The Preos guide to Workday 2026 R2.

Where to focus your release effort for maximum impact.

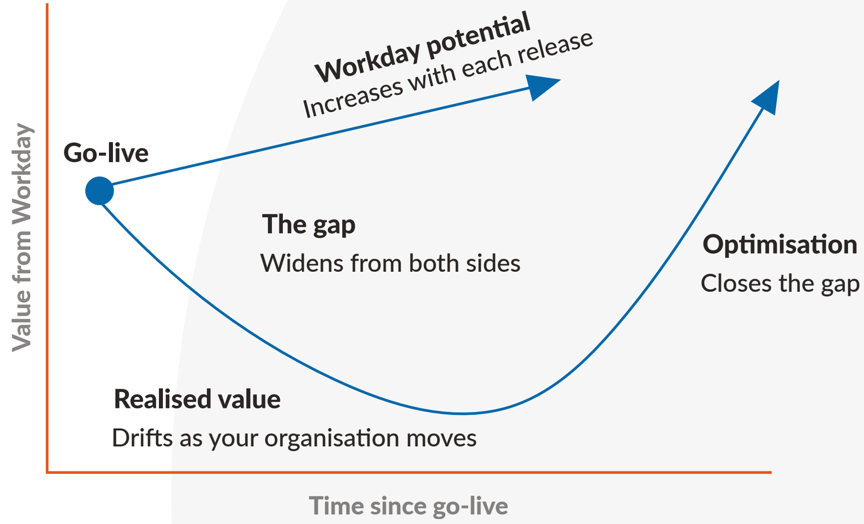
Contents.

About this guide.

Workday never stands still. Every biannual release brings new functionality, and with it, an opportunity to do more with your platform. However, left unmanaged, releases pass by, capabilities you already pay for sit unused, and the value of your investment erodes.

The releases are where much of that value is won. Handled well, each one is a chance to keep Workday working harder for your organisation. That takes a considered approach: evaluating features against your roadmap, testing thoroughly, and bringing people with you where change management matters.

Ensuring Workday customers get value from their investment is where Preos started, and twice a year this guide gives you our consultants' view on the features most likely to be worth your attention. For each one, you'll find what it changes, why it matters, and the value it could bring.



Workday's potential rises with every release, while your organisation keeps changing around it. Without attention, the two drift apart, capabilities go unused, and even the best system stops delivering.

The ratings

We rate each included feature on a consistent scale so you can see at a glance where it's worth spending your energy. That covers the impact a feature is expected to have and the effort to implement it, so you can separate the quick wins from the bigger commitments and decide what earns a place on your roadmap now and what can wait. We also flag whether an update is optional or something Workday will apply for you, so nothing mandatory takes you by surprise.

A note from our Head of Workday Enhancement Services.

In over 20 years working with global HR systems and dozens of Workday releases, I've learned that the hard part was never understanding what's new. Workday tells you that. The hard part is knowing what to do about it.

Every cycle, I hear the same things from teams. We're three releases behind and don't know where to start. Which of these hundred-plus updates really matter for us? We don't need another quick fix; we need a plan. These aren't signs of a team doing badly. They're what happens when releases arrive faster than there's capacity to absorb them.

We often say the value isn't always in the big headline features. It's in the smaller updates, the ones that make a particular process smoother or take friction out of someone's day. But you can only spot those if you know what your people need from Workday in the first place. Without that, the small wins are easy to miss entirely. The organisations that stay ahead tend to do three things well:

- **Start with strategy.** They line updates up against their business goals first, then prioritise for impact, rather than working through the release notes top to bottom.
- **Treat releases like projects.** They bring the right people in early, communicate what's changing, and test properly before anything reaches their people.
- **Invest in their teams.** They use each release to build internal knowledge, so every cycle leaves them a little more capable than the last.

None of that is complicated. But doing it well, every six months, on top of everything else your team already carries, can be a challenge. It's why Workday Enhancement Services exists. Our clients don't wait for this guide. Months before it's published, their consultant has already walked them through the release against their own roadmap and their own tenant, so the plan is ready before the release lands. This guide gives you our general view on what's worth your attention. Turning that into a plan for your goals and your tenant is where we can help.

Verity Gooch
Head of Workday Enhancement Services at Preos

Learn More

How to run a good release process.

Maximising each release is more manageable when you have a process you can repeat with each cycle. That could look like:

1 Getting across what's coming.

Ahead of each release, Workday publishes its release notes and the What's New report. You don't need to read everything in detail, just enough to understand what's changing and, importantly, which updates Workday applies automatically versus the ones you choose to adopt.

2 Prioritising against your roadmap.

Weigh each feature against your own goals, then by impact and effort, so your energy goes to the changes that matter most to your organisation. This is exactly what our ratings are designed to help with.

3 Deciding who owns what.

Releases run smoothly when ownership is clear. Bring in the right people early from across HR, IT, payroll, and finance, and assign someone to each area to review and test the features that affect them.

4 Testing in your preview tenant.

Workday gives you a five-week preview window before go-live. Use it to configure and test the features you're adopting, check the automatic changes behave as expected, and run regression tests so nothing that already works quietly breaks. Reports and integrations are worth testing as a priority.

5 Managing the change.

Where a release changes something people will notice, tell them before it lands, and put training in place where it's needed.

6 Going live, then looking back.

Once the release is in production, keep an eye on how the new features are being used and what's landed well. That review is what makes the next cycle easier.

Release Features 2026 R2

HCM.

Worker Profile User Experience.

Moderate impact

No effort required

Optional

Workday has redesigned the employee profile with an updated layout and navigation. It adds a profile header with contact and location details, as well as a collapsible side menu. A Private tab holds personal information such as pay, rewards and absences, and a Public tab shows how your profile appears to others.

The change helps workers understand and manage their own information and gives them more control over what they show to other workers where applicable. It is a worker-facing update, so it is worth planning how you introduce it rather than letting people meet it unannounced.

Before you enable it, review your training materials and job aids so they reflect the new profile.

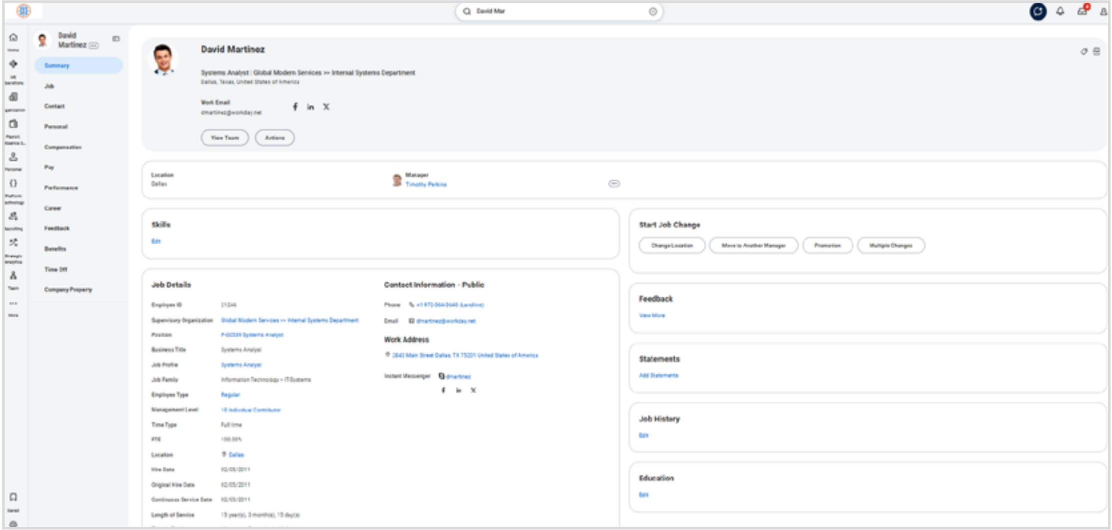
Your next steps

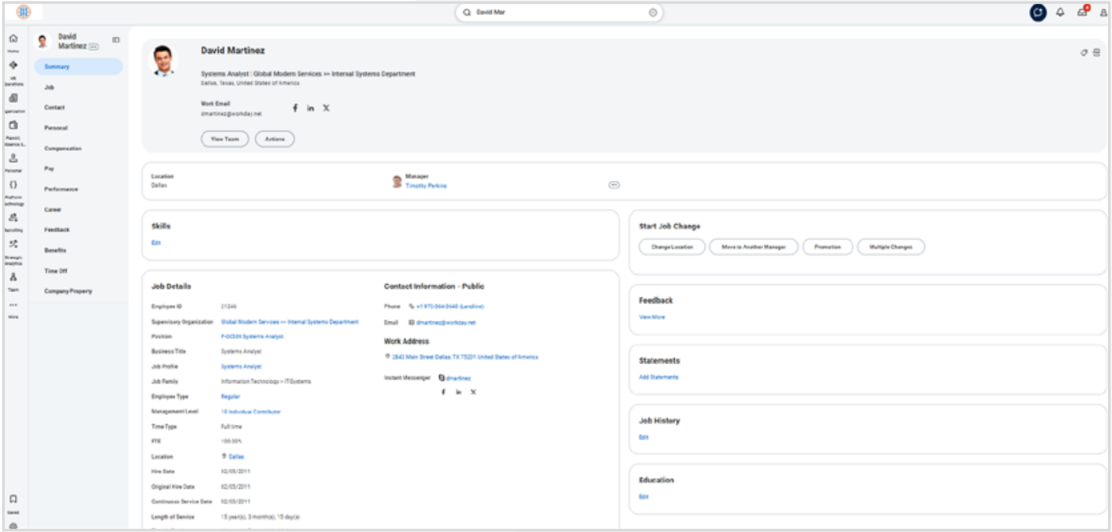
- The update is optional. The opt-out stays available for roughly 18 months.
- To take it at your own pace, use the opt-out to hold the current experience while you test the redesign and plan the rollout.
- Both controls sit under Maintain Feature Opt-Ins:
  - Opt out of the full Worker Profile Modernization feature to keep the current experience.
  - Opt out of the Private Tab element only, which keeps the new header, navigation and Public tab, and turns off just the Private tab.

Learn More

Function: HCM

Worker Profile User Experience.





Function: HCM

Configurable Workday Home Page.

Low impact

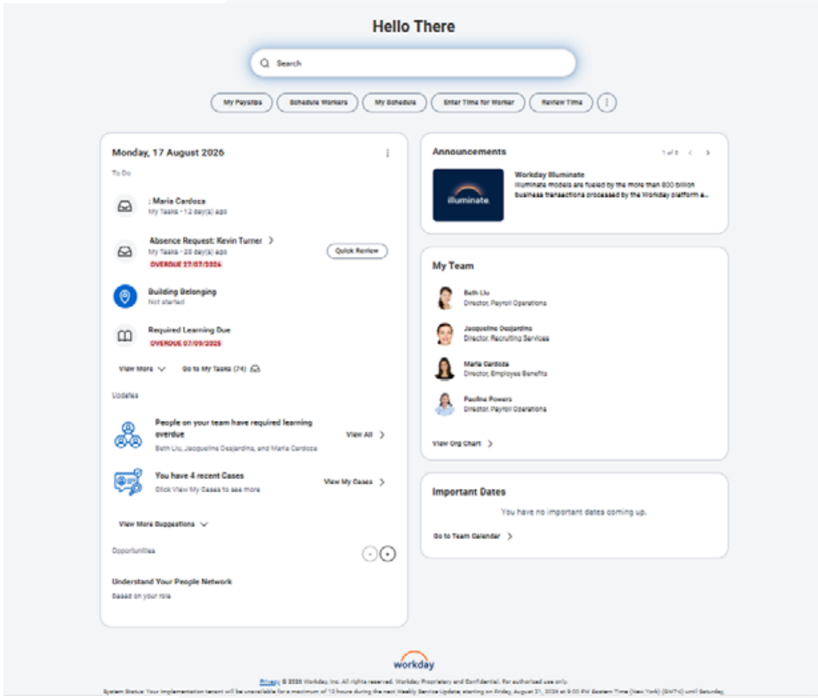
No effort

Mandatory

Workday has redesigned the Home page with a more flexible layout, using two columns on desktop and one on mobile. A new Daily Brief widget brings key tasks, updates, and recommendations together in one place, and administrators can control widget visibility and priority, as well as add configurable cards.

This makes it easier for users to find important tasks and information and gives administrators more flexibility to personalise the Home page across desktop and mobile devices.

The new layout is automatically available. Any further customisation requires setup effort from administrators, and it is worth reviewing your training materials and guides to ensure they reflect the redesigned Home page.



Your next steps

- To manage which widgets appear, their display order and who can see them, use the Home Page Configuration task.
- To add a custom card, create or publish it through Manage Configurable Cards, then enable it in Home Page Configuration and position it where you want it displayed.

Learn More

Function: HCM

Change Personal Information New User Experience.

