easier to review time for workers with overnight or unconventional shifts. It aligns the display of shifts with workers' time entry template configurations, enhancing ease of use and efficiency.

YOUR NEXT STEPS

Available automatically. Some updates to training materials may be required.

Learn More

Effective Date Support In Time Tracking

No impact
No effort
Mandatory

FEATURE RELEASE AT A GLANCE

With this new release, Workday now allows you to apply effective dates to time calculation groups and time calculations.

WHY CONSIDER THIS RELEASE

This feature supports changes in legislation or company policy, ensuring accurate pay for workers. It also enhances reporting capabilities, allowing you to view current, past, and future snapshots of time calculations and time calculation groups. This makes it easier to track changes over time.

YOUR NEXT STEPS

No immediate action is required as Workday automatically creates and applies an initial snapshot date as part of the release. In future, when editing time calculations or time calculation groups, administrators will be prompted to update the existing snapshot or enter a new effective date.

Learn More

Notification Trigger On Disposition

Moderate impact

Low effort

Optional

FEATURE RELEASE AT A GLANCE

Workday has introduced a feature that allows the automatic sending of notifications based on the selected disposition reason. This enhancement is expected to reduce administrative tasks significantly

WHY CONSIDER THIS RELEASE

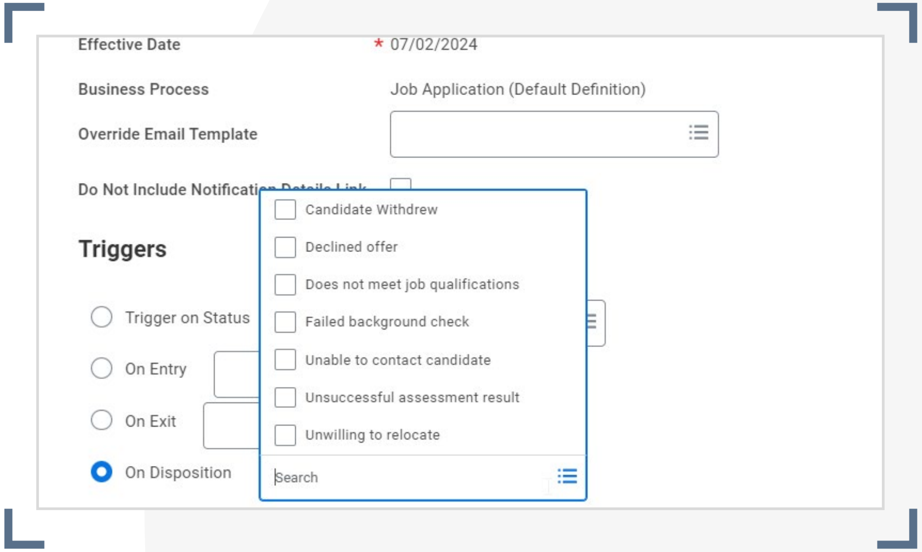
The benefits of this release item are that it reduces admin tasks of sending separate messages. It allows for different notifications to be sent based on the disposition reason selected.

YOUR NEXT STEPS

When creating a notification in the Job Application Business Process, you now have the option to select a disposition reason as a trigger for the notification. It's recommended to review and possibly amend the current notifications sent out when a candidate is dispositioned.

OTHER KEY INFORMATION

When you configure a notification using the 'On Disposition' prompt, the notification will apply to all stages of the Job Application business process where the disposition reason is configured. This ensures consistent communication throughout the entire process.



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Recruiting Disposition Categories

Low impact

Low effort

Optional

FEATURE RELEASE AT A GLANCE

Workday now allows customers to categorise their recruiting dispositions. This feature contributes to improved organisation and flexibility, enhancing the management of recruiting dispositions.

WHY CONSIDER THIS RELEASE

The implementation of this update enables customers to maintain their recruiting dispositions with more flexibility and accuracy. It can reduce manual effort and provide recruiters with a clearer understanding of why a candidate's application was rejected or why the candidate withdrew.

YOUR NEXT STEPS

Customers can create and assign categories to their recruiting dispositions to utilise this new feature. If you have any custom reports related to dispositioning, you might want to consider updating them to include the disposition category.

