

# Workday 2024 Release 2 Essentials.

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# Understanding Workday Releases

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## 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.

If you'd like more guidance our team is here to help. Get in touch.

[www.preos.co.uk](http://www.preos.co.uk)

[info@preos.co.uk](mailto: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

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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 wish-list 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.



# 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.



# Release Features 2024 R2

# Workday Updates The Tenant Analyser Tool To Provide Warnings When Non Effective Dated Fields are Used



Moderate impact



No effort



Optional

## FEATURE RELEASE AT A GLANCE

Workday has delivered new validations in the Tenant Analyser to help you identify Absence component configurations in your tenant which use calculations that do not reference the most recent service dates, along with providing new instance value calculations that you can use in absence to support effective dating on service dates. This works in conjunction with the new HCM feature which allows you to add effective dates to service date changes on the Edit Service Dates task - this new feature currently remains on the Maintain Feature Opt-Ins report until 2025R1, when Workday will make it automatically available in Production

## WHY CONSIDER THIS RELEASE

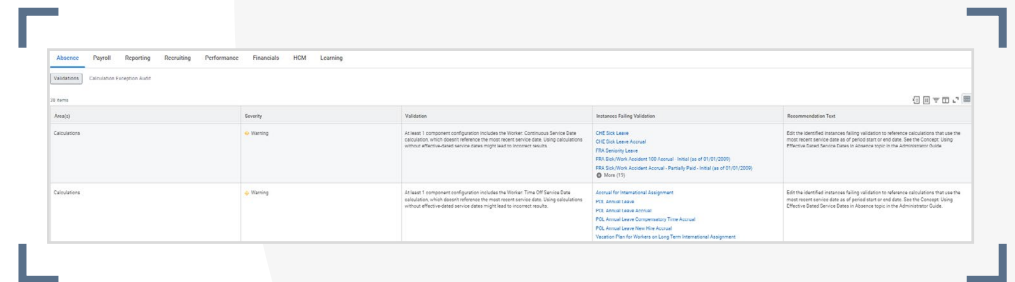
When you run the Tenant Analyser report, navigate to the calculation row under the Area column of the Absence > Validation tab to view components that need your attention. The below fields may appear in your Tenant Analyzer results and should be updated to new IVCs which reference the most recent service date:

- Worker: Benefits Service Date
- Worker: Continuous Service Date
- Worker: Original Hire Date

- Worker: Retirement Eligibility Date
- Worker: Seniority Date
- Worker: Time Off Service Date

## YOUR NEXT STEPS

If you don't take any action and continue to use service date IVCs that don't reference period start date or period end date and you make service date changes with future-effective dates, your calculations will not reference the proposed service dates until the effective date is equal to today's date or a date in the past. This may impact your worker's accruals and future balance projections will not reflect the changes.



# Buy Time Off



High impact



High effort



Optional

## FEATURE RELEASE AT A GLANCE

Workday has delivered the ability to configure time offs that can be purchased so that workers can buy time off.

## WHY CONSIDER THIS RELEASE

Workday gives you the ability to configure time offs that your workers can buy within Workday, allowing an automated way to handle this process within the system.

## YOUR NEXT STEPS

Set up security for the Buy Time Off business process security policy in the Time Off and Leave functional area and create your business process. Create an accrual and enable the Allow to Buy Time Off check box. Enter the Buy Time Off Display Name (ideally the same name as the time off that users request). Navigate to the Buy Options tab and complete the following fields: Available to Buy During, Maximum Limit to Buy, Allowable Increments to Buy and Pay Rate for Adjustments. Consider whether you want workers to be able to buy time off at anytime, or if you want to restrict the option to buy time off to a fixed period - if using a fixed period, you must select an existing Buy Schedule or create one using the Create Schedule for Buying Time Off task.

## EFFECTS ON OTHER AREAS

If using Workday payroll, you will need to consider creating memo earning or a negative earning. If you use 3rd party payroll services, consider how you will pass this information to your 3rd party payroll provider.

**Buy Time Off** X

Type of Time Off \* Annual Leave Buy Time Off

Days \* 2

Note You're eligible to buy time off up to 8 days in increments of 1.

enter your comment



# Accrual Expiration



Moderate  
Impact



Moderate  
Effort



Optional

## FEATURE RELEASE AT A GLANCE

Workday has introduced an Accrual Expiration framework that allows individual time off accruals to expire relative to the date accrued.

There is a new section on the Time Off Plan Overrides tab of the accrual called Expiration Override, alongside a new Maintain Accrual Expiration Overrides Task that allows you to override expiration rules defined on an accrual for a worker.

## WHY CONSIDER THIS RELEASE

This reduces the manual effort of adjusting and overriding balances to comply with company policy and regulations. This provides an automated way to expire balances after a period of time and provides a user friendly task to manage adhoc exceptions for specific workers. In addition, Workday have added a new column called 'Expiring Accruals Forfeited in Period' to all standard time off balance reports alongside a new self-service My Expiring Accruals report enabling workers to make informed decisions about their absence balances and requests.

## YOUR NEXT STEPS

Edit an existing accrual or create a new accrual and define the Amount of Time Before Expiration and the Unit of Time Before Expiration. You also have the option to select Include Prior Balance Period Accruals in Upper Limit Calculation should you wish expiring accruals to be included in the time off plan balance upper limit calculations.

Note: If you are editing an existing accrual in your tenant to uptake accrual expiration, you need effective date your changes using either a current or a future period.

### Expiration Override

Amount of Time Before Expiration

Unit of Time Before Expiration

Include Prior Balance Period Accruals in Upper Limit Calculation

### Maintain Accrual Expiration Overrides

Worker	Expiration Override	Amount of Time Before Expiration	Unit of Time Before Expiration	Include Prior Balance Period Accruals in Upper Limit Calculation	Comment
John Doe	14	Days	<input checked="" type="checkbox"/>	Expiring due to agreement	

# Step Progression Date Override (Core Comp)



Moderate  
Impact



Moderate  
Effort



Optional

## FEATURE RELEASE AT A GLANCE

This release enables you to override a worker's Workday-calculated next-step progression target date with a future date of your choosing.

## WHY CONSIDER THIS RELEASE

Step progression date override provides you with greater flexibility in managing your workers' step progression.

## YOUR NEXT STEPS

- Configure the business process security policy and default definition for the Request Step Progression Date Override business process.

## OTHER KEY INFORMATION

Workday has delivered the new task Request Step Progression Date Override as an initiating action for this business process. These tasks have allowed actions on the business process:

- Review Step Progression Date Override
- Revise Step Progression Date Override

# Stock Custom Calculations



Moderate  
impact



High  
effort



Optional

## FEATURE RELEASE AT A GLANCE

Stock Custom Calculations can be done with Workday 2024R2 updates.