Moderate impact

Moderate effort

Optional*

Workday has redesigned the standalone and onboarding personal information experience into a more user-friendly, guided process, with logical field grouping, built-in consent preferences, and Quick Tips in place of field-level help text.

A final review step lets users check their changes before submission, which improves accuracy and overall data quality. The result is a more intuitive and consistent experience, aligned with recent platform updates such as Hire and Change Job.

Your next steps

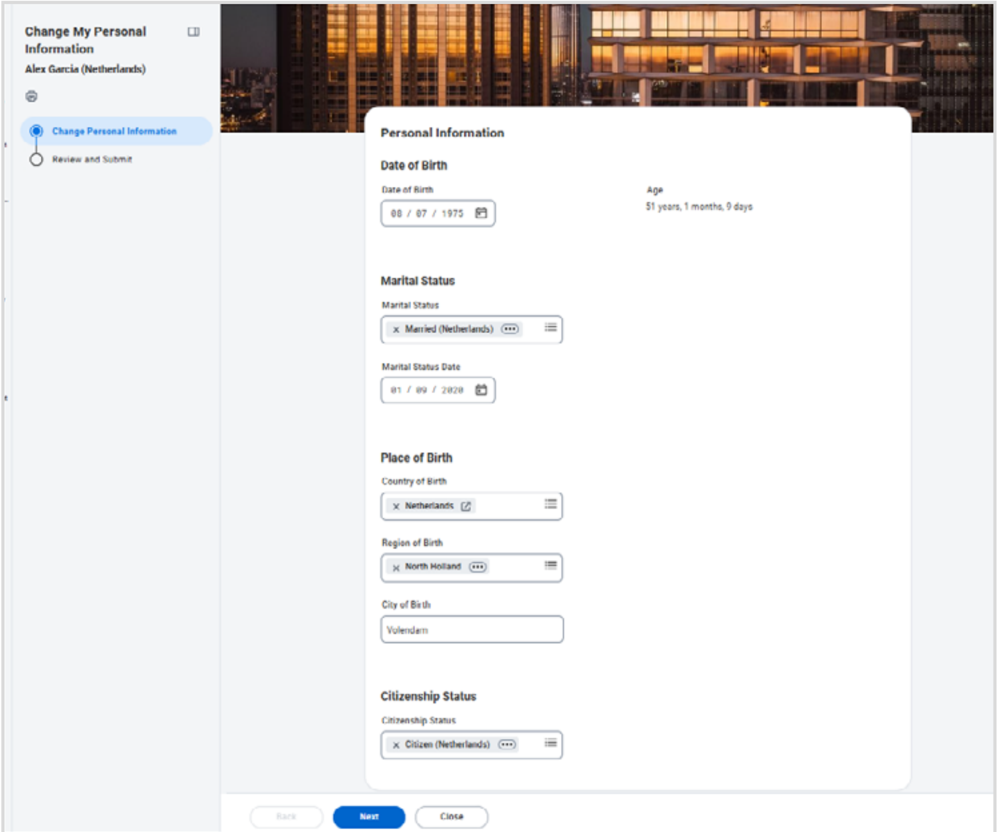
- Use the Maintain Feature Opt-Ins task and opt into the Change Personal Information - New User Experience feature.
- Update the Onboarding business process so Change Personal Information is configured as a standalone task.
- Optionally, configure Quick Tips to replace existing field-level help text.
- Review your onboarding and help text configurations so the new experience is applied correctly.
- If you choose not to opt in, the existing Change Personal Information experience stays unchanged.

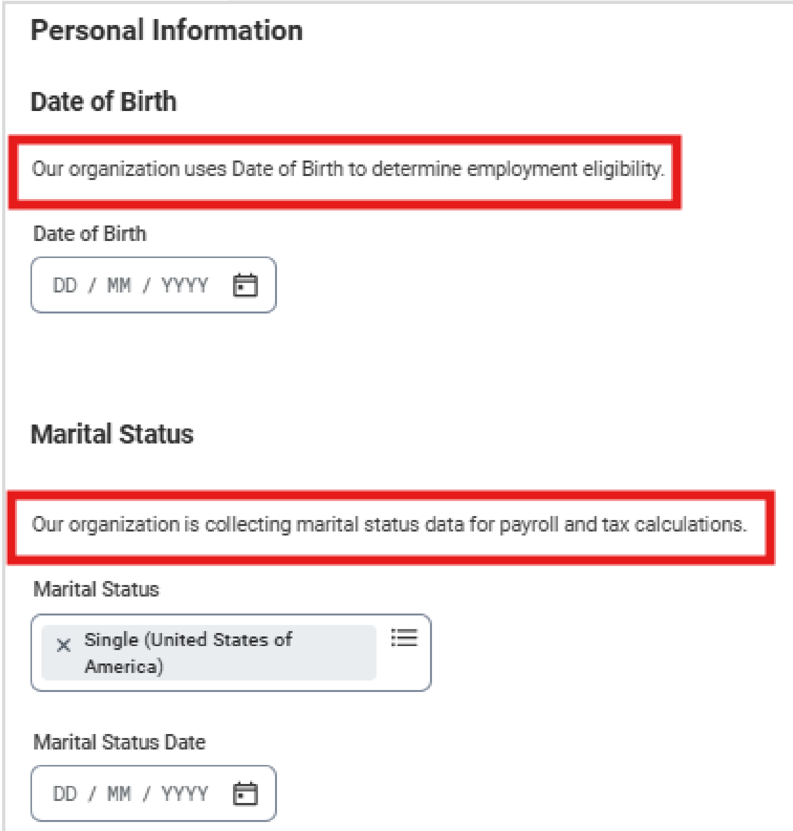
Learn More

*Optional but likely to be mandatory in a further release

Function: HCM

Change Personal Information New User Experience.





Change Job New User Experience Initiation Improvements.

High impact

High effort

Mandatory

Change Job Templates, along with the enhanced user interface, become mandatory for all tenants in 2026 R2.

When Change Job is initiated in the tenant, the process uses Change Job Templates to consolidate the overall process. The templates experience with the enhanced UI reduces the time spent completing Change Job transactions by making only fields related to the transaction visible and providing a consolidated, organisation-specific process.

Templates are configurable to meet organisational needs, automatically stay up to date with the latest enhancements, and simplify template creation and navigation for faster processes.

Your next steps

This update is mandatory and changes the Change Job user experience, so make sure users are aware of the new interface and any associated process changes.

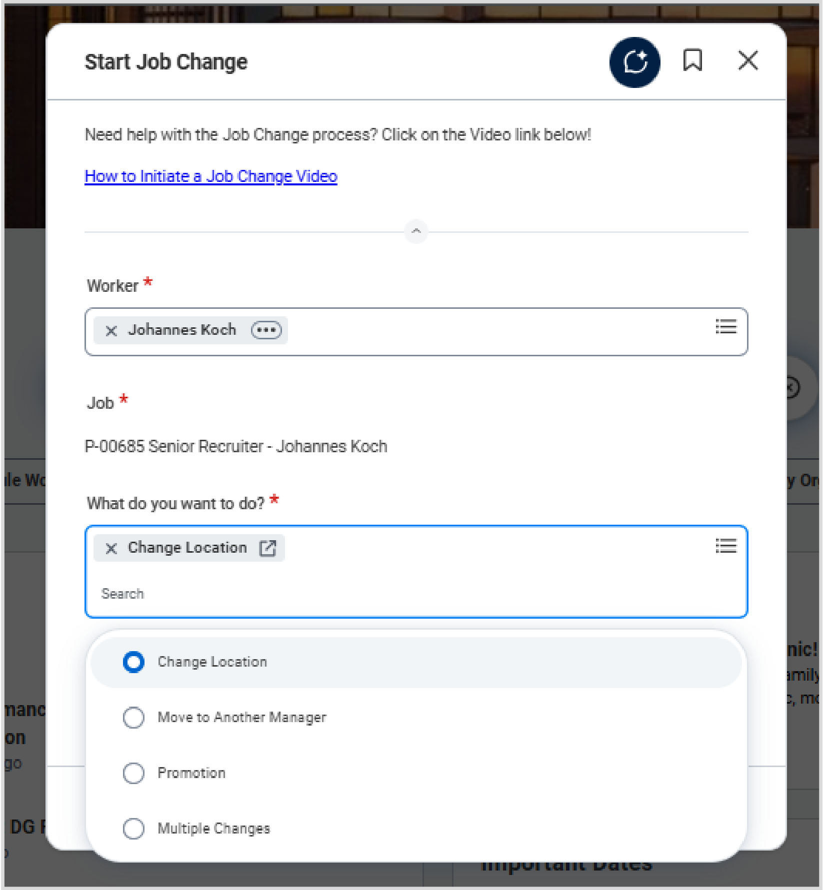
- Review your Change Job Templates using the Maintain Change Job Templates task against the latest Workday Community guidance, so they are configured correctly and deliver the intended experience.
- Where Change Job Templates are not yet configured, Workday automatically creates them from your existing business process configuration and migrates them to support the new experience. Existing templates should still be reviewed.

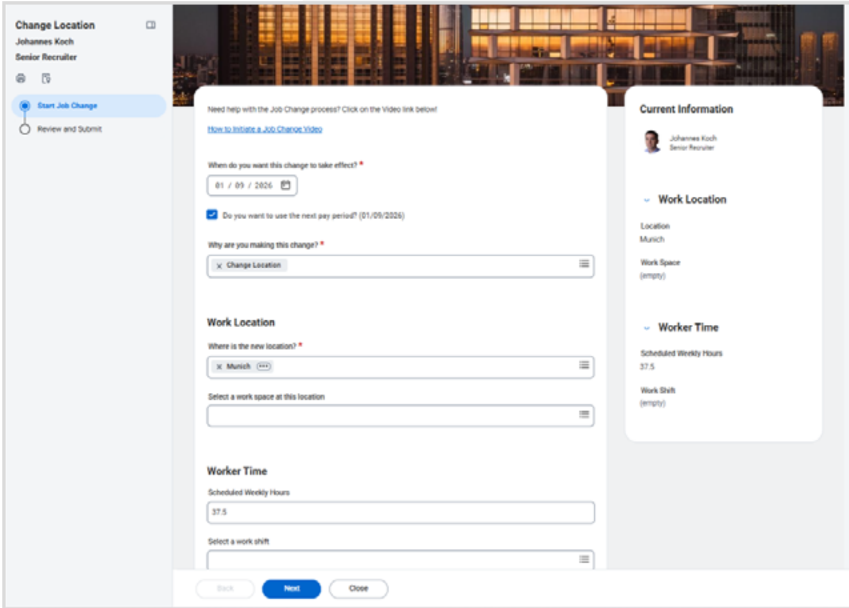
Good to know

If you use the Recruiting SKU, review how the new Change Job template framework supports internal candidates hired through Recruiting. Internal move scenarios may need extra template configuration, including dedicated templates, so review these scenarios and validate the configuration during testing to ensure the expected user experience.

Learn More

Change Job New User Experience Initiation Improvements.





Enhanced Change Job Experience Conversion.

High impact

High effort

Mandatory

Going forward, Change Job transactions will use Change Job templates. Workday automatically converts your existing templates, creates any missing ones, and updates security configurations as needed to support the new experience.

When a user initiates a Change Job transaction, they are presented with a Change Job Template using the new enhanced experience. If your tenant does not already have templates for certain staffing transactions, Workday creates them, including Change Job, Request Transfer (if Workday Recruiting is in scope), Change Location (if currently configured), and Change Contingent Worker (if currently configured).

Security for Change Job now sits within Configure Optional Fields, which overrides the domain permissions.

Your next steps

The specific updates applied to your tenant will depend on your current Change Job template and security configuration.

- **This change is applied automatically to your Preview and Production tenants, so review, prepare and test the impact before it reaches Production.**
- Validate your Change Job workflows in Preview, review the converted templates and security settings, and identify any required updates ahead of the Production deployment.
- Pay particular attention to the new setup within Configure Optional Fields for Change Job, and regression test it.

Learn More

Correct Change Job – Editable Fields Configuration.

Moderate impact

No effort

Optional

This feature gives you the ability to control who can edit three key correctable fields within the Correct Change Job task; Supervisory Organization, Position and Headcount Option. Access to these fields can be controlled in the “Maintain Functionality for Staffing Transactions" task.

It gives you more flexibility and control over field edits when correcting a Change Job event, helping ensure updates are made by the appropriate users.