OTHER KEY INFORMATION

Categories only appear when taking disposition action through Mass Actions or using the 'Move Candidate' functionality. If you plan to add categories, it is suggested to include all disposition reasons in a category. Otherwise, the list of dispositions would show a mix of categories and reasons, which could lead to confusion.

Learn More

Function: Talent Acquisition

Skills Cloud For Candidate Pools And Prospect Introduce Yourself

Moderate impact | Low effort | Optional

FEATURE RELEASE AT A GLANCE

Workday has enhanced the Candidate Pools feature by allowing customers to select Skill Cloud skills for dynamic candidate pool membership. Furthermore, Workday has updated the Prospect Introduce Yourself form on external career sites, enabling an automatic population of a prospect's suggested skills when they submit their CV.

WHY CONSIDER THIS RELEASE

This update enhances the efficiency of candidate selection in two ways. The feature within Candidate Pools makes it easier to identify prospects and candidates that match hiring needs. The Prospect Introduce Yourself feature provides recruiters with more information about a prospect, aiding them in determining potential recruitment areas.

YOUR NEXT STEPS

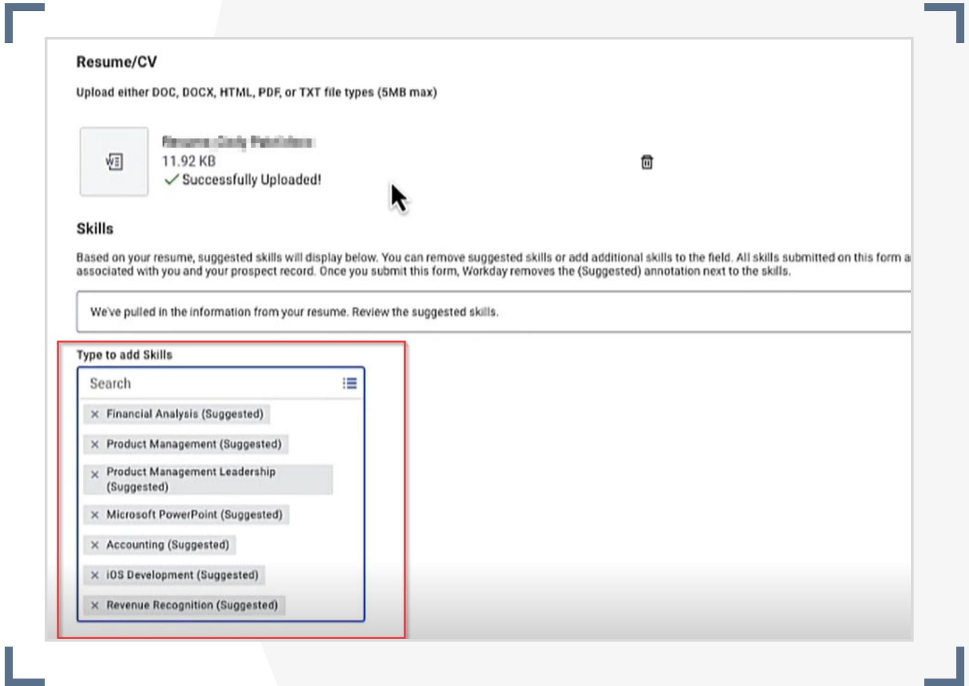
To utilise this feature, customers must have enabled Skills Cloud, enabled Prospect Introduce Yourself, and selected the option to 'Populate Suggested Skills for External Candidates and Prospects'.

IMPACT ON OTHER AREAS

Within Dynamic Candidate Pools, you can now add Skills Cloud skills to the search criteria.

OTHER KEY INFORMATION

For the system to suggest skills, prospects must upload their resume. Suggested skills will have the word (suggested) appended when they appear. Prospects can remove any suggested skills they don't wish to include and can add additional skills. Once Skills Cloud is enabled, it cannot be disabled.



Learn More

Regenerate Employment Agreement Documents

Low impact

Low effort

Optional

FEATURE RELEASE AT A GLANCE

Workday has introduced a new task and business process that allows customers to regenerate an Employment Agreement document with corrected data after completing a hire.