## WHY CONSIDER THIS RELEASE

Workday 2024R2 updates the Create and Edit Compensation Review Calculation Table tasks.

If the stock is being used by customers, this is a great enhancement for more detailed calculations.

## YOUR NEXT STEPS

- Create a compensation review calculation table and select Custom Calculation Stock Currency for the input field.
- Add the Custom Calculation Stock fields to the grid as editable.
- Any custom reports for stock cycle to be updated with the new Custom Calculation Stock fields.

# New Statement Visible Column



No  
impact



No  
effort



Mandatory

## FEATURE RELEASE AT A GLANCE

New Statement Visible column in Compensation Review Statement reports

## WHY CONSIDER THIS RELEASE

Workday 2024R2 adds the new Statement Visible column to these reports:

- Compensation Review Statement History
- View Compensation Review Statements

You can now see at a glance which statements are visible to your workers.

## YOUR NEXT STEPS

- No action needed, the field will be automatically available.

The screenshot shows a report interface with a table. The table has a header row with columns: Employee, Printed Date, Print Status, Percent Complete, Compensation Review Statement, Statement Visible, and Actions. The 'Statement Visible' column is highlighted with an orange box. Below the table, it says 'No items available.' The report title is 'Include Subordinate Organizations' with a 'Yes' checkbox.

Employee	Printed Date	Print Status	Percent Complete	Compensation Review Statement	Statement Visible	Actions
No items available.						

# Data Entry Check in Compensation Review



Low  
Impact



Low  
Effort



Optional

## FEATURE RELEASE AT A GLANCE

Data Entry Check in Compensation Review.

## WHY CONSIDER THIS RELEASE

In Workday 2024R2, Workday increase the accuracy and reliability of manually entered numeric compensation review data.

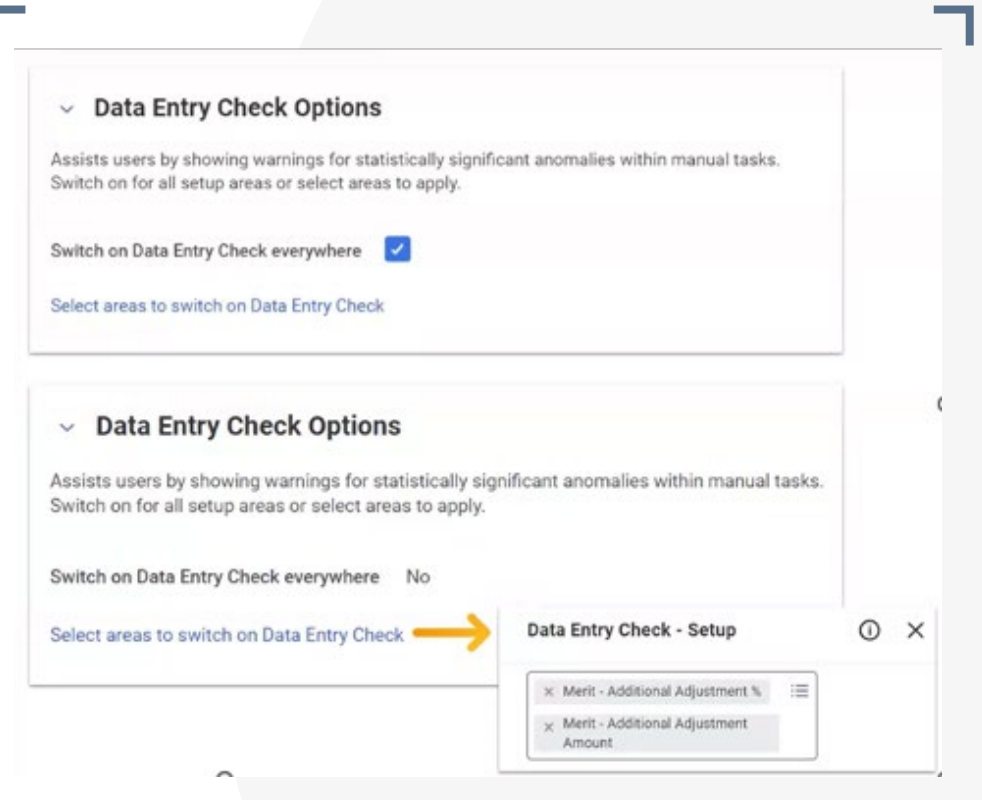
Workday uses machine learning on historical data to validate data entered into editable, numeric fields to identify anomalies.

## YOUR NEXT STEPS

Workday deliver the new Data Entry Check Options section to the Edit Tenant Setup - HCM task. If selected (default), Workday enables the Machine Learning Data Entry Check (DEC) functionality for HCM.

- If you don't want to use DEC, clear the check box.
- If you want to use DEC for only select fields, click Select areas to switch on Data Entry Check and clear the box of any fields you don't want DEC on. For compensation review, these are editable, numeric fields in the configurable grid.

When selected, Workday uses machine learning on successfully completed compensation review events to validate the data you enter in the selected fields.



### Alert

#### 1. Bonus Factor % (Tab 3 Row 4 Column 8)

The Bonus Factor % entered is outside historical norms. Verify the Bonus Factor % before proceeding.

# UI Changes in Compensation Review



Low Impact



Low Effort



Optional

## FEATURE RELEASE AT A GLANCE

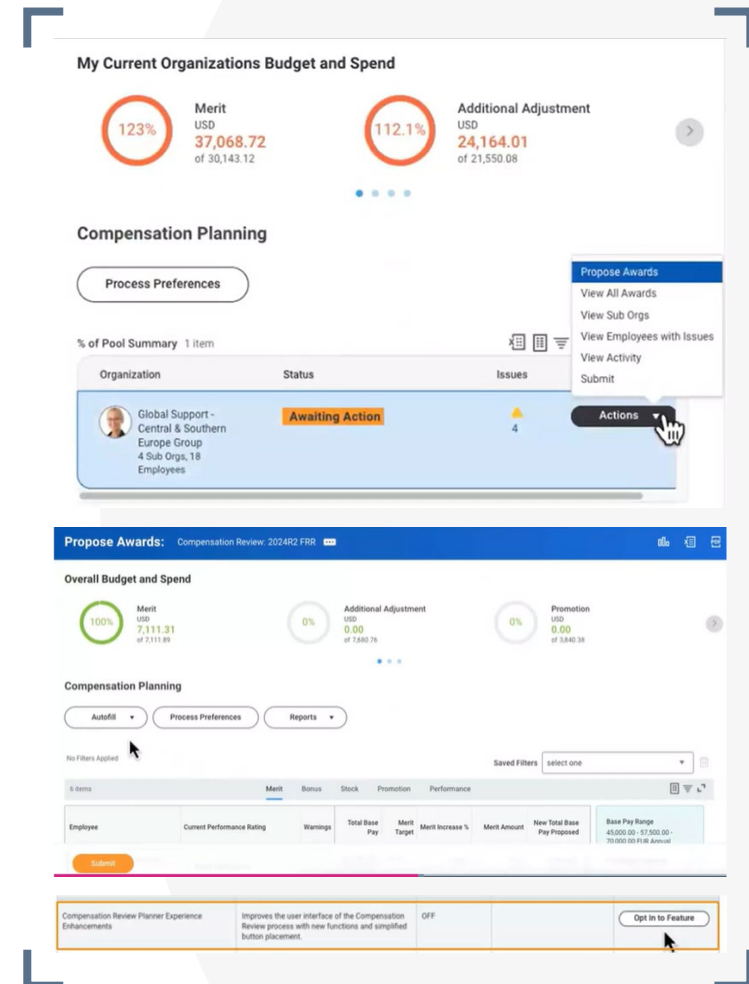
UI Changes in Compensation Review (trimming white space, labelling icons, enhancing the grid with new and simple tables, adding Saved Filter on the planning grid).