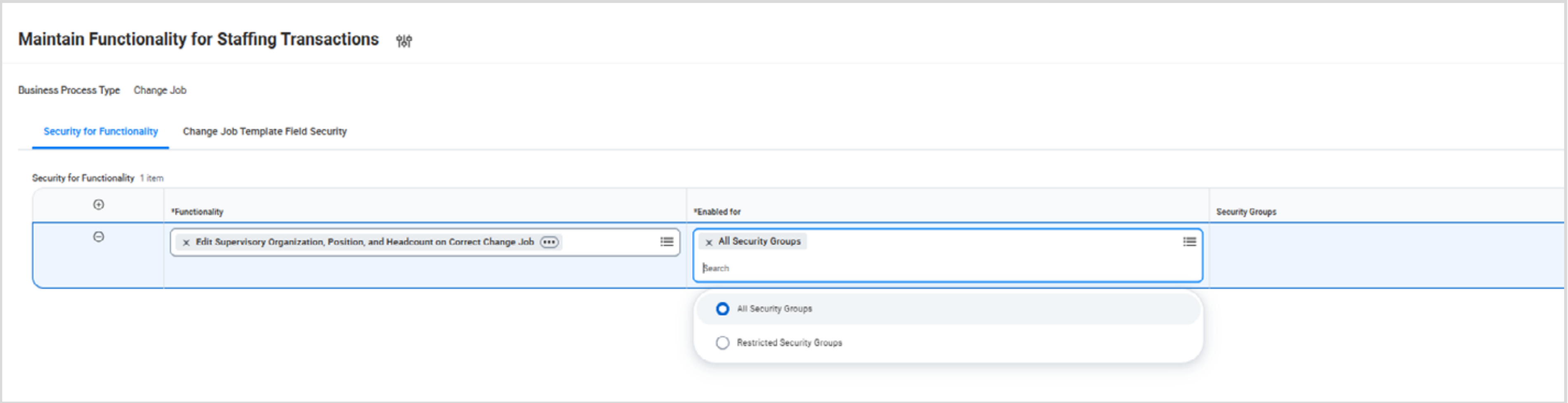
Your next steps

This is delivered automatically in 2026 R2, respecting your current setup and the way you have configured the fields in Configure Optional Fields. It is still worth checking the configuration:

- Review the new Edit Supervisory Organization, Position, and Headcount on Correct Change Job functionality on the Change Job business process type, in the Maintain Functionality for Staffing Transactions task.
- Update the configuration as needed.
- This feature may need additional testing and updates to your training materials.

Learn More

Correct Change Job – Editable Fields Configuration.



Override Change Job Field Access Using Security Groups.

High impact

High effort

Mandatory

You can configure security groups for specific Change Job template fields, which gives you greater control over who can view and edit those fields within Change Job templates.

Your next steps

- This is automatically available. To use it, review and update the Change Job Template Field Security configuration in the Maintain Functionality for Staffing Transactions task, making sure it aligns with your existing Staffing Actions: Select or Create Position domain security settings.

Good to know

This configuration overrides the configuration on the Configure Optional Fields task, unless the field is set to Hide for All or Not Enterable for All. It does not apply to all fields. Because security then sits in more than one place, test this thoroughly so the process runs as you expect.

Learn More

Mass Job Change.

Moderate impact

Moderate effort

Optional*

Workday is introducing Mass Job Change, a high-volume, table-based experience for large-scale staffing updates in bulk, with tabs for Change Job, Organization Assignments and Compensation Change.

It supports up to 5,000 job changes in a single mass action, which reduces execution time and administrative effort compared with manual one-to-one updates or offline EIB uploads.

Workday and custom validation rules run in real time to capture errors, warnings and missing data on the table before you submit. You can track transaction statuses in the table and see added, modified and removed values at cell level. It supports out-of-sequence transactions and lets you add mass comments and complete mass approval workflows (Review, Approve, Deny, Send Back or Rescind) at scale.

The result is faster processing, improved data accuracy, stronger governance and approvals, and greater flexibility for HR teams in managing workforce changes.

Your next steps

- You must opt into the feature via Maintain Feature Opt-Ins. The opt-in is available for 6 months.
- Configure security to give the appropriate users access to start, review, approve and manage Mass Job Change events. Update the Change Job and Mass Action Event business process security policies to allow users to initiate and complete mass job changes and access the related reports and tables.

Alternatively, you can continue using the existing Mass Actions Worksheets. If you do, start planning the transition to Mass Job Change now, since it replaces them by default in 2027 R1.

Learn More

Effective Dating for Service Dates.

No impact

No effort

Optional

You can now optionally add effective dates to service date changes. Effective dates can be applied when creating new service date changes through the Edit Service Dates task, and when correcting existing Service Dates Change business process events. Effective Dating of Service Dates is no longer mandatory as originally planned. If you have already opted in, you continue to use the feature and cannot opt out. If you have not yet enabled it, you can opt in at any time to take advantage of the new functionality.

Your next steps

- To enable this feature in Production, select the Use Effective Dating for Service Dates option on the Edit Tenant Setup - HCM task. **Once enabled, this setting cannot be reversed.**
- Before enabling it, review and test the functionality, assess any potential impact on Absence calculations using the Tenant Analyzer report, and complete any configuration updates and testing to confirm the expected results.

Test the impact on Absence calculations, and on any downstream systems where these dates are used.

Learn More

Generate Document Step on Request Business Process.

Low impact

Low effort

Optional

You can now incorporate a Generate Document step directly into the Request business process.

Documents can be generated automatically during request workflows, reducing manual effort and administrative overhead, improving turnaround times and operational efficiency, and helping maintain compliance with document retention and record-management standards.

It also ensures required documentation is produced at the appropriate stage of the process. This expands the use of the Request business process, letting you support a broader range of requirements that were previously constrained by the inability to generate letters directly within the workflow.

Your next steps

To enable this feature, add a Generate Document action step to the Request business process, select the document template to generate, and configure the appropriate security permissions.

Good to know

No web service or REST API changes are included in this release, and no impact on other areas.

Learn More

Route Alert Notifications to Terminated Worker Home Email.

Low impact

Low effort

Optional

Alert notifications can now be routed to a terminated or offboarded worker's personal (home) email address instead of their work email address.

This means former pre-hires and terminated employees can receive critical notifications through the automatic redirection of communications to their personal email, which helps ensure important information reaches them at the appropriate time, particularly when notifications or updates only become available after termination.

It addresses a common challenge of maintaining timely, reliable communication with former workers, reducing the risk of missed information and supporting compliance with offboarding processes.

Good to know

Setup is required. The alert needs to be created or amended to update the notification behaviour. If you intend to use this feature, make sure the personal email address is updated as part of the termination process.

Learn More

Object Transporter for Security Groups and Related Business Process Security Policies.

Low impact

Low effort

Optional

You can now migrate a security group and its business process security policy permissions from a source tenant to a target tenant using Object Transporter.

It adds the security group to applicable event security policy permissions in the target tenant, without removing or overwriting existing security group assignments or other business process security policy configurations.

This saves time and reduces manual errors when moving security groups between tenants, lets you validate permissions more efficiently, and supports internal audit processes that require the separate review and activation of policy changes. **Security administrators must still manually remove groups and their permissions in the target tenant.**

Your next steps

This is automatically available and can be used during migration. Test a small change across two environments first, so you understand exactly what is being added and amended.

Good to know

This impacts all areas of Workday, since security is configured tenant-wide.

Learn More

Assign Roles to Worker Initiating Action being Replaced.

Low impact

Moderate effort

Mandatory

Workday is retiring the Assign Roles to Worker initiating action and replacing it with a new initiating action, Assign Roles - Change Assignments for Worker.

This improves and eliminates existing issues with Assign Roles to Worker, such as inaccurate or missing updates and Time Zone updates for different roles.

Your next steps

- Update your business process definitions to use the Assign Roles - Change Assignments for Worker initiating action, and stop using the Assign Roles to Worker initiating action.
- Configure the allowed security groups for the Assign Roles - Change Assignments for Worker initiating action within the Assign Roles business process policy.
- Remove all security groups from the Assign Roles to Worker initiating action.

Good to know

This is only a wording change, but you should review the business processes that use this one as a sub-process, so they continue to make sense and work as needed.

Learn More

Feature Opt-In Removed for Restrict Job Profile Visibility by Country and Organization on Job Requisition Tasks.

Low impact

No effort

Mandatory

Workday now lets you control which job profiles are available during job requisition processes, based on supervisory organisation, company, country, or a combination of these criteria.

Workday removes the Restrict Job Profile Visibility by Country and Organization feature on the Maintain Feature Opt-Ins task. This means that Workday now always applies the restrictions you configure on the Restrict to Country and Restrict to Organization fields on the Manage Job Profile business process.

Users are only presented with job profiles that meet the configured requirements for the transaction. This improves the recruiting experience by ensuring users only see job profiles relevant to the country, company, or organisation associated with the requisition, thereby reducing selection errors, improving data quality, supporting global job catalogue management, and helping maintain consistency across recruitment processes.

Your next steps

This is automatically available. If you already have countries or organizations configured in the Restrict to Country or Restrict to Organization fields on the Manage Job Profile business process, test the feature to make sure it still meets your needs.

Learn More

Retiring Worklets.

Moderate impact

Moderate effort

Mandatory

Workday is retiring several Worklets in this release, including Anniversaries, Birthdays, Headcount, and Hiring: My Open Positions. If you are still using these Worklets, they will be removed.

These are being replaced with the:

- Headcount reports.
- Manager Insights Hub.
- My Team Anniversaries report.
- My Team Birthdays report.

Your next steps

- To keep surfacing this information to your employees and managers, review your Hubs.
- Enable the Manager Insights Hub and replace any references to the legacy Worklets.
- Configurable anniversary and birthday alerts can be created and maintained using Workday reports.

Learn More

ABSENCE.

Daily Quantity Defaults and Validations for Position Based Work Schedules.

High impact

High effort

Optional

Workday can now validate or default values in time off based on a worker's position-based work schedule, or on position-based schedules from Workday Scheduling.

This enhances support for multiple positions across the Workforce Management Suite and allows time off validations to be evaluated per position, e.g. maximum hours per day.

Your next steps

Workday delivers new fields and updates existing fields to support these changes. If you want to use this feature, you can replace the existing fields with the new fields where required.

New fields:

- Position Scheduled Shifts: Shift Duration in Milliseconds for As of Date
- Position Work Schedule Calendar: As of Date Is a Workday
- Position Work Schedule Calendar: Workday Duration in Milliseconds for As of Date
- Position Work Schedule Calendar: 1 if Date is Workday, Else 0
- Position Work Schedule Calendar: Workday Hours for As of Date (No Rounding)
- Position Scheduled Shifts: Shift Hours for As of Date (No Rounding)

Updated fields:

- Worker Scheduled Shift(s): Shift Milliseconds for As of Date
- Worker Work Schedule Calendar: Date is a workday (based on As of Date)
- Worker Work Schedule Calendar: Workday milliseconds for date (based on As of Date)

Learn More

Revise Time Off Experience.

Low impact

Low effort

Mandatory

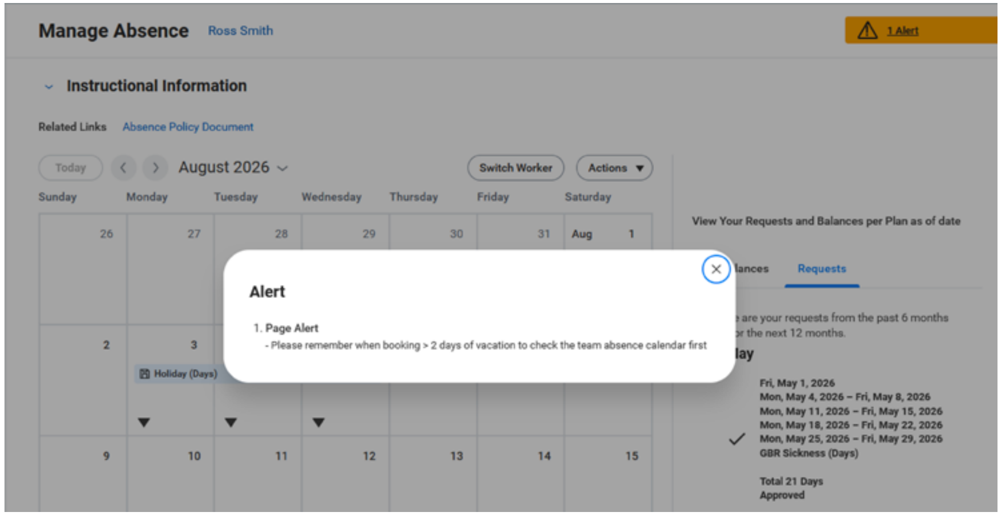
Workers can now revise Absence directly from the Absence calendar using a new edit button, and this is supported on mobile. Previously, when a time off or leave request needed revision, the task was sent to My Tasks (Inbox) to adjust it from there. Workday continues to send the task to My Tasks (Inbox), and the interface there has been updated with a more intuitive design.