WHY CONSIDER THIS RELEASE

This feature simplifies the process of changing details on an employment agreement and reviewing the updated document for candidates and pre-hires. It enhances hiring efficiency by reducing manual effort and compliance risks.

YOUR NEXT STEPS

To use this feature, you'll need to configure the 'Regenerate Employment Agreement Documents' business process and security policy. Then, add the 'Generate Document' followed by the 'Review Document' steps to the 'Regenerate Employment Agreement Documents' business process definition.

OTHER KEY INFORMATION

Adobe Sign and Docusign are supported in this feature.

Learn More

Configure Job Requisition Fields

Low impact

Low effort

Optional

FEATURE RELEASE AT A GLANCE

Workday has introduced a feature that allows you to hide or require, for specific security groups, certain fields on job requisition tasks. You will now be able to use Configure Optional Fields to hide or display the following on Start Job Requisition:

- Replace a worker
- Add a worker

If you display the Add a Worker field, you will be able to hide or display:

- Create new position
- Select an existing unfilled position

If you display the Replace a Worker field, you can choose to hide or display:

- Yes
- No, create a new position for this job

You will now be able to use the Configure Optional Fields task to hide or show the Create New Position and For Existing Position fields on:

- Create Job Requisition
- Copy Job Requisition
- Copy Job Requisition (Mobile)
- Copy Evergreen Requisition to Create Job Requisition
- Create Job Requisition Sub Process

Workday will rename the Create New or For Existing Position field to Position Type on these mobile tasks:

- Create Job Requisition
- Copy Job Requisition

WHY CONSIDER THIS RELEASE

This update enhances efficiency by giving customers more control and flexibility to customise job requisition tasks according to their organisation's specific needs.

YOUR NEXT STEPS

To implement this feature, use the 'Configure Optional Fields' task to hide the ability to create new positions or select existing positions as part of 'Create Job Requisition/Start Job Requisition'.

Learn More

Worktags On Time Off

Low impact

Moderate effort

Optional

FEATURE RELEASE AT A GLANCE

Workday has expanded its functionality to support the addition of worktags to time off entries. These can be added during the process of requesting time off or through the time tracking feature.

WHY CONSIDER THIS RELEASE

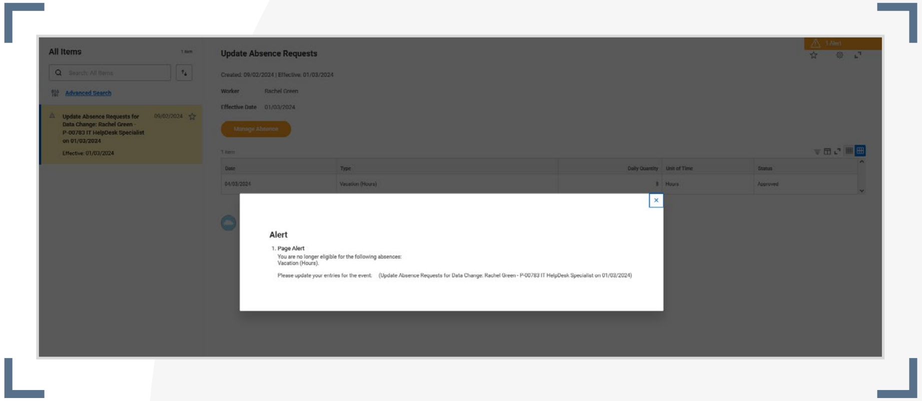
The support for worktags on time off entries allows these entries to be reported against different worktags, such as Cost Centers or Locations. This enhancement, a highly requested feature, will significantly improve reporting capabilities.

YOUR NEXT STEPS

To enable worktags for absences, use the ‘Maintain Worktag Usage’ task and then modify the absence column. Subsequently, time off entries need to be altered to incorporate the worktag.

IMPACT ON OTHER AREAS

- Integrations.
- Customers must enable the new absence calendar to use this feature



Learn More

New Instance Value Calculations

Moderate impact | Moderate effort | Optional

FEATURE RELEASE AT A GLANCE

Workday is introducing three new fields available for use within accrual calculations:

- 1. Average Monthly Working Hours for Worker
- 2. Average Weekly Working Hours for Worker
- 3. Average Monthly Working Days for Worker

WHY CONSIDER THIS RELEASE

These new calculations provide alternative methods to calculate accruals for workers, which can help eliminate any existing workarounds that may be in place.