## WHY CONSIDER THIS RELEASE

- Easier and more intuitive UI for compensation review planners.
- Improve clarity, reduce clicks and enhance efficiency.
- Modern, visually appealing interface.
- Reduction in calls to HR and Compensation partners.

## YOUR NEXT STEPS

- Customers have a year to opt in to the new experience before it's automatically available for all customers. If customers have a compensation review process that will be in progress at the time 25R2 is released to production (September 2025), the UI will change automatically.



# Global Address Validation



Low Impact



Low Effort



Optional

## FEATURE RELEASE AT A GLANCE

Workday now validates addresses upon entry. An alert will show when an official postal agency does not recognise the address.

## WHY CONSIDER THIS RELEASE

Improved quality of address data in your tenant.

## EFFECTS ON OTHER AREAS

When you activate Global Address Validation in your tenant, it becomes available throughout Workday and can validate addresses for Candidates, Students, and Workers.

## YOUR NEXT STEPS

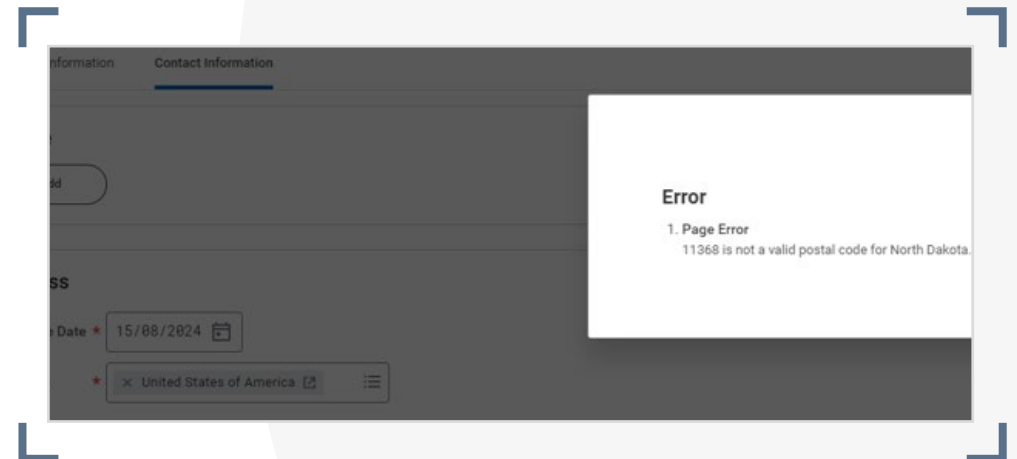
- For MSA subscriptions, use the Innovation Services Opt-In task to enable Global Address Validation. Then, in Maintain Localisation Settings, activate Global Address Validation under Contact Information.
- For UMSA, directly access Maintain Localization Settings and activate Global Address Validation under Contact Information. Select the Active box to enable.

## OTHER KEY INFORMATION

With this release, you can't use Global Address Validation;

On the Career Site, On the Student Career Site, Through REST endpoints and with web services.

Workday have provided a list of 34 countries in which this feature is available in.



# Address Lookup



Low Impact



Low Effort



Optional

## FEATURE RELEASE AT A GLANCE

Workday continues to improve how you look up addresses by enabling you to enter only a few characters of an address. You receive a suggested list of addresses to search.

## WHY CONSIDER THIS RELEASE

Helping you quickly find addresses improves accuracy and enhances data integrity and uniformity for integrations that may require specific data and address formats.

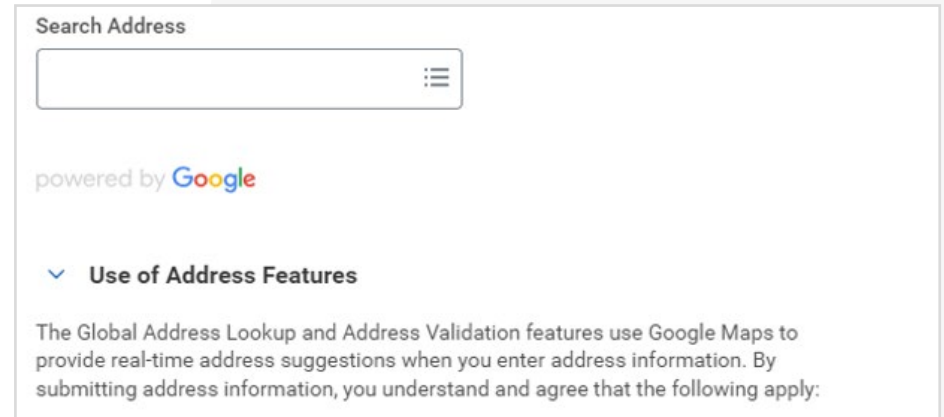
## YOUR NEXT STEPS

- Existing customers: if you haven't opted into Address Lookup, access the Innovation Services Opt-In task and select Global Address Lookup > Global Address Lookup Using Third-Party Services. Access the Maintain Localisation Settings task and enable Global Address Lookup Using Third-Party Services by country.
- New customers: Access the Maintain Localization Settings task and enable Global Address Lookup Using Third-Party Services by country.

## OTHER KEY INFORMATION

With this release, Workday has enabled Address Lookup for more than 200 countries.

Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement.





# Percent-Based Commission Plans (Compensation)



Low  
Impact



Low  
Effort



Optional

## FEATURE RELEASE AT A GLANCE

Workday 2024R2 makes it easier to meet global business needs with percent-based commission plans.

Note: You can't include percent-based commission plans in a compensation review process.