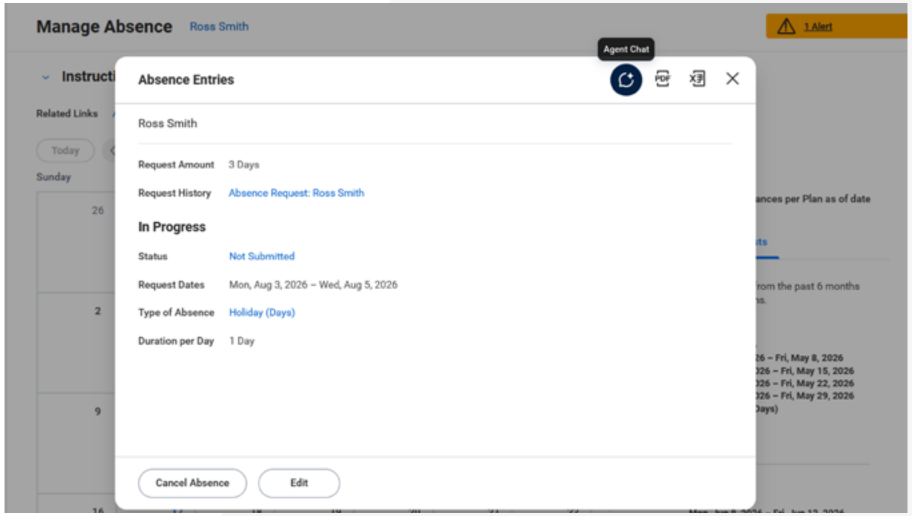
Your next steps

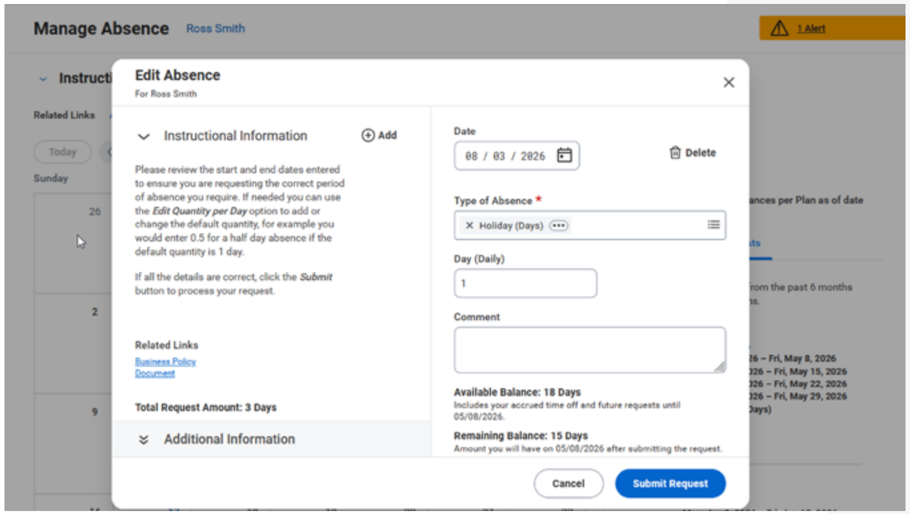
This is automatically available. It may affect your training materials and user guides, so review them so they reflect the revised experience.

Learn More

Revise Time Off Experience.







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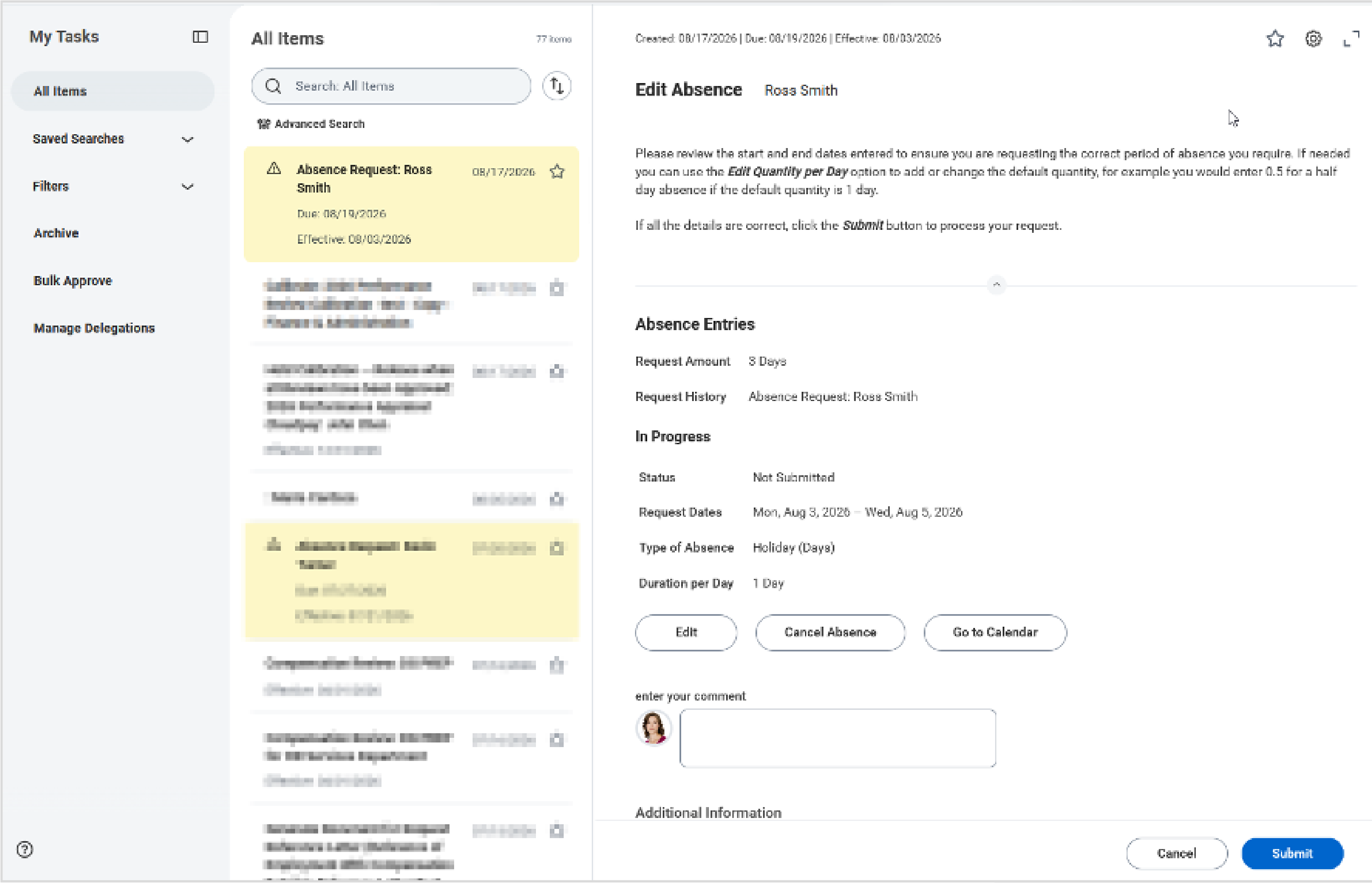


Leave of Absence on Mobile.

Low impact

Low effort

Mandatory

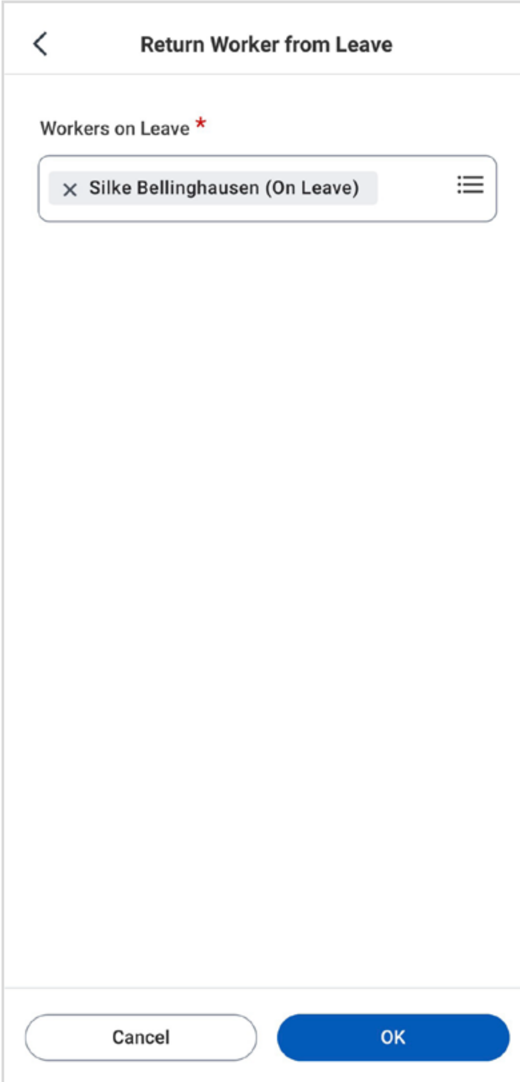
Workday now supports Request Return from Leave of Absence and Return Worker from Leave on mobile. Previously, returning a worker meant using the desktop or Workday in a browser. This is now supported directly within the Workday app.

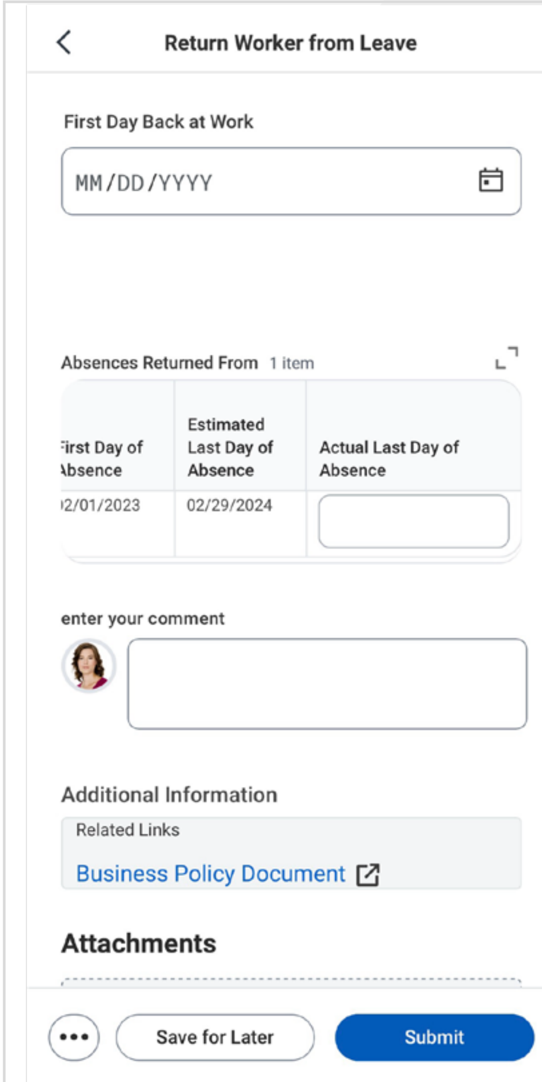
Good to know

This feature is automatically available. You may want to review any training materials and user guides that reference return from leave of absence, including any workarounds you currently have in place.

Learn More

Leave of Absence on Mobile.





Populate Position from Schedule on Time Offs.

Moderate impact

High effort

Optional

When workers have multiple positions, positions can now default into the time off or leave of absence request. This enhances support for multiple positions across the Workforce Management suite and will allow time off to apply for all positions (if applicable) which enhances end user experience.

Your next steps

Edit the Absence Table or Edit Time Off, then select either:

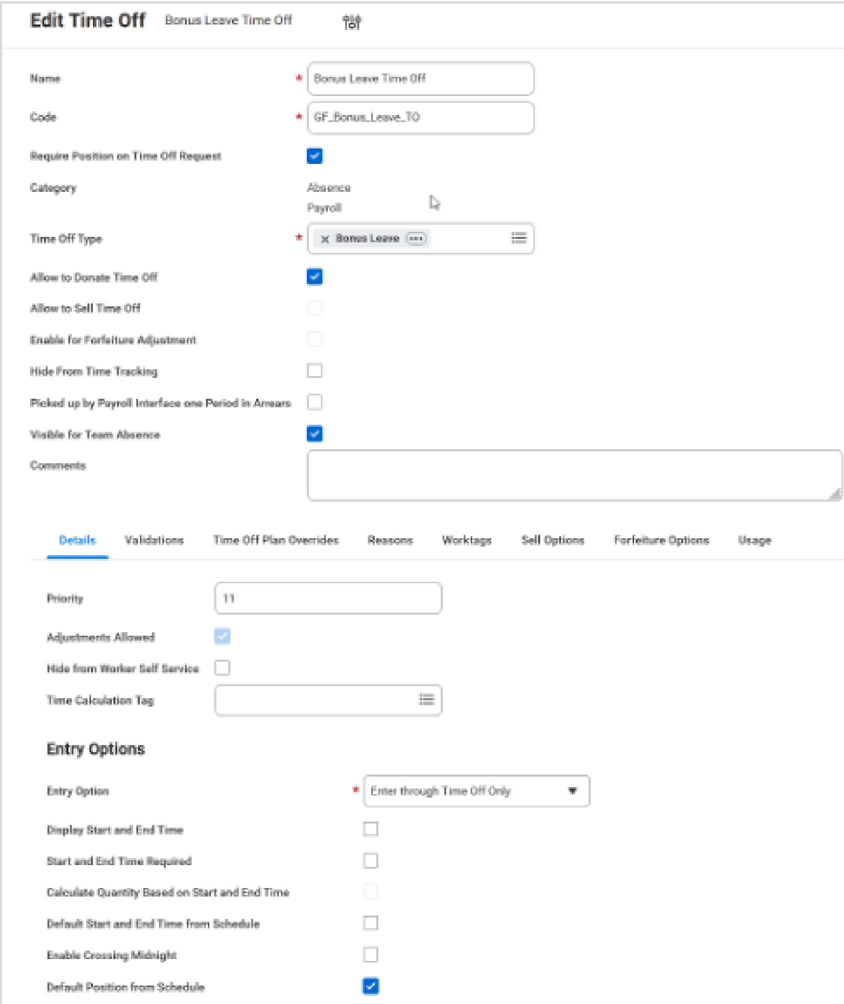
- The Require Position on Time Off Request check box, or
- A time off plan that is position-based, then select the Default Position from Schedule check box.