YOUR NEXT STEPS

Review if any of your existing accruals are using workarounds and consider updating your absence plan configuration accordingly

Automated Absence Accrual Step Available On Collective Agreement Business Processes

Low impact

Low effort

Optional

FEATURE RELEASE AT A GLANCE

You can now configure the Automated Accrual Adjustment service as a step on these business processes:

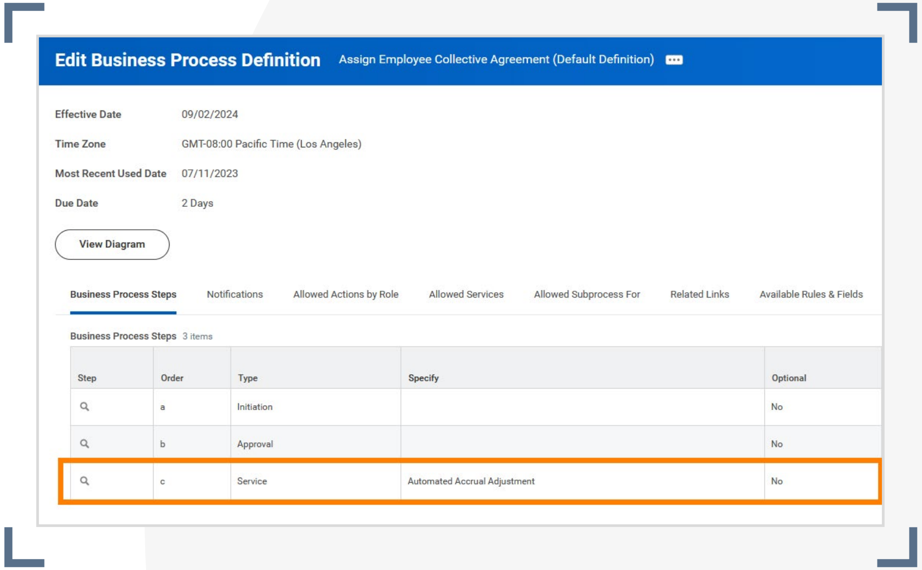
- Assign Collective Agreement
- End Collective Agreement

WHY CONSIDER THIS RELEASE

This update reduces the need for manual interventions when collective agreements are changed for an employee.

YOUR NEXT STEPS

To implement this feature, update the business process to include the new service step.



Additional Fields Available To Support Long Service Leave Configuration

Low impact

Low effort

Optional

FEATURE RELEASE AT A GLANCE

Workday has introduced four new fields that can be utilised in the absence management calculation engine:

- Worker Years of Service based on Recent Country Location as of Period Start Date
- Worker Years of Service based on Recent Country Location as of Period End Date
- Worker Date of Recent Country Location Change as of Period Start Date
- Worker Date of Recent Country Location Change as of Period End Date

WHY CONSIDER THIS RELEASE

This update will eliminate any workarounds being used to allow the accruals to be calculated correctly under these circumstances.

YOUR NEXT STEPS

Review your accrual calculations and adjust as needed to implement this feature.