## WHY CONSIDER THIS RELEASE

You can now use an On Target Earnings structure that sets commission target as a percent of a compensation basis.

## YOUR NEXT STEPS

- You must create percent-based commission plans to uptake the new feature.

## OTHER KEY INFORMATION

Changes have been made to:

- Request Compensation Change Commission Tasklet
- Create Percent-Based Commission Plan
- Edit Commission Plan
- View Commission Plan
- Reporting

**Create Commission Plan**

Effective Date \* DD/MM/YYYY

\*  Amount Based Plan

Percent Based Plan

Cancel OK

# Hire Employee (Additional Info & Redesign)



Moderate  
Impact



No  
Effort



Mandatory

## FEATURE RELEASE AT A GLANCE

Workday redesigns the Search for Person and Search Results interfaces in the Hire Employee task by introducing new search criteria fields and organising them into sections. The update also includes displaying Pre-Hire information and previous role details for terminated workers in search results.

## WHY CONSIDER THIS RELEASE

This update improves the user experience and streamlines the hiring process for your organisation by providing more accurate and detailed results that are easier to scan. If you rehire a previous worker, you can find them more efficiently using their previous role information.

## YOUR NEXT STEPS

- Automatically available.
- Access the Hire Employee task to view new interfaces.

The screenshot displays the 'Hire Employee' task interface. On the left, the 'Search for Person' section is visible, featuring a 'Country' dropdown menu set to 'United States of America'. Below this, there are expandable sections for 'Personal Details' and 'Contact Details'. The 'Personal Details' section includes input fields for 'First Name', 'Middle Name', and 'Last Name', along with a 'Workday ID Type' dropdown menu. A 'Search' button is located at the bottom of this section. On the right, the 'Search Results' section is shown, with the prompt 'Search for a person to initiate hire'.

# Hire Employee (Consolidated Hire Business Process)



Low  
Impact



No  
Effort



Mandatory

## FEATURE RELEASE AT A GLANCE

Workday have enabled customers create a consolidated hire business process.

## WHY CONSIDER THIS RELEASE

This consolidated experience helps to streamline the hiring process and increase efficiency by reducing manual effort. It also now enables you to add payment elections for a worker during the hiring process, which helps to reduce administrative workload and the likelihood of payment delays.

## YOUR NEXT STEPS

- Initiate the Hire Employee task to view and manage the consolidated business process.
- When you configure Assign Pay Group and Payment Election Enrollment Event as subprocesses, we recommend that you also configure Change Organization Assignments for Worker. This ensures accuracy as well as efficiency in processing payroll for this worker.
- You must select a company on the Change Organization Assignments for Worker step to add a worker to a Workday payroll pay group. You don't need to do this for third-party pay groups.
- To add payment elections for a worker that you can use in payroll, you must have:
  - Configured payment election rules.
  - Assigned the worker to a pay group.

## OTHER KEY INFORMATION

For any exit validations that you've created for sub business processes: If you want them to trigger during Hire consolidation, you must configure them on Hire initiation.

# Job Profile (Effective Dating Enhancements)



Moderate  
Impact



No  
Effort



Mandatory

## FEATURE RELEASE AT A GLANCE

Workday enhances the Job Profile setup data by adding effective dating to fields that previously weren't effective dated.

## WHY CONSIDER THIS RELEASE

This update ensures consistency in job profiles by making all fields effective-dated, allowing you to more easily implement planned changes and track them over time.

## YOUR NEXT STEPS

- Automatically available.

## OTHER KEY INFORMATION

Workday have added effective dating to fields within Skills, Category Details, Compensation and Qualifications.

# Job Profile (User Interface)



Low  
Impact



No  
Effort



Mandatory

## FEATURE RELEASE AT A GLANCE

Workday have updated the job profile user interface and enhanced several job profile fields.

## WHY CONSIDER THIS RELEASE

This update improves the user experience for maintaining job profiles, making it easier for you to add all required data by grouping fields in a more logical order, emphasising skills, and displaying reference information in one location.

## EFFECTS ON OTHER AREAS

Customers will need to evaluate their training materials to determine if they require updates because of the new user interface.

## YOUR NEXT STEPS

- Automatically available.

The screenshot shows the 'Edit Job Profile' interface for 'Customer Service Operations Support'. The interface is divided into several sections:

- Description:**
  - Job Profile Summary:** A text area containing the text: "Responsible supporting customer service representatives with their day-to-day business and technical needs. Maintain departmental quality and productivity standards."
  - Job Description:** A rich text editor with a toolbar (Normal, Bold, Italic, Underline, Link, Unlink, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo) and a text area.
  - Additional Job Description:** Another rich text editor with the same toolbar and text area.
- Skills Information:**
  - Skills:** A section with a 'View Skill Level Descriptions' button and a table for 'Skill Attributes'.
  - Table:** A table with columns 'Required', 'Skill', and 'Skill Level'. The table is currently empty, showing 'No Data'.
- Category Details:** A section at the bottom of the form.

# Job Profile (Web Services)



Low  
Impact



Low  
Effort



Optional

## FEATURE RELEASE AT A GLANCE

Workday delivers updates to web services for job profiles.

## WHY CONSIDER THIS RELEASE

This enables you to make bulk updates to job profiles, and work in conjunction with the Manage Job Profile business process.

## YOUR NEXT STEPS

- Configure the security for the new Submit Job Profile initiating action on the Manage Job Profile business process security policy .

## OTHER KEY INFORMATION

If you don't set up the Submit Job Profile initiating action on the Manage Job Profile business process security policy, you won't be able to use the new web service.

If you don't use the new Submit Job Profile web service, and you continue to use the Put Job Profile web service, you won't be able to fully leverage the Manage Job Profile business process.

# Payment Elections On Hire



Low  
Impact



Low  
Effort



Optional

## FEATURE RELEASE AT A GLANCE

With this release, Workday enables you to configure the Hire business process to include a payment elections subprocess.

## WHY CONSIDER THIS RELEASE

Adding payment election information during the hire process reduces administrative workload and the likelihood of payment delays.

## YOUR NEXT STEPS

- To configure the Payment Election Enrolment Event as a subprocess of the Hire business process, edit the business process definition to add Manage Payment Elections as an action step.

# Workday Help Case Management (Case Owners Can Reopen Cases - Home Experience)



Moderate  
Impact



Low  
Effort



Optional

## FEATURE RELEASE AT A GLANCE

You can now provide case owners in your organisation the option to reopen their resolved cases from the Workday Help Center if they're dissatisfied with the resolution.

## WHY CONSIDER THIS RELEASE

This feature reduces the amount of time that it takes case owners to receive assistance and eliminates frustration by enabling them to reopen their own resolved cases.