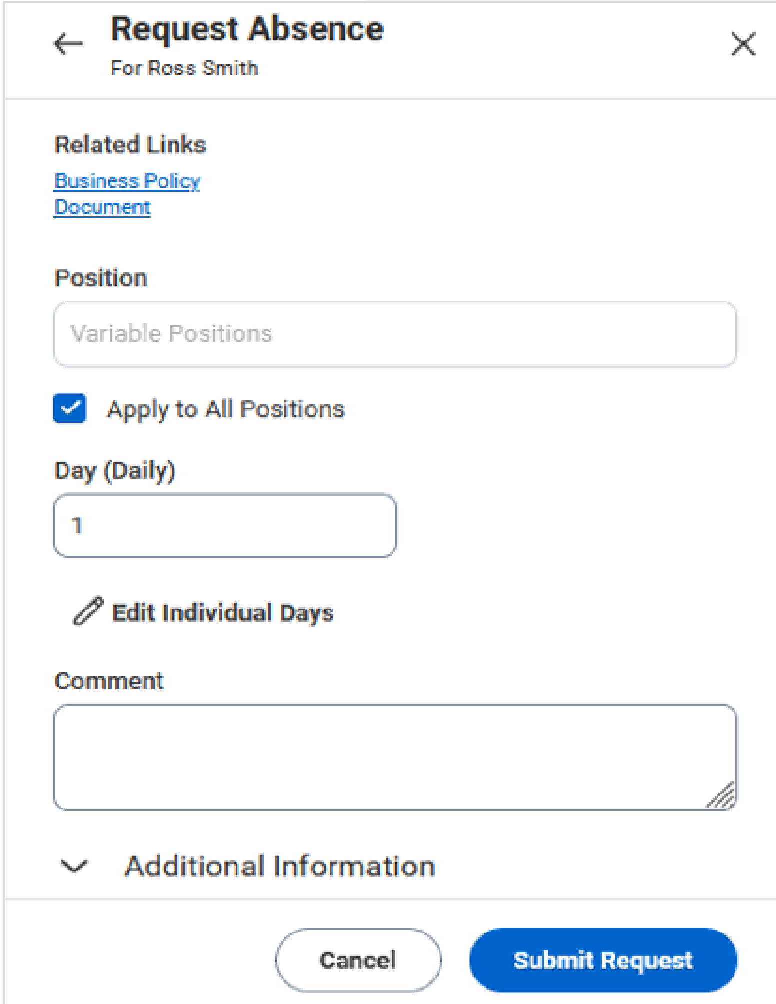
Good to know

This may affect payroll, time tracking and integrations depending on your setup; we recommend full testing of this functionality prior to deployment in Production.

Learn More

Populate Position from Schedule on Time Offs.





Donate Time Off.

High impact

High effort

Optional

Workday now supports donating time off to coworkers through three capabilities: Donate Time Off, the ability to donate to a coworker; Request Time Off Donation, the ability to request that time off be donated by coworkers; and Request Time Off Donation for Worker, the ability for HR or managers to request the donation on behalf of a worker. In some markets, donating time off to coworkers is common practice to cover extended sick leave. Workday did not previously support this, so many companies managed it offline.

Your next steps

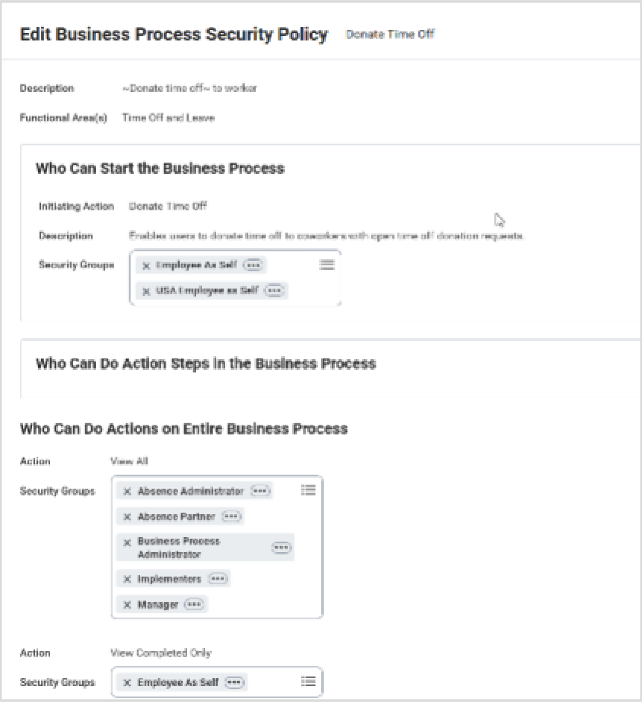
- Configure both the Request Time Off Donation and Donate Time Off business processes and policies.
- Enable a time off which is eligible for donation by selecting the checkbox on the time off when creating or editing a time off.
- Create an accrual which can receive donated time off, and attach it to the same time off plan that time off can be donated from.
- Add the Donated Time Off Received and Time Off Donated reports to the worker profile.

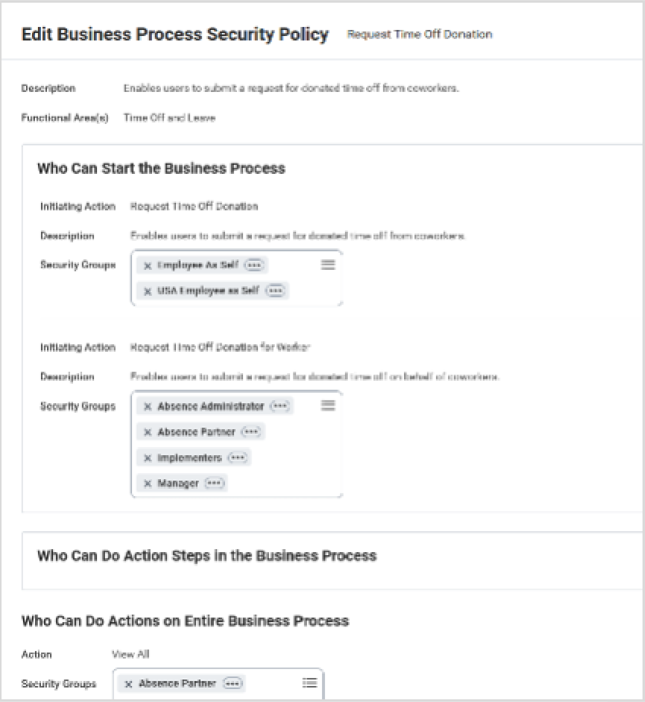
Good to know

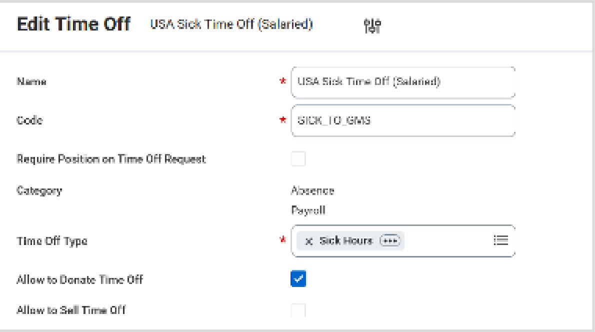
This may impact payroll and integrations depending upon your setup.

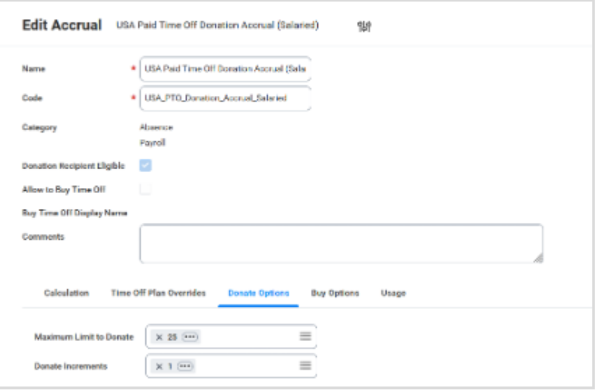
Learn More

Donate Time Off.

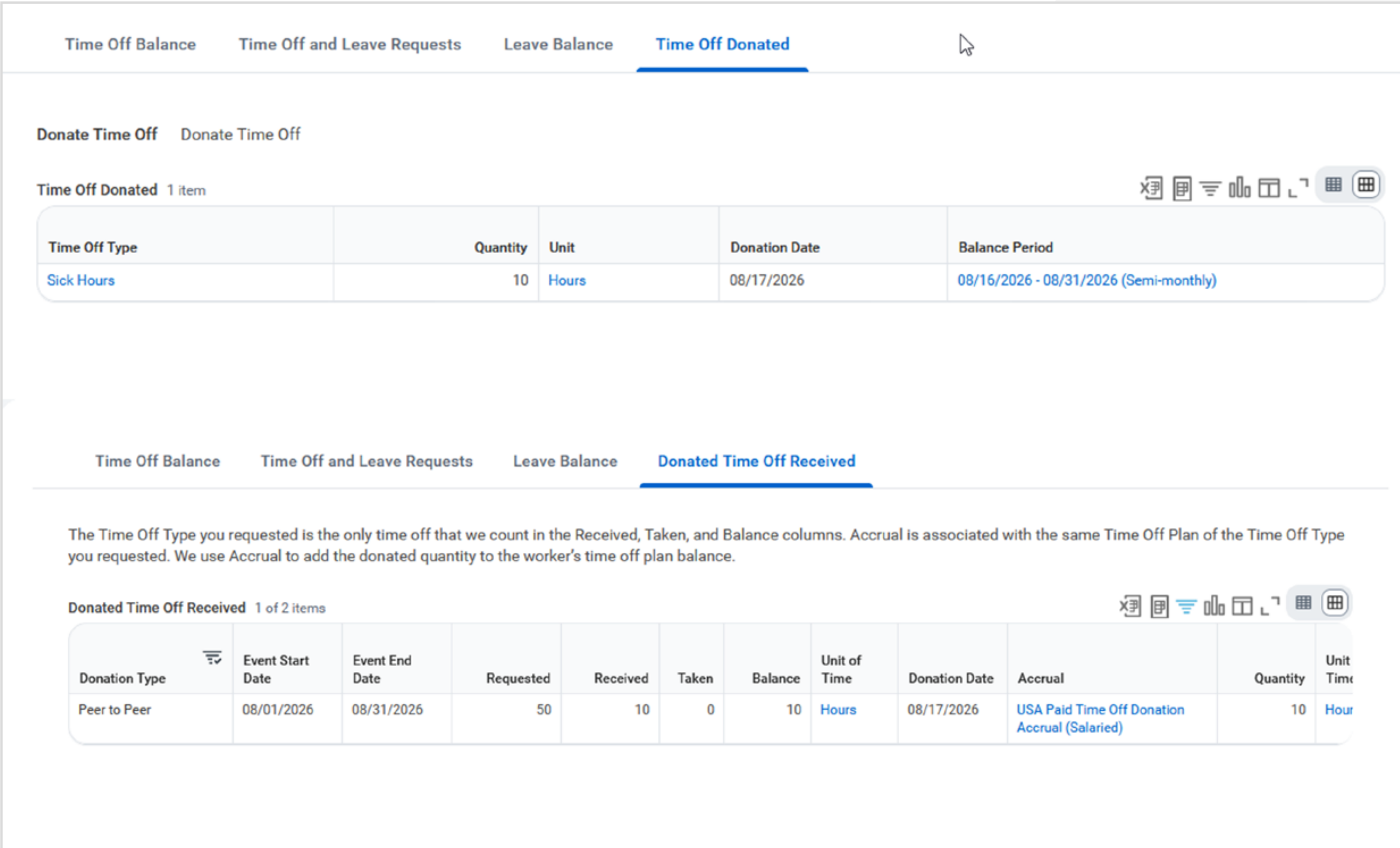








Donate Time Off.