Manage Ineligible Absences During Change Job

Low impact

Low effort

Optional

FEATURE RELEASE AT A GLANCE

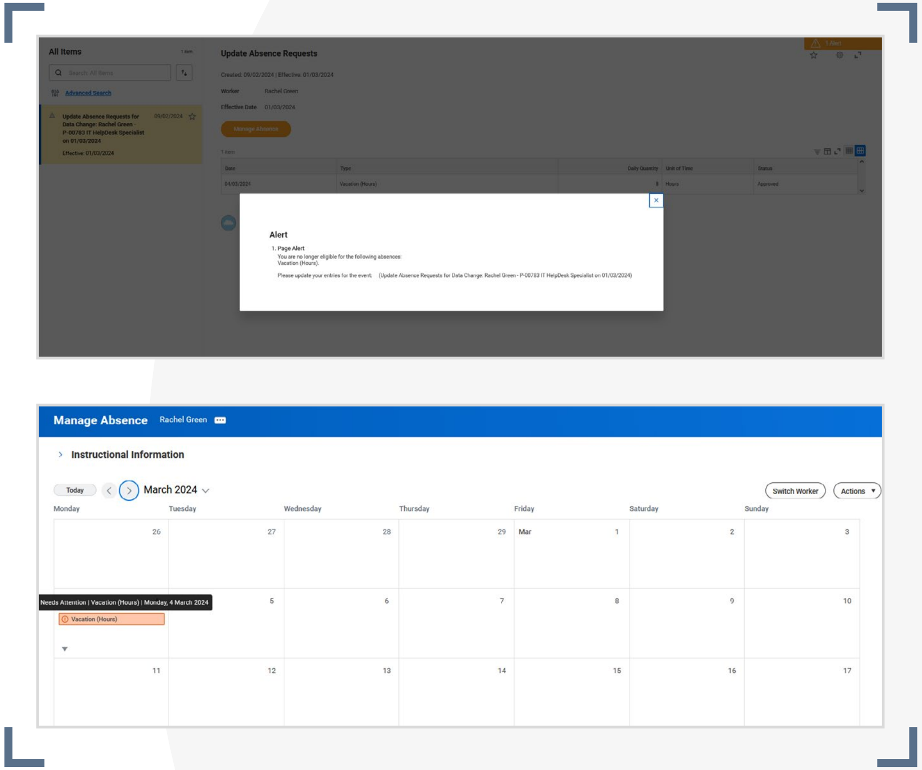
The Change Job business process now includes an "Update Time Off Request" subprocess. This subprocess creates inbox tasks for assigned users, encouraging them to take action on time offs that are no longer eligible.

WHY CONSIDER THIS RELEASE

This update simplifies the management of time offs that become ineligible following a job change.

YOUR NEXT STEPS

To implement this feature, update the change job business process with this new action step.



Learn More

Configurable Fields For Personal Information

Moderate Impact | Moderate Effort | Optional

FEATURE RELEASE AT A GLANCE

Workday now allows you to gather specific personal information data relevant to your organisation, which can support compliance reporting and other local needs. You can collect two different sections of Data: "Country Specific" (when country specific drop-down values are needed) and "Non Country Specific" (when global drop-down values are needed). You can configure up to three different Personal Information Data types in each section.

WHY CONSIDER THIS RELEASE

With the increasing number of data points requested by organisations to support their diversity reporting, these new configurable fields allow businesses to gather this type of data point according to their specific needs, rather than following a global definition. A timely use case for this release is to record "Carer status" in the UK, supporting new legislation regarding time off for carers.

EFFECTS ON OTHER AREAS

The cross functional impact depends on the fields being configured for an organisation. For example, in the case of recording "Carer Status" for the UK, this could be used in conjunction with a new Absence Type of "UK Carer Leave".

YOUR NEXT STEPS

This update is optional. To implement this feature, carry out the following steps:

- Enable and set up the new Person Data and Self-Service domains for the personal information sections you're configuring.
- Use the NEW "Configure Personal Information Sections" task to define the drop-down values for the fields.
- Use Maintain Custom Labels task to override the delivered labels for configurable fields and sections.
- Use Maintain Localisation Settings task to enable and make the fields required for specific countries.
- Add new reporting fields to existing reports or build new reports to report on the new configurable fields data.

OTHER KEY INFORMATION

Only available for workers

Learn More

Hire Business Process Enhancements

Low impact

Low effort

Optional

FEATURE RELEASE AT A GLANCE

Workday has updated the "Hire Employee" task with a different look and feel. Contact information entered on the pre-hire record, as well as information from Recruitment (if you are using the Recruitment module) such as the Recruiter and if the new hire was referred, will now be displayed in a panel to the right of the screen. The information available in this right-hand panel is configurable, allowing you to choose what information to show or hide.