## YOUR NEXT STEPS

- Customers need to enable the Enable Case Owners to Reopen Cases field in the Reopen Cases section of the Edit Tenant Setup - Help task.



# Change Job User Experience (3 New Features)



Moderate  
Impact



Critical  
Effort



Optional

## FEATURE RELEASE AT A GLANCE

There is now an enhanced user interface, machine learning recommendations for compensation change and enhanced compensation change templates.

## WHY CONSIDER THIS RELEASE

This feature reduces manual data entry and improves accuracy when changing compensation for a worker. New compensation change templates allow for a more streamlined and customisable compensation process, tailored to customer needs.

## YOUR NEXT STEPS

- To implement the Enhanced Propose Compensation Change feature, create or update a compensation change template and enable the new UI. Opt-in to Machine Learning recommendations via Innovation Services, then use the Change Job process to apply compensation changes. Configure templates and ensure alignment with business processes and security groups for accurate application.

# Change Job User Experience (Change Job Templates New User Experience for Initiating Actions and Multiple Reasons)



Low  
Impact



Low  
Effort



Optional

## FEATURE RELEASE AT A GLANCE

This update enables you to leverage the simplified user interface for all initiating actions, and the flexibility to choose multiple reasons for a template.

## WHY CONSIDER THIS RELEASE

This feature allows you to deliver a consistent change job experience for users and customise templates to meet your organisation's needs. Additionally, by enabling the configuration of multiple reasons, it removes the need for duplicate templates.

## YOUR NEXT STEPS

- To enable the Change Job interface, use the Maintain Change Job Templates task and select the template.

# Change Job User Experience



Low  
Impact



No  
Effort



Mandatory

## FEATURE RELEASE AT A GLANCE

Workday have continued adding capabilities to the simplified user interface for job changes including consolidated subprocesses. Workday introduces several enhancements to the simplified user interface for Change Job to support a streamlined experience and provide users with valuable information.

## WHY CONSIDER THIS RELEASE

For change job templates using the simplified user interface, this feature delivers a more consistent experience and provides greater flexibility and guidance for job changes.

## YOUR NEXT STEPS

- Automatically available.

# Security for Personal Information Items



Moderate  
impact



Moderate  
effort



Mandatory

## FEATURE RELEASE AT A GLANCE

Workday enhances security on Personal Information prompts, report fields, and tasks.

## WHY CONSIDER THIS RELEASE

This enhancement provides users with a more consistent experience when securing Personal Information items, and prevents unintended access to data.

## YOUR NEXT STEPS

- Automatically available.

## OTHER KEY INFORMATION

ID Report Fields have been removed from the Public Reporting Items domain and been added elsewhere for:

- Custom ID Report Field
- Government ID Report Field
- Other ID related fields

It is recommended to test this by logging in as a user who could see this information via the 'Public Reporting Items' domains, to check if they are still able to access this information, now that the items are secured to more granular domains. Updates to domain security may be needed.

# Skill Assessments



Low impact



Low effort



Optional

## FEATURE RELEASE AT A GLANCE

Workday now supports structured skill assessments by enabling assessors to rate worker profile skills, job profile skills, and other skills for workers.

## WHY CONSIDER THIS RELEASE

By facilitating skill ratings by a trusted person, the new Assess Skills business process provides companies with more skill data and a deeper understanding of skill inventory to help inform their workforce planning decisions and strategic talent initiatives.

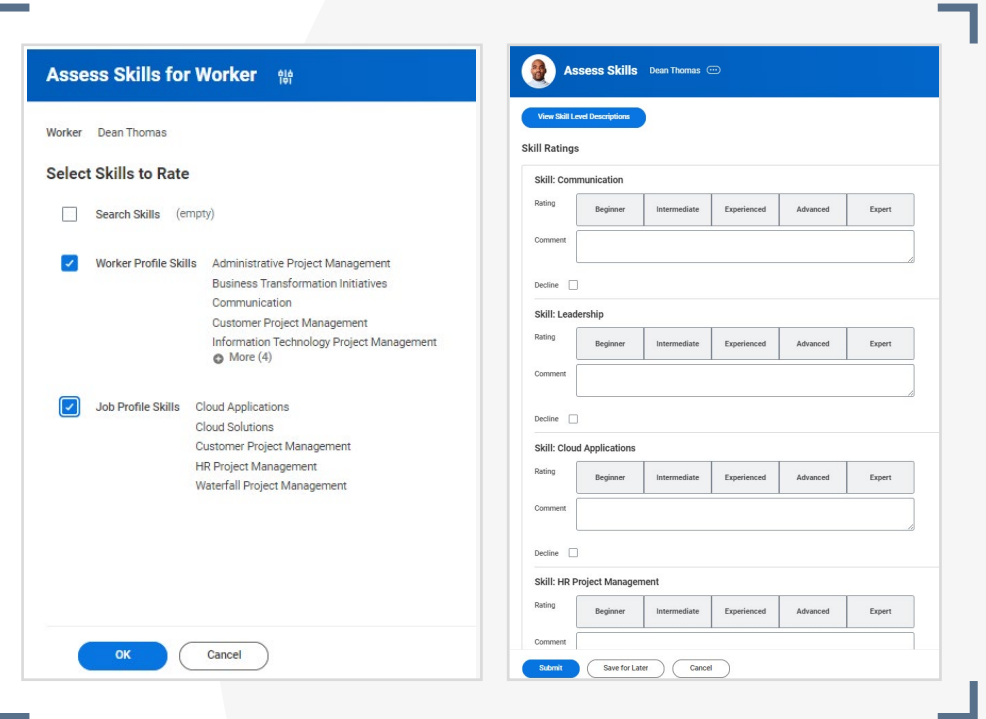
Managers and other assessors can rate workers' job profile skills, worker profile skills, and other skills on a 1-5 proficiency scale.

## YOUR NEXT STEPS

- 1) Creating the new business process Assess Skills
- 2) Domains to update under Worker Profile and Skills functional area:  
Person Data: Skill Assessment Data & Self-Service: Skill Assessment Data

Note: The Assess Skills business process doesn't support crowdsourced skills.

## EFFECTS ON OTHER AREAS



# Development Item Enhancements (Connecting Development Items And Skills; Enhanced UX For Career Hub)



High impact



No effort



Mandatory

## FEATURE RELEASE AT A GLANCE

Development Item Enhancements which include connecting development items and skills as well as enhanced UX for Career Hub.