TIME TRACKING.

Assign work Schedule Calendars per Position.

High impact

High effort

Optional

Workday now supports assigning work schedules per position rather than at the worker level. This enhances support for multiple positions across the Workforce Management suite. If you use work schedule calendar eligibility rules to default calendars, this only applies to primary positions, and the work schedule needs to be manually assigned to the additional positions.

Your next steps

- In Tenant Setup, review and configure the Work Schedule Calendars section in Tenant Setup - HCM.
- When position-based work schedules are enabled, Workday displays a new position box on the Assign Work Schedule or Assign Custom Work Schedule task.

Good to know

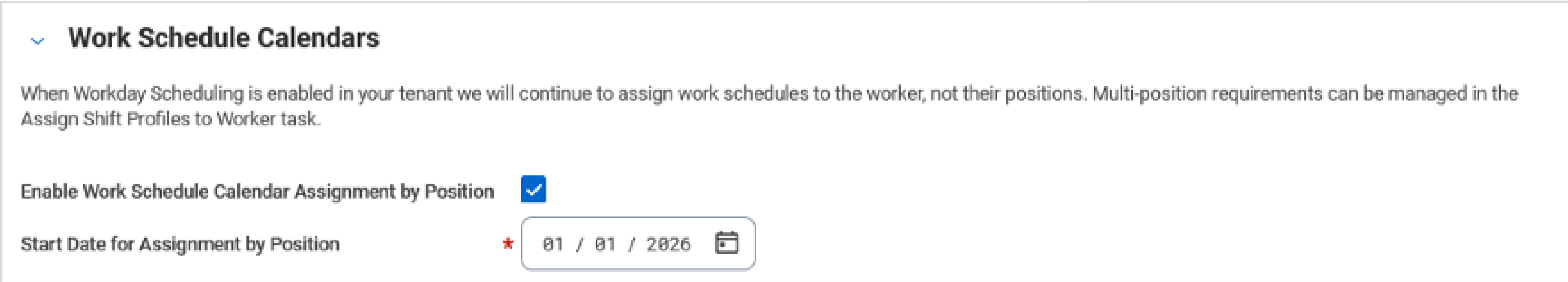
With position-based work schedules, the following are not supported:

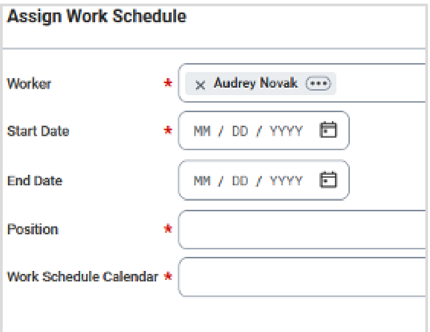
- Self-Service Edits
- Managers' ad-hoc changes using the My Teams Work Schedule report

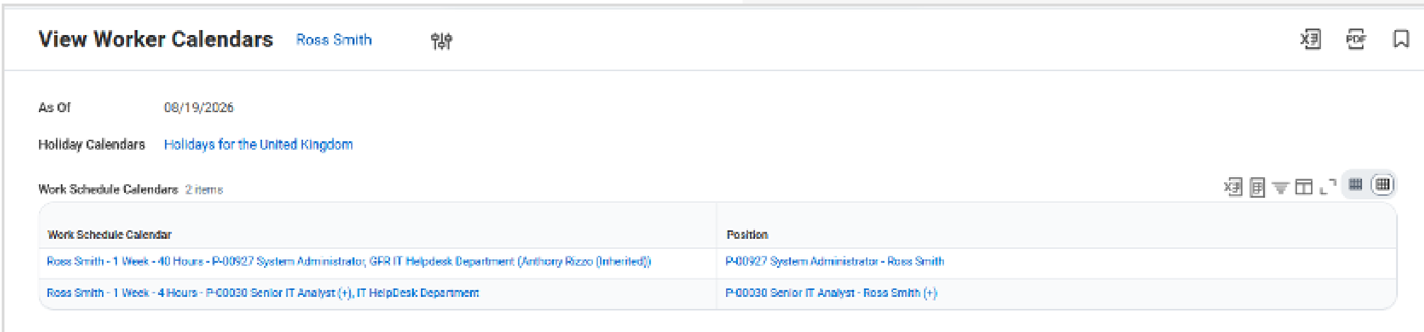
Cross-functional impacts, including with Absence and Payroll, should be thoroughly tested.

Learn More

Assign work Schedule Calendars per Position.







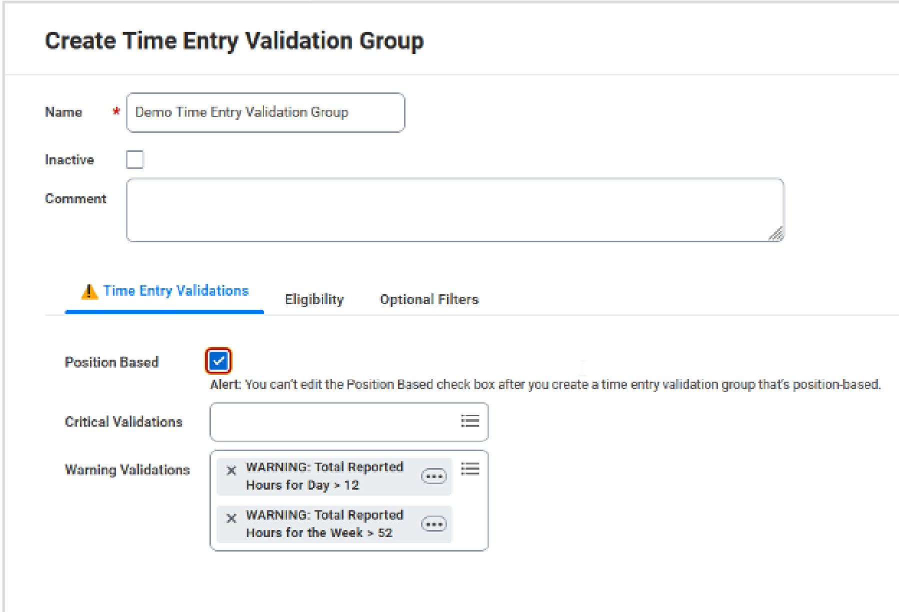
Time Entry Validations for Multiple Positions.

High impact

High effort

Optional

If a worker has multiple positions, you can now create time entry validations at the position level. Persist Position on Time blocks must be configured at the tenant level to enable this. Workers can have both position-based and worker-based time entry validation groups at the same time. Previously, for workers with multiple positions, accurately configuring and displaying time entry validations based on the time entered in each position was unsupported.



Your next steps

Setup is required:

- Enable Persist Position on Tenant Setup.
- Edit or create a new time entry validation group and select the position-based check box.

Learn More

Position Display with Auto Fill from Schedule.

Moderate impact

Moderate effort

Optional

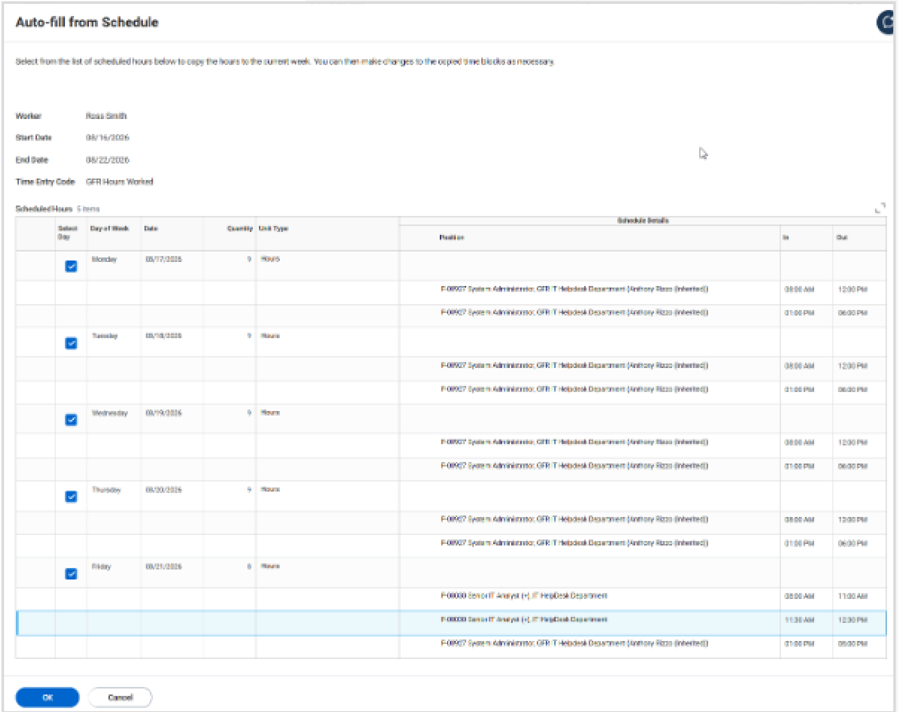
For workers who use auto-fill from schedule and have a position-based work schedule or Workday scheduling shift, Workday can now pull that position onto the time blocks when using auto-fill from schedule. This enhances support for multiple positions across the Workforce Management suite.

Your next steps

Setup is required. Enable Work Schedule Calendar Assignment Per Position in Tenant Setup - HCM.

Good to know

Reporting should be reviewed for cross-functional impacts along with integrations and payroll to ensure that all time is picked up as expected.



Learn More

Time Requests on Mobile.

Low impact

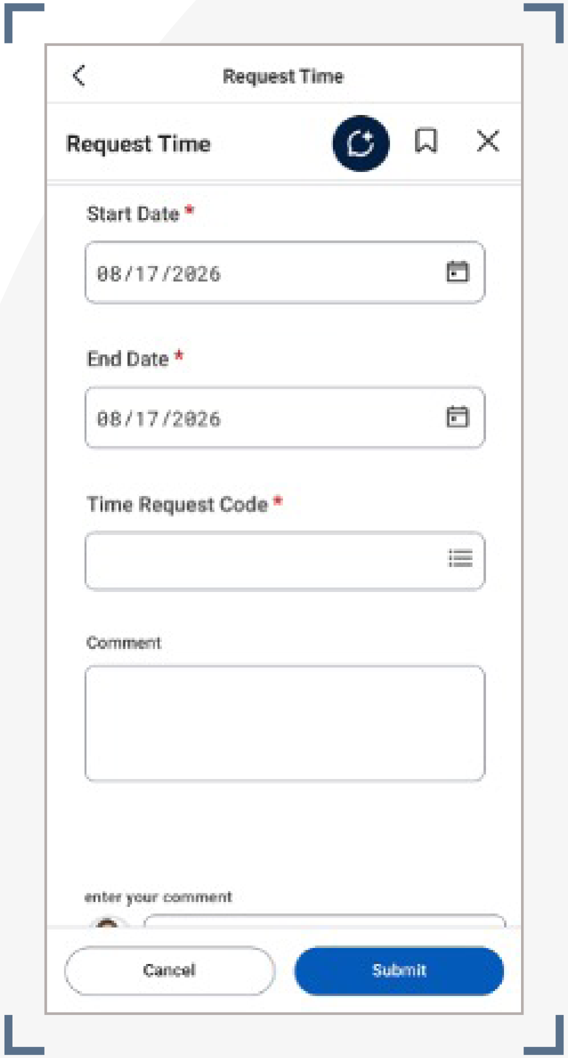
Low effort

Mandatory

Workday now supports the Time Request feature in the mobile application, including the time request report and the ability to submit new requests. Previously, this was not available in the Workday Mobile application, and workarounds were used.

Your next steps

This is automatically enabled. You may want to update your internal user guides or training materials.



Learn More

Time Kiosk Security Enhancements.