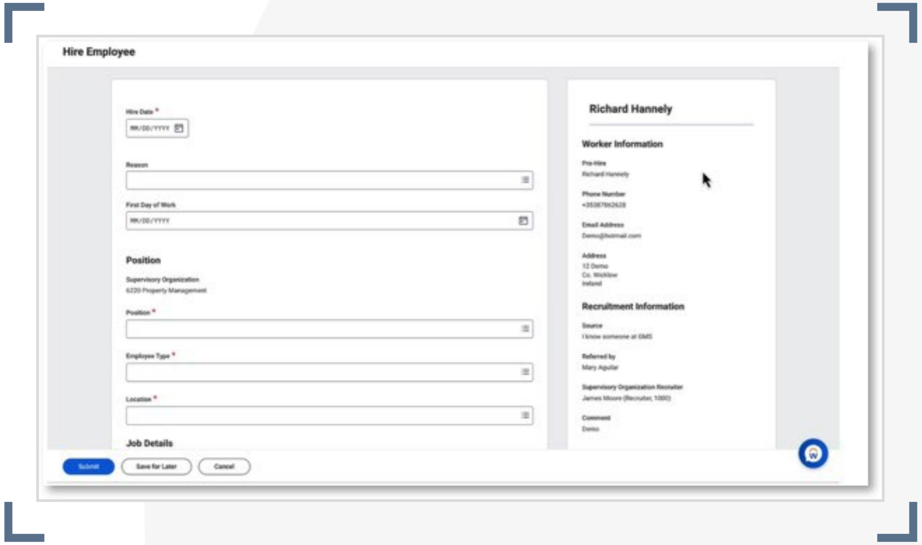
WHY CONSIDER THIS RELEASE

This update improves user experience by grouping fields logically and presenting them in one large screen rather than in different sections, making navigation easier. Having the information in the right-hand panel facilitates reaching out to relevant partners if questions arise while running the Hire process.

YOUR NEXT STEPS

While this update is currently optional, it may become mandatory in a future release. To implement this feature:

- Use the "Maintain Feature Opt-In" task.
- Configure Optional fields to determine which fields to hide



Learn More

Active Consent Preferences For Personal Information

Moderate impact | Moderate effort | Optional

FEATURE RELEASE AT A GLANCE

Workday has introduced a new task that will appear to the employee when they initiate the "Change Personal Information" screen. This feature enables you to actively obtain consent from employees for the collection and use of their personal data.