## WHY CONSIDER THIS RELEASE

- Allowing employees to add up to 3 skills to develop on their development items, and those skills auto-add as skill interests.
- UI enhancements to improve usability
- Enhanced UX for Career Hub with suggested learning and flex teams

## YOUR NEXT STEPS

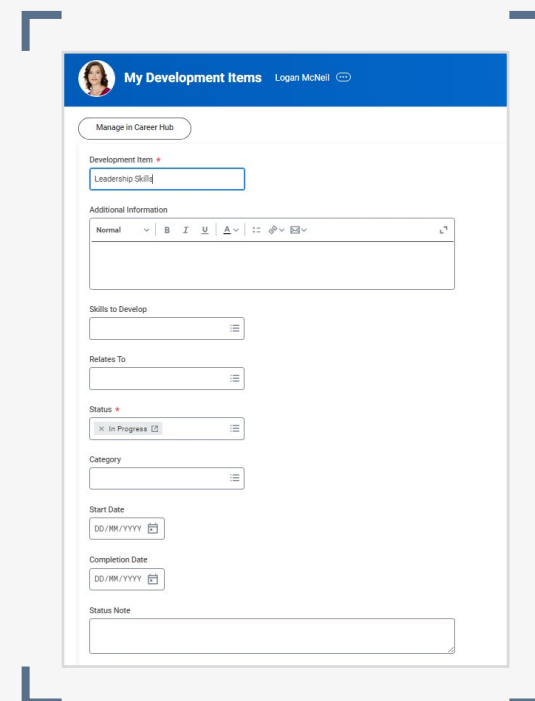
- Functionality is available automatically. If you are using development items (standalone or via Career Hub) no action is required.

## EFFECTS ON OTHER AREAS

- HCM (Skills), Learning (Learning Suggestions), Career Hub (UI changes), Flex Teams (Flex Teams suggestions)

## OTHER KEY INFORMATION

- Skills to develop on development items are auto-added as skill interests, they will be reportable.
- My Development Items and Development Items for Manager are available on mobile (automatically)
- Number of skills on development items will be limited to 3 to avoid noise.
- WD has moved a lot of fields under Detail section that were not very visible on the main page of Development Items.



# Career Pathing Enhancements



High  
impact



High  
effort



Mandatory

## FEATURE RELEASE AT A GLANCE

- Machine Learning (ML) logic enhanced for skill-based matching on suggested career steps
- Enable seniority levelling based on organisation's job or management levels

## WHY CONSIDER THIS RELEASE

- Increasing trust in AI/ML recommendations and Skills Cloud for career path seekers
- More realistic career step guidance that honours company-defined job hierarchies
- Smoother career path discovery that accelerates workforce readiness and engagement in career progression

## YOUR NEXT STEPS

- If Career Hub and Career Pathing is enabled:
  - Management Level or Job Leveling Hierarchy is needed to make the job seniority to be taken into account by the machine learning (prefix drives the logic, not the order) through Maintain Career Hub and Opportunity Marketplace.
  - Turn on Self Service: Career Hub Job Profile suggestions (View/Modify)
  - Turn on Skills Cloud synonyms (it is required to have an up to date job architecture)
  - Recommend to populate job profiles with skills to improve the experience of pathing based on skills and skill interests

## EFFECTS ON OTHER AREAS

- HCM (Management Level or Job Leveling Hierarchy, Skills)

# Ability To Do Bulk Updates On Multiple Goals



Moderate  
impact



Low  
effort



Optional

## FEATURE RELEASE AT A GLANCE

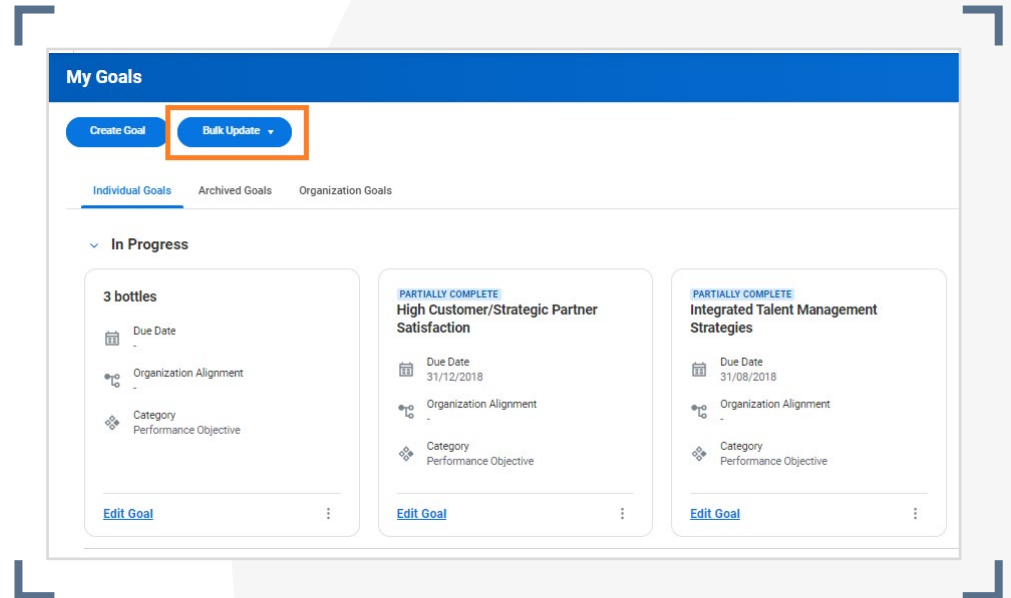
This feature provides the ability to create, delete, edit, review, and approve multiple goals at once. These changes only apply if the Goals User Experience Redesign Changes feature in the Maintain Feature Opt-Ins task is opted.

## WHY CONSIDER THIS RELEASE

Provides the ability to do bulk updates on multiple goals.

## YOUR NEXT STEPS

- Individual Goals task for multiple goals as an initiating action on the Manage Goals business process security policy needs to be enabled for the relevant security groups.





# Autosave For Guided Experience Employee Reviews



Moderate  
impact



No  
effort



Mandatory

## FEATURE RELEASE AT A GLANCE

Workday delivers Autosave for Guided Experience Employee Reviews for desktop users, automatically saving work every 90 seconds.