Low impact

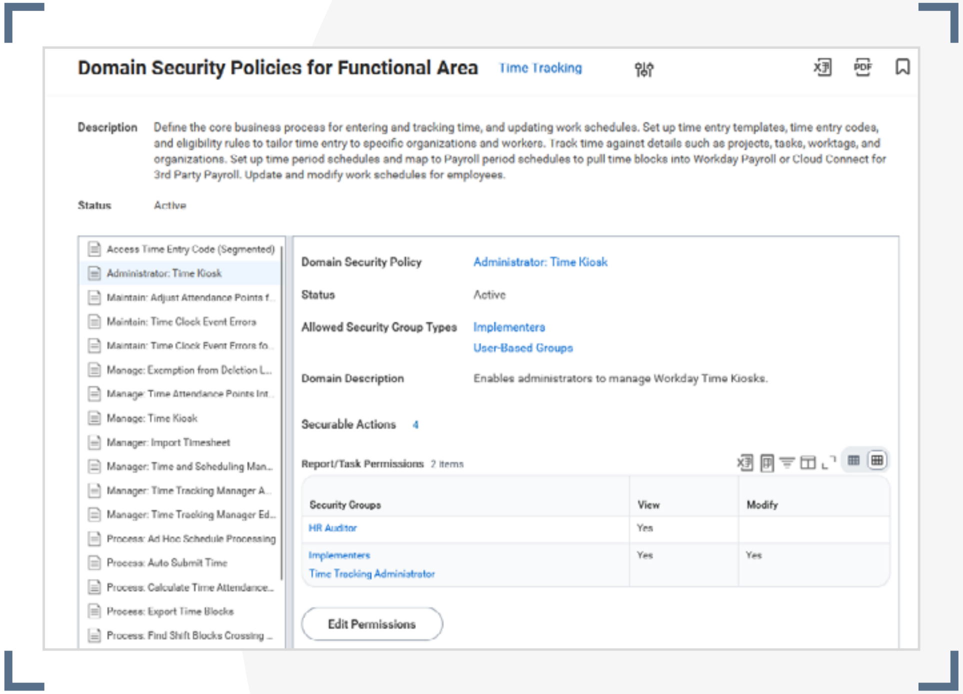
Moderate effort

Optional

Workday enhances the Time Kiosk setup for administrators by introducing a new domain to manage setup and reporting on Time Kiosks. Previously, the time kiosk report was secured to Set Up: Time Tracking, and it is now secured within its own domain for improved security. Without enabling this policy, administrators in companies that use time kiosks will no longer be able to edit or view time kiosks.

Your next steps

Setup the Administrator: Time Kiosk Domain by adding the relevant security groups and activating the security policy changes.



Learn More

Consolidated No-Shows for Attendance Management.

Moderate impact

Moderate effort

Optional

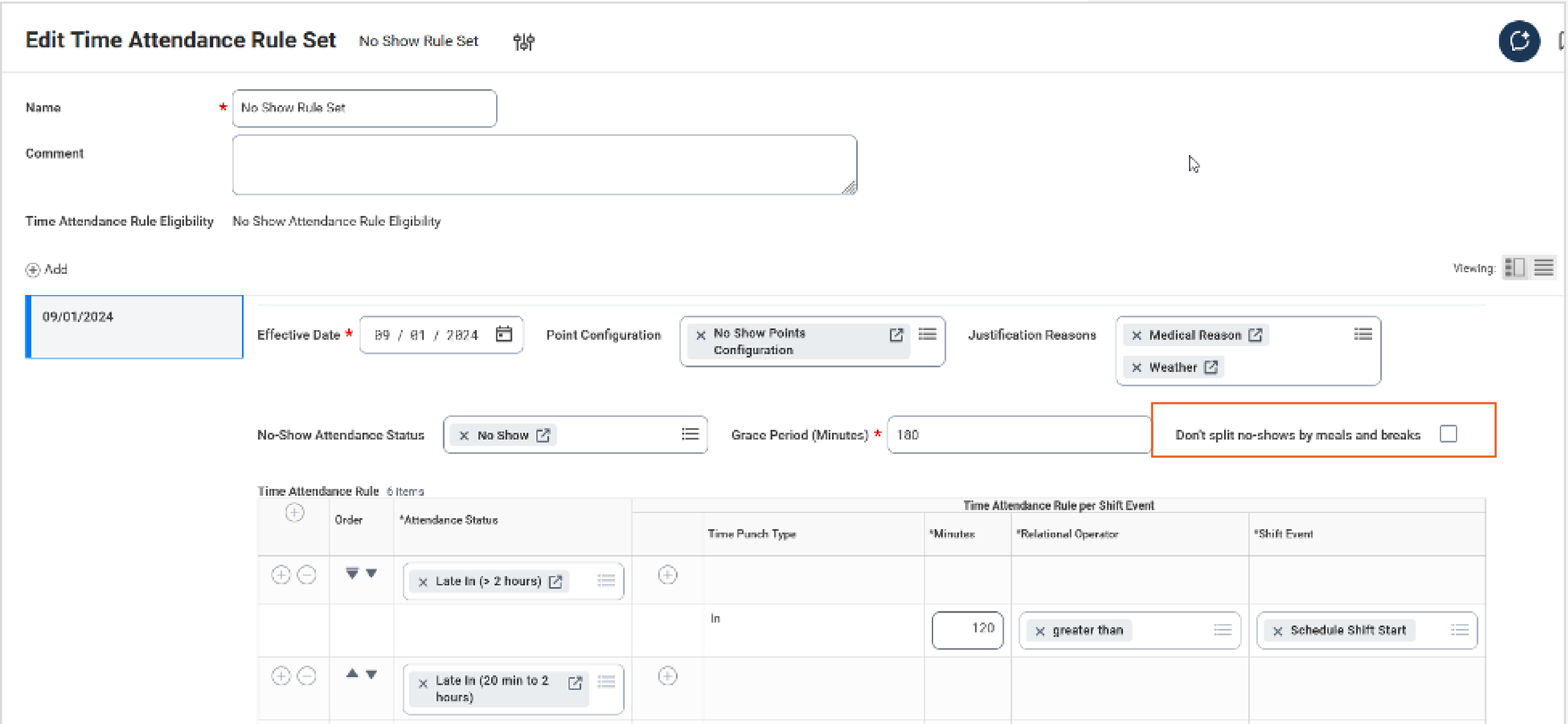
When allocating points to workers for missing shifts, you can now apply points only to the missing shift, rather than to multiple violations. Workday does this by adding a new checkbox to the Edit Time Attendance Rule Set and Create Time Attendance Rule Set screens. By default, Workday would apply multiple penalties for missing the same shift, and managers had to apply workarounds.

Your next steps

Edit the Time Attendance Rule Set and select the checkbox.

Learn More

Consolidated No-Shows for Attendance Management.



ADVANCED COMPENSATION.

Compensation Plan Rollout Process Enhancements.

Low impact

No effort

Mandatory

Workday adds a new Compensation Plan Rollout Process Results report, a matching report data source, and new Position and Rollout Process report fields. From the View Compensation Plan Rollout Process task, a new View Eligible Employees link lets you see who was eligible for a plan during a rollout.

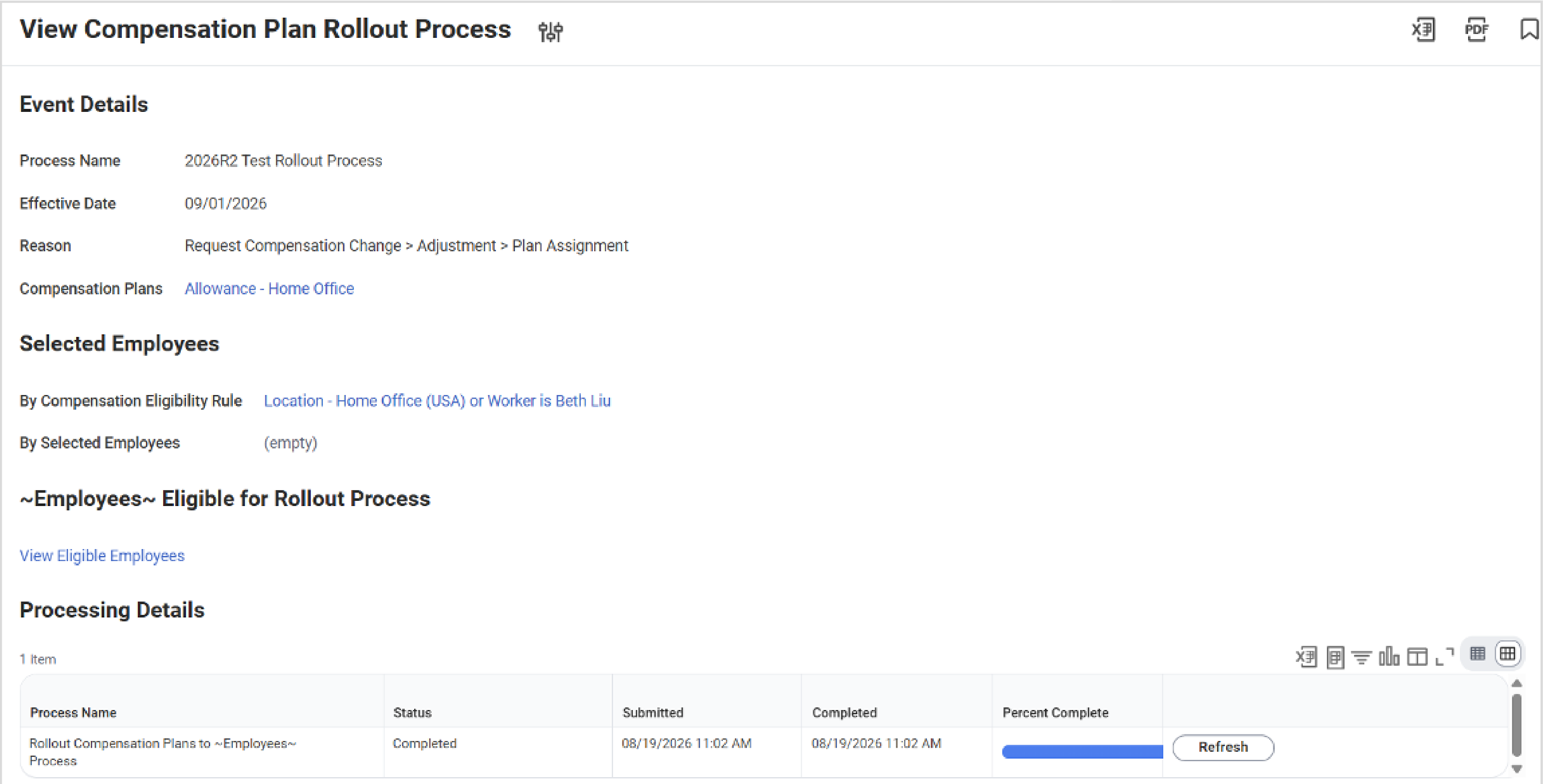
Rollout results are now much clearer and quicker to retrieve. Comp teams gain clear visibility into which eligible employees received a plan during a rollout, which did not, and why, making large plan rollouts far easier to review, troubleshoot, and audit without building manual workarounds.

Your next steps

- This is automatically available. To get value, explore the new View Eligible Employees link on completed rollouts.
- For insights outside the rollout process, consider building custom reports with the new Eligible Positions report data source and the new Position and Rollout Process fields.

Learn More

Compensation Plan Rollout Process Enhancements.



View Compensation Plan Rollout Process

Event Details

Process Name 2026R2 Test Rollout Process

Effective Date 09/01/2026

Reason Request Compensation Change > Adjustment > Plan Assignment

Compensation Plans Allowance - Home Office

Selected Employees

By Compensation Eligibility Rule Location - Home Office (USA) or Worker is Beth Liu

By Selected Employees (empty)

~Employees~ Eligible for Rollout Process

View Eligible Employees

Processing Details

1 Item

Process Name	Status	Submitted	Completed	Percent Complete	
Rollout Compensation Plans to ~Employees~ Process	Completed	08/19/2026 11:02 AM	08/19/2026 11:02 AM		Refresh

Compensation Plan Rollout Process Enhancements.

Compensation Plan Rollout Process Results

Compensation Plan Rollout Process Rollout Compensation

4 items

Worker	Position	Position Received Plan During Compensation Plan Rollout Process	Pending Business Process Preventing Assignment of Plan	Plan Already Assigned
Jacqueline Desjardins	P-00008 Director, Recruiting Services - Jacqueline Desjardins	No		No
Beth Liu	P-00010 Director, Payroll Operations - Beth Liu	No		No
Maria Cardoza	P-00011 Director, Employee Benefits - Maria Cardoza	No		No
Pauline Powers	P-40025 Director, Payroll Operations - Pauline Powers	No	Terminate: Pauline Powers	No

CORE COMPENSATION.

Percent-Based Bonus Plan Enhancements.

Low impact

No effort

Mandatory

Workday now supports greater precision in per cent-based bonus plans, allowing Target % values to be entered to four decimal places (for example, 5.6599%). This gives you more granular control and precision over numeric values when determining per cent-based bonus plans, helping you calculate and manage bonus awards more accurately. This is automatically available.

Learn More

BENEFITS.

Dependent Effective Dating.

Moderate impact | Moderate effort | Mandatory

Workday introduces effective-dated logic across key dependent information, allowing dependent data to be viewed and maintained as of a specific date.

Workers can also correct effective dates before submission, create future-dated dependents, and view updated dependent history more accurately across Benefits and related areas.

This improves the accuracy of dependent eligibility, historical reporting and regulatory compliance by ensuring dependent information is effective-dated rather than treated as a single current-state record. It also reduces administrative effort, since effective dates can be corrected before submission instead of requiring events to be cancelled and restarted.

Your next steps

- Review current dependent business processes, reports and integrations that use dependent data.
- Test Add, Edit and View Dependent flows, future-dated dependents and effective-date corrections.
- Review custom reports and integrations using dependent fields to confirm they still return the expected historical or current values using the new effective-dated fields.

Good to know

This impacts Benefits, Dependents, Beneficiaries, Emergency Contacts, Reporting and potentially integrations.