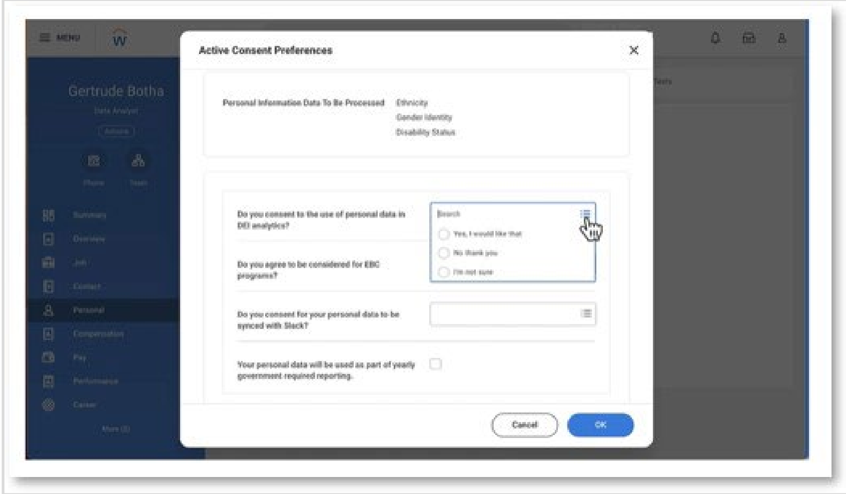
WHY CONSIDER THIS RELEASE

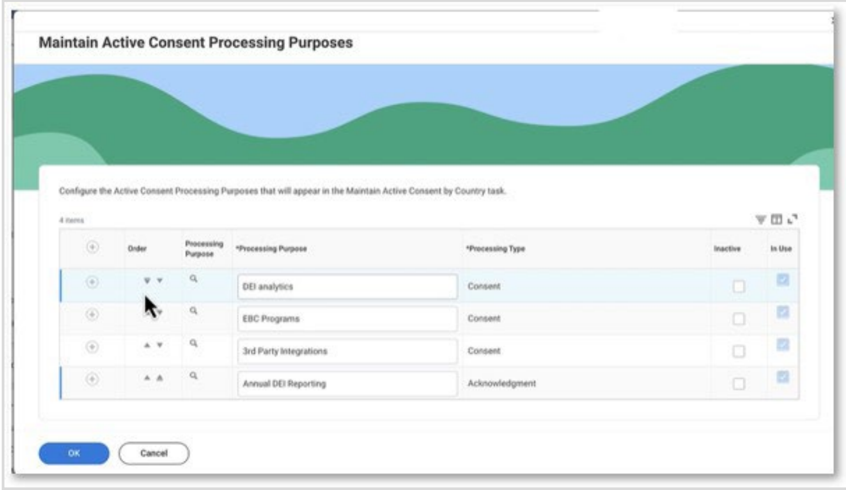
This update places the collection of consent at the forefront each time employees maintain their personal information, eliminating any doubt about an employee's consent decision. It also supports data purging with new data points that specifically indicate if an employee has not consented to the retention and processing of their data.

YOUR NEXT STEPS

This update is optional. To implement this feature:

- Enable the Active Consent Functional Area.
- Enable and set up domain security policies for these domains:
  - Set up: Active Consent
  - Self-Service: Active Consent
  - Active Consent
- Use the "Maintain Active Consent 'Processing Purposes' task to identify the various ways personal data will be processed.
- Use the 'Maintain Active Consent by Country' task to configure Active Consent by country.
- Build custom reports for HR
- Admins or HR Partners to view Active Consent Preferences





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Workday Tasks In Journeys Experience

Low impact | No effort | Mandatory

FEATURE RELEASE AT A GLANCE

Workday has simplified the user experience in a Journey. Now, journey recipients can access Workday tasks without navigating away from the journey. You can configure whether a Workday task should open in the Journeys Employee Self Service (ESS) experience or in a new tab.

WHY CONSIDER THIS RELEASE

This update allows journey recipients to view or take action on Workday tasks while remaining inside the Journeys Employee Self Service (ESS) experience. It enhances user experience and efficiency by reducing navigation.

YOUR NEXT STEPS

This feature is mandatory and automatically available. To start using this enhancement, access your past Journeys configuration and switch 'Open Task within Journeys' to 'On'. Newly created task steps in Journey configurations are 'On' unless you alter the default behaviour using the 'Edit Tenant Setup – Journeys' task.

Learn More

Function: HCM

Document Upload On Journey Steps

Low impact

No effort

Mandatory

FEATURE RELEASE AT A GLANCE

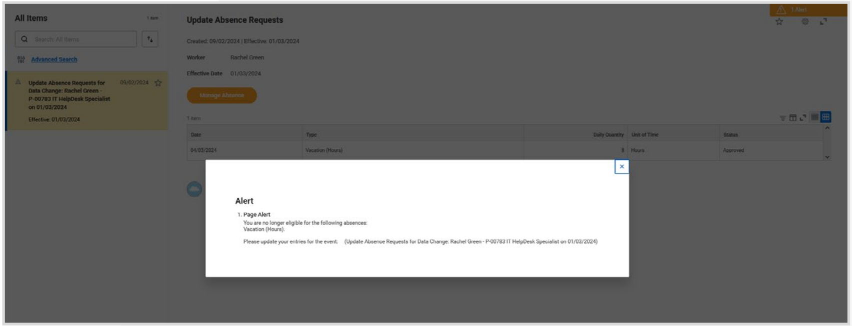
You can now upload relevant documents for your journey recipients to view, download, and print on their journey steps. Supported file formats are .pdf, .doc, and .docx.

WHY CONSIDER THIS RELEASE

This update improves the user experience as all necessary information can be provided within the Journey, making it easier and more efficient for users to access important documents.

YOUR NEXT STEPS

This feature is automatically available to all customers subscribing to Journeys.



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The Value Of Strategic Workday Release – A Case Study

After a recent Workday 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, emphasising 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 recognising their broader impact on user experience and organisational operations.

What they did next

The bank recognised 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 analysing 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 2024 R1 or Release Management, our team of experienced Workday consultants is here to help. Get in touch.

Call: +44 (0)203 150 3400
Email: info@preos.co.uk
Visit: 16b New Quebec Street, London W1H 7RU
Web: www.preos.co.uk

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