## WHY CONSIDER THIS RELEASE

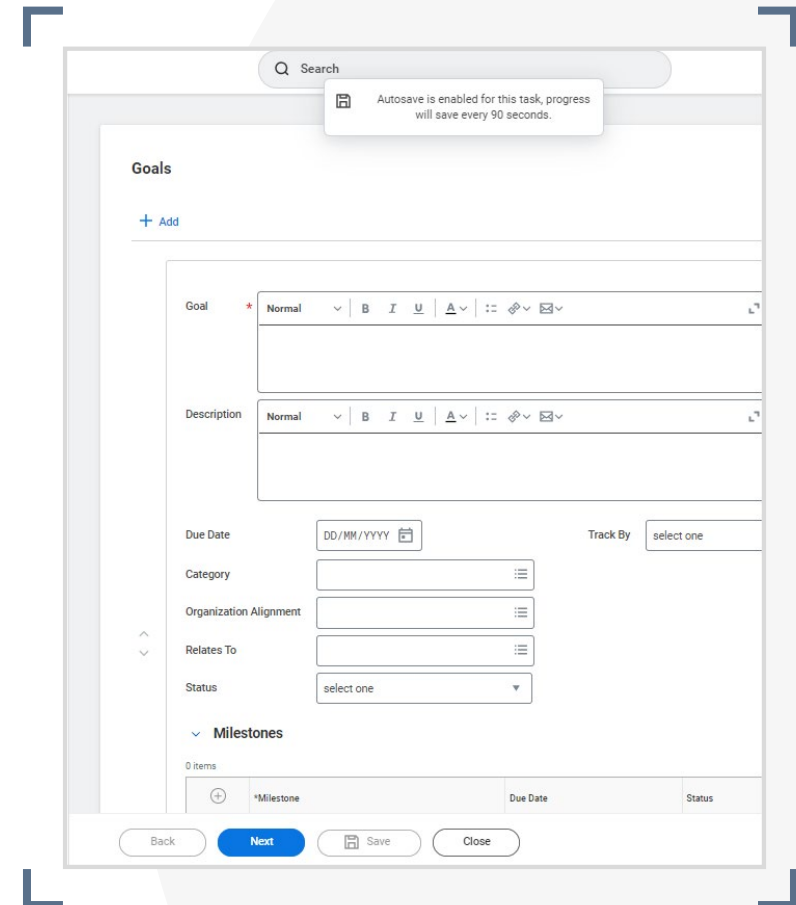
The work will be saved automatically every 90 seconds.

## YOUR NEXT STEPS

- Automatically available within the Guided Experience employee review template for desktop users.

## OTHER KEY INFORMATION

- The background process runs every 90 seconds for supported Guided Experience employee review sections. The autosave feature isn't available for these steps: Acknowledgment, Review and Submit



# Feedback User Experience Responsive Design



Low  
impact



No  
effort



Mandatory

## FEATURE RELEASE AT A GLANCE

Workday enhance the visual appeal of the feedback user experience with a dynamic presentation.

## WHY CONSIDER THIS RELEASE

Workday has changed the space on the pages below and minimise content gaps on these feedback tasks:

- Give Feedback
- Get Feedback on Self
- Get Feedback on Worker
- Maintain Feedback Setup

## YOUR NEXT STEPS

- Automatically available

**Maintain Feedback Setup**

**Give Feedback**

- Default: Give Feedback to Confidential
- Disable Confidential Feedback
- Disable Anonymity
- Disable Decline Feedback
- Disable Private Feedback
- Disable Feedback Badges
- Enable Confidential Feedback for Give Requested Feedback
- Enable Private Feedback for Give Requested Feedback

**Get Feedback**

- Disable Confidential Feedback
- Disable Private Feedback
- Default: Get Feedback on Worker is Confidential
- Disable Expiration Date

Require Feedback Template

**Default Templates**

Feedback on Self

Feedback on Worker

Get Feedback on Self
Get Feedback on Worker

Get Feedback on Self: 0 items

+	Order	*Condition Rule	*Feedback Template
No Data			

OK
Configure Talent Tags
Maintain Feedback Badges
Cancel

# Job Descriptions Generation on Job Requisitions



High  
impact



Low  
effort



Optional

## FEATURE RELEASE AT A GLANCE

With this release, Workday delivers Job Description Generation on Job Requisitions, enabling you to quickly create job descriptions using generative artificial intelligence. Workday uses these data points to generate job descriptions.

## WHY CONSIDER THIS RELEASE

Job Description Generation on Job Requisitions enhances recruiting efficiency by quickly generating job descriptions using the Job Title, Company Name and Skills. It saves time by generating a well-written Job Description which can then be optimized by the user to apply the finishing touches.

## YOUR NEXT STEPS

To setup Generative AI for Job Description on Job Descriptions:

- Access the Innovation Services And Data Selection Opt-In task.
- On the Innovation Services Opt In tab, select HCM on the Available Services tab.
- 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
- Enable the domain security of 'Manage: Machine Learning for Job Descriptions' which enables users to access tasks that use machine learning to generate job descriptions.

## EFFECTS ON OTHER AREAS

- HCM

# Manager Insights Hub



High  
impact



Moderate  
effort



Optional

## FEATURE RELEASE AT A GLANCE

With this release, Workday enhances Manager Insights Hub. You can now configure the Hub to tailor content for your organisation, helping managers to take care of their day-to-day tasks. Workday has enabled the hub for additional solutions and functional areas within Core HCM, including Staffing, Core Compensation, and Time Off and Leave where you will see new and updated Sections. This is in addition to the existing functionality within Talent Optimisation and Peakon.

## WHY CONSIDER THIS RELEASE

Consolidates key tasks and reporting, making it a near one-stop shop for managers to focus on what requires their attention in order to more effectively support their team.

## YOUR NEXT STEPS

- To access the Manager Insights Hub, configure the new 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. Access to pages, sections, tasks, and reports depends on your organisation's Workday product subscriptions.
- The individual security permissions of supervisory organisation managers determine what data they can view, and which tasks, reports and cards they can use.
- To customise the Manager Insights Hub, access the Maintain Hubs report.

## OTHER KEY INFORMATION

- Core HCM, including Staffing, Core Compensation, and Time Off and Leave

# Undo Move For Multiple Candidates



Moderate  
impact



No  
effort



Mandatory

## FEATURE RELEASE AT A GLANCE

You can now use Undo Move on multiple candidates at the same time to return them to the previous stage of the job application process.

## WHY CONSIDER THIS RELEASE

This is automatically available and reduces the effort needed to move candidates back in the Job Application Business Process to the previous stage as it can now be achieved in bulk.

# New Report Field - Leaves For A Day



Low  
impact



No  
effort



Optional

## FEATURE RELEASE AT A GLANCE

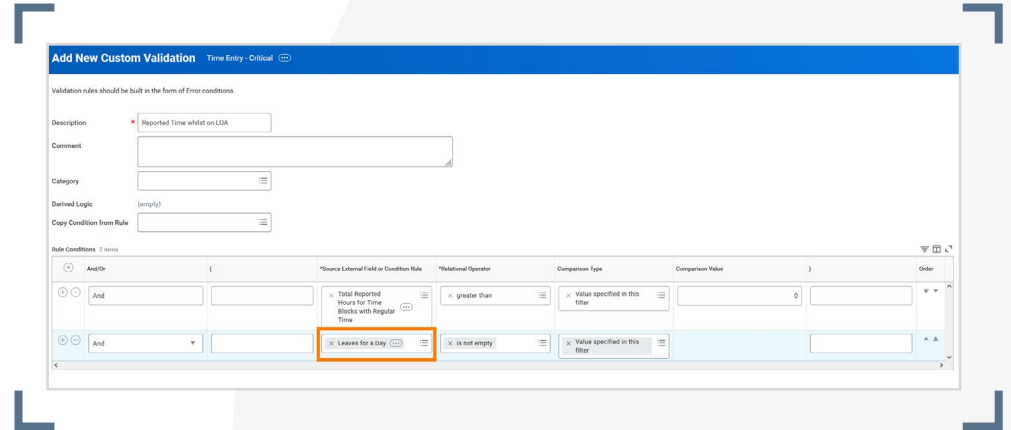
Workday provide a new field on the Time Day business object "Leaves for a Day", this can be used in validations.

## WHY CONSIDER THIS RELEASE

No longer required to build a calculated field to lookup this information when creating validations, reducing complexity.

## YOUR NEXT STEPS

- No need to update existing validations. Simply configure new validations using the new field.



# Automatically Submit Time



Moderate  
impact



Moderate  
effort



Optional

## FEATURE RELEASE AT A GLANCE

Workday has released a new task to schedule submitting time "Auto Submit Time". This is controlled by a new domain security policy which must be configured.

## WHY CONSIDER THIS RELEASE

The new Auto Submit Time task provides additional options and scheduling functionality over the existing mass submit time task. Preos recommends switching over to this new task and moving away from Mass Submit Time.

## YOUR NEXT STEPS

- Configure the new domain security policy in the time tracking functional area "Process: Auto Submit Time"

Security Groups	View	Modify
Implements Time Tracking Administrator	Yes	Yes

# Midweek Time Calculation Eligibility Support



Critical impact



High effort



Optional

## FEATURE RELEASE AT A GLANCE

Workday now supports midweek eligibility changes in time calculations for a worker, previously time calculation eligibility was only evaluated at the end of the week.

## WHY CONSIDER THIS RELEASE

This closes a gap which often had manual workarounds to ensure workers received the correct pay and premiums when they had a job change which caused time eligibility changes mid week.

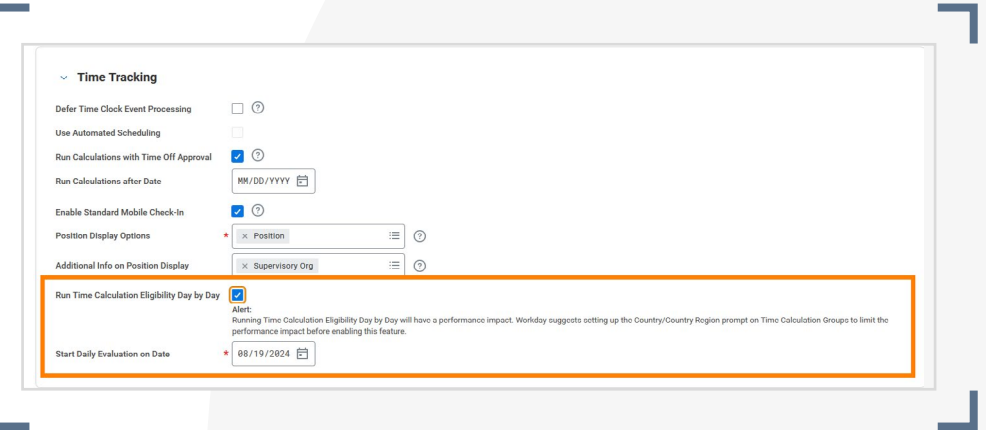
## YOUR NEXT STEPS

- Access the Edit Tenant Setup - HCM task, find the Time Tracking section, and enable the Run Time Calculation Eligibility Day by Day check box. Provide a date after which to start running calculations daily.
- Thoroughly test calculations and changes using Time Calculation Debugger to confirm workday gives the expected results.

Note: It is recommended to complete the country/country region field on time calculation group to assist workday performance.

## OTHER KEY INFORMATION

View time calculation eligibility changes for workers with the new Time Calculation Eligibility Changes report





# Enter Time By Period (Period View)



High impact



High effort



Optional

## FEATURE RELEASE AT A GLANCE

Period time entry calendar can now be enabled as the default view and it now supports adding time off directly from the period view. Scheduling information can also be included directly on the new period view.

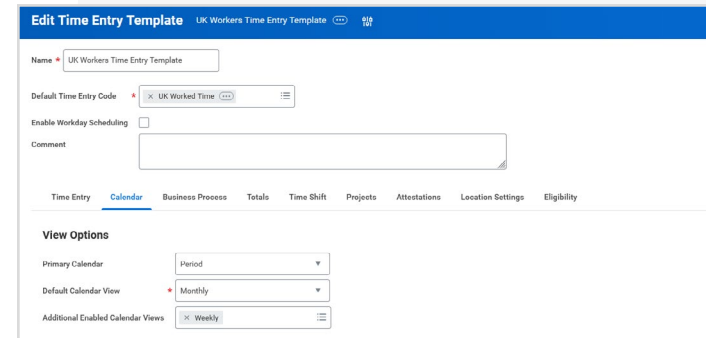
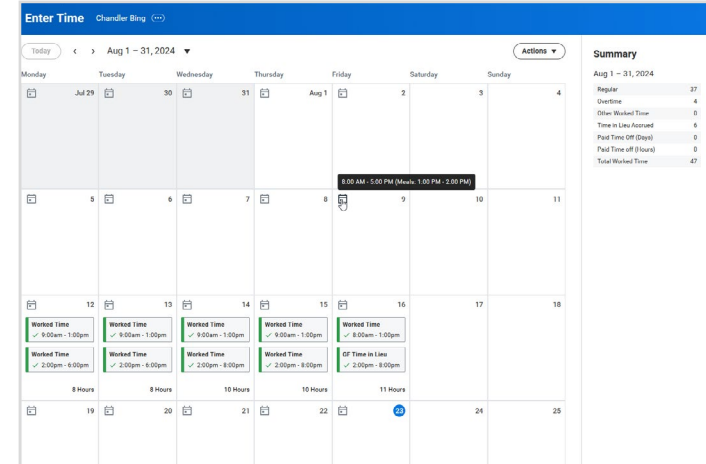
Workday renames the Classic with Period option to Classic.

## WHY CONSIDER THIS RELEASE

Enables a better user experience and supports the expected period (monthly) display that is typical in certain countries.

## YOUR NEXT STEPS

- Edit the time entry template and set the primary calendar and default calendar view.



# The Value Of Strategic Workday Release – A Case Study

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## **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.

# Feature Release FAQs

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## 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 test 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](mailto: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.**

**If you have any questions about Workday 2024 R2 or Release Management, our team of experienced Workday consultants is here to help. Get in touch.**



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