When a dependent is also recorded as a beneficiary or emergency contact, updates to the dependent's information now flow through to those related records. When a dependent is added or updated as a beneficiary, Workday creates two separate events: the dependent event uses the user-entered effective date, while the beneficiary event uses today's date.

This difference in effective dating should be considered when reviewing reporting, integrations and historical data.

Learn More

Dependent Field Expansion: Relocation Data.

Low impact

Low effort

Mandatory

Workday adds new effective-dated Dependent Relocation fields that let you capture whether a dependent is relocating with a worker on an international assignment, as well as the planned arrival and departure dates for the host location.

This lets you manage more international assignment and dependent relocation information directly in Workday. The effective-dated fields also improve historical reporting and provide better visibility into dependent movements during global mobility assignments.

Your next steps

- Review your current dependent and global mobility processes to determine whether dependent relocation data should be captured in Workday.
- Configure security for the new Self-Service: Dependent Relocation and Worker Data: Dependent Relocation domains.
- Review the Relocation (Dependent) localization setting.
- Test the new fields in Add and Edit Dependent processes.

Good to know

New effective-dated report fields are available for arrival date, departure date, and whether the dependent is relocating with the worker.

Learn More

Custom Calculated Health Care Rates.

Low impact

High effort

Optional

Workday lets Benefits administrators use the Calculation Engine to create custom health care rate logic. This supports more complex rate and proration requirements using worker attributes such as FTE, salary, hourly rate, scheduled weekly hours and age, with calculated premiums automatically flowing through to benefit enrolment.

It gives you much greater flexibility to support complex or country-specific health care rate calculations without relying on manual workarounds. It can improve premium accuracy, reduce administrative effort, and support scalable global Benefits designs when standard demographic or tobacco-based rate structures are insufficient.

Your next steps

- Review your current Health Care Rate configurations and identify plans that rely on complex calculations, manual workarounds or proration logic.
- Where appropriate, create a Custom Calculated Amount rate using the Calculation Engine, attach it to the relevant health care plan, and test calculations across different worker scenarios before deploying to Production.

Learn More

TALENT & PERFORMANCE.

Prompt Updates for AI-Generated Development Items.

Low impact

Low effort

Optional

Workday updates the Generate with AI experience for development items in Career Hub and Manager Insights Hub.

Workers and managers can now preview, regenerate, insert or replace AI-generated development item descriptions before applying changes.

This gives you a more consistent and controlled AI experience by letting people review AI-generated content and its sources before applying it, reducing the risk of unwanted changes and making AI-generated development content easier to use alongside manually entered text.

Your next steps

- Configure Development Items, set up Career Hub and/or Manager Insights Hub, and enable AI-Generated Development Items.
- Establish guidance for people to review, edit and verify AI-generated content before using it.
- Test the updated Generate with AI experience before wider rollout.

Good to know

This impacts Career Hub, Manager Insights Hub and Development Items. Existing user guidance may need updating because the previous Generate with AI and Modify with AI buttons have been replaced by the new AI prompt, and Revert to Original has been removed.

Learn More

Additional Inputs for Job Suggestions in Opportunity Marketplace.

Moderate impact

Low effort

Optional

Workday improves job suggestions in Career Hub and Opportunity Marketplace by using additional worker and job profile data, including inferred skills, skill experience, job interests, job families and job family groups.

This gives workers more relevant and consistent internal job recommendations by considering their experience, career interests, and inferred skills, helping them discover opportunities that better align with their background and development goals.

Your next steps

- Set up Job Opening Suggestions in Career Hub or Opportunity Marketplace.
- Review the quality of your foundational data, particularly Job Architecture and Skills, and make sure it aligns with company standards to improve the relevance of recommendations.

Good to know

This impacts Career Hub, Opportunity Marketplace, Skills and Job Architecture. Recommendation quality depends heavily on accurate, well-maintained foundational data. Job openings outside a worker's stated job interests or job family group may still be suggested.

Learn More

Career Development and Performance Tasks and Reports in the Career Hub.

Moderate impact

Moderate effort

Optional

Workday integrates career development, performance tasks, and reports into the Career Hub, making it a centralised location for self-service talent functionality. You can enable this version of the Career Hub without implementing the existing Career Hub or Skills Cloud.

Consolidating career development and performance reports and tasks into a single hub improves their findability and user experience and makes it faster and more convenient for workers to view and maintain their talent and performance data in Workday.

Your next steps

- Configure the relevant Career Hub features you plan to use, such as Check-Ins, Connections, Feedback, Development Items, Employee Reviews, Goals, Interests and Mentorships.
- Configure security for the Self-Service: Career Hub Talent and Performance domain, granting appropriate access to groups such as Employee as Self.
- Optionally, customise the Career Hub using Maintain Hubs.
- Review supporting security access to the Set Up: Tenant Setup - General and Set Up: Tenant Setup - Hub domains.
- Test the Career Hub experience and security before releasing it to workers.

Learn More

Unified Skills Experience.

Moderate impact

Moderate effort

Mandatory

Workday introduces a more consistent skills experience across the Worker Profile and Edit Skills task, providing contextual skill information, easier access to related actions, and improved interaction with suggested skills.

This creates a more consistent and intuitive skills experience across Workday. Workers can better understand their skills, view supporting information and explore related learning or opportunities, helping improve engagement with Skills Cloud and talent development functionality.

Your next steps

- Enable Skills Cloud if it is not already active.
- Optionally, enable Skill Descriptions, configure Skill Categories and Category Groups, and review Skill Sources and Skill Levels.
- To surface Learning and Flex Team suggestions, configure the relevant Opportunity Marketplace settings and underlying Learning and Flex Team functionality.
- Test the updated skills experience and security.

Good to know

This impacts Skills, Worker Profile, Skills Cloud, Learning, Flex Teams and Opportunity Marketplace, depending on enabled features. If Skills Cloud is already enabled, the new dropdown experience appears automatically. Additional content in Skill Pill Details depends on optional configuration and security. Workday plans to extend this experience to Career Hub in a future release.

Learn More

Purge Skills Data.

Low impact

Low effort

Mandatory

Workday expands the Talent Purgeable Data Type to allow additional skills-related data for terminated workers to be permanently removed, including skill assessments, external skill levels, position history, ratings and endorsements.

This gives you greater control over the retention and deletion of worker skills data, supporting data privacy, retention policies and compliance requirements when removing information for terminated workers.

Your next steps

No setup is required. Review your existing Talent purge schedules, retention policies and purge procedures to understand the expanded scope. Test purge processes where appropriate, and make sure stakeholders understand that associated skills data displayed in Career Hub may also be removed.

Good to know

This impacts Talent, Skills and Career Hub. If you use Talent purge processes, review the additional skills objects now included, since purging terminated worker data may permanently remove corresponding skills information visible in Career Hub.

Learn More

Generate Individual Goals.

Moderate impact

Low effort

Optional

Workday introduces AI-assisted suggestions for individual goal descriptions. Using a worker's job profile and up to 18 months of relevant talent data, the feature helps workers rewrite goals in line with SMART principles.

Workers can choose to rewrite a description, make it easier or more challenging, then review and edit the AI-generated suggestion before saving.
It can improve the quality and consistency of individual goals while reducing the effort required to write them. By drawing on relevant job, feedback, performance review, and previous goal information, Workday can provide more contextual suggestions.

Workers keep control over the final wording and can review, regenerate or manually amend the suggested description before submission.

Your next steps

- Confirm whether you are on MSA or UMSA. If you are on MSA, you must enable HCM ML Features and Third Party Connectors GA through Innovation Services. If you are on UMSA, you automatically receive access.
- Configure the Self-Service: AI-Generated Employee Goals domain within Performance Enablement.
- Test the Rewrite, Make Easier and Make More Challenging options in Preview before enabling for workers.

Good to know

This impacts Performance and Goals. The AI may use nonprivate feedback, previous goals, self-evaluation comments and job profile information, and no data contribution is required. If you have prescribed goal formats, test carefully, because SMART principles are incorporated into natural language and the output format is not configurable. Workday plans to extend this functionality to employee reviews.

Learn More

Employee Reviews: Skill Interests and Relocation Preferences.

Moderate impact

Low effort

Optional

Workday enhances the Career section of employee reviews to capture worker Skill Interests alongside more detailed short-term and long-term Relocation Preferences. The update extends the career information available during reviews and supports corresponding printouts, reporting fields and web service updates.

This gives you a more complete view of employee career aspirations during the review process. Capturing skill interests and relocation preferences can support career conversations, internal mobility, succession planning and broader workforce planning, while reducing the need to gather this information separately.

Your next steps

- Review your current employee and talent review templates to identify where the Career section and Relocation Preferences are already enabled.
- Consider whether Skill Interests should also be captured as part of the review process, and update the relevant templates by enabling Include Career Interest and Include Skill Interest.
- Test any template changes before the next review cycle.

Good to know

Existing active review templates cannot be edited, so introducing Skill Interests into an active cycle may require the review to be cancelled or rescinded and relaunched.

Learn More

TALENT ACQUISITION.

Additional Application Attachments and Document Categorisation.

Moderate impact | Low effort | Optional

This enhancement allows external candidates to upload additional supporting documents throughout the recruitment process, both during the application stage and after submitting their applications.

Candidates can assign a document category to each upload, making it easier for recruiters to identify and manage submitted documentation. Recruiters gain greater visibility of candidate documents through dedicated views and reporting, while administrators can control document categories, security settings, and when candidates are permitted to upload documents.

It streamlines document collection, improves the candidate experience, and ensures recruiters have timely access to important application information.

It also lets candidates provide supporting documentation without needing recruiter assistance; supports compliance and regulatory requirements by allowing you to collect and categorise multiple document types; improves recruiter efficiency through better visibility of new uploads; standardises document management using configurable document categories and category groups; and provides an auditable record of uploaded documents, including submission dates and selected categories.

Your next steps

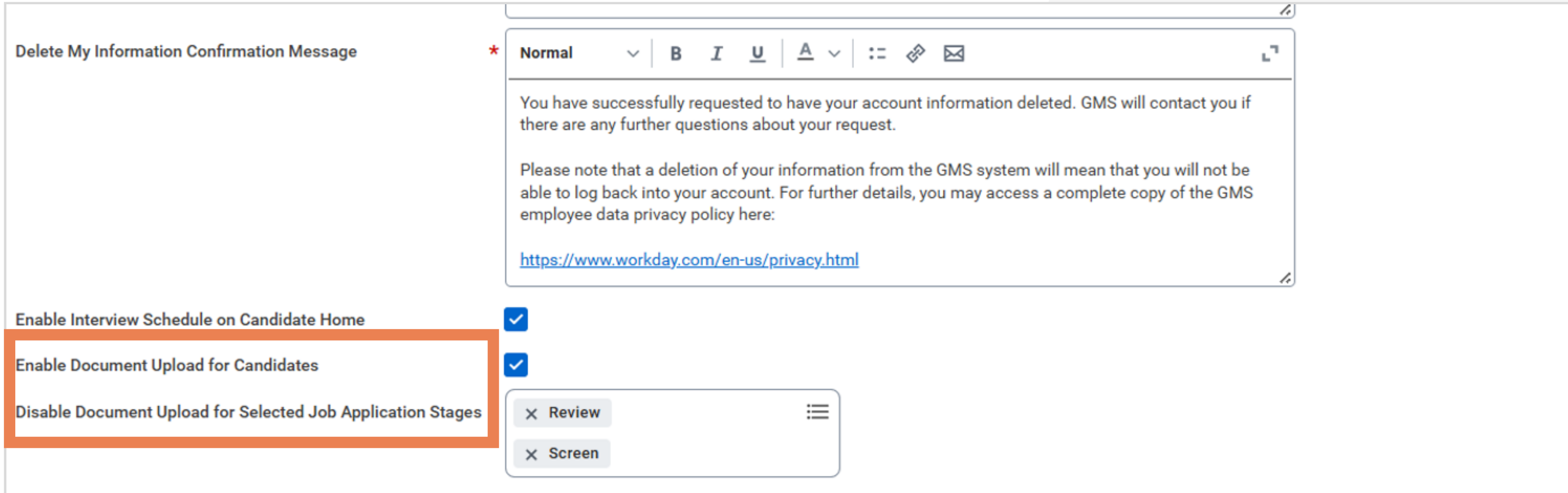
- Configure document categories.
- Group related document categories together using the new Recruiting Document Category Groups.
- Configure document category security to determine which groups can view candidate-uploaded documents.
- Update the relevant Job Application Templates to enable the new Additional Documents section.
- Update career site to enable candidate document uploads.

Good to know

- The feature applies only to external candidates.
- Candidates can upload up to 10 additional documents per job application.
- Uploaded documents cannot be deleted by either candidates or recruiters.
- Documents are stored against the specific job application to which they were uploaded rather than the candidate profile.

Learn More

Additional Application Attachments and Document Categorisation.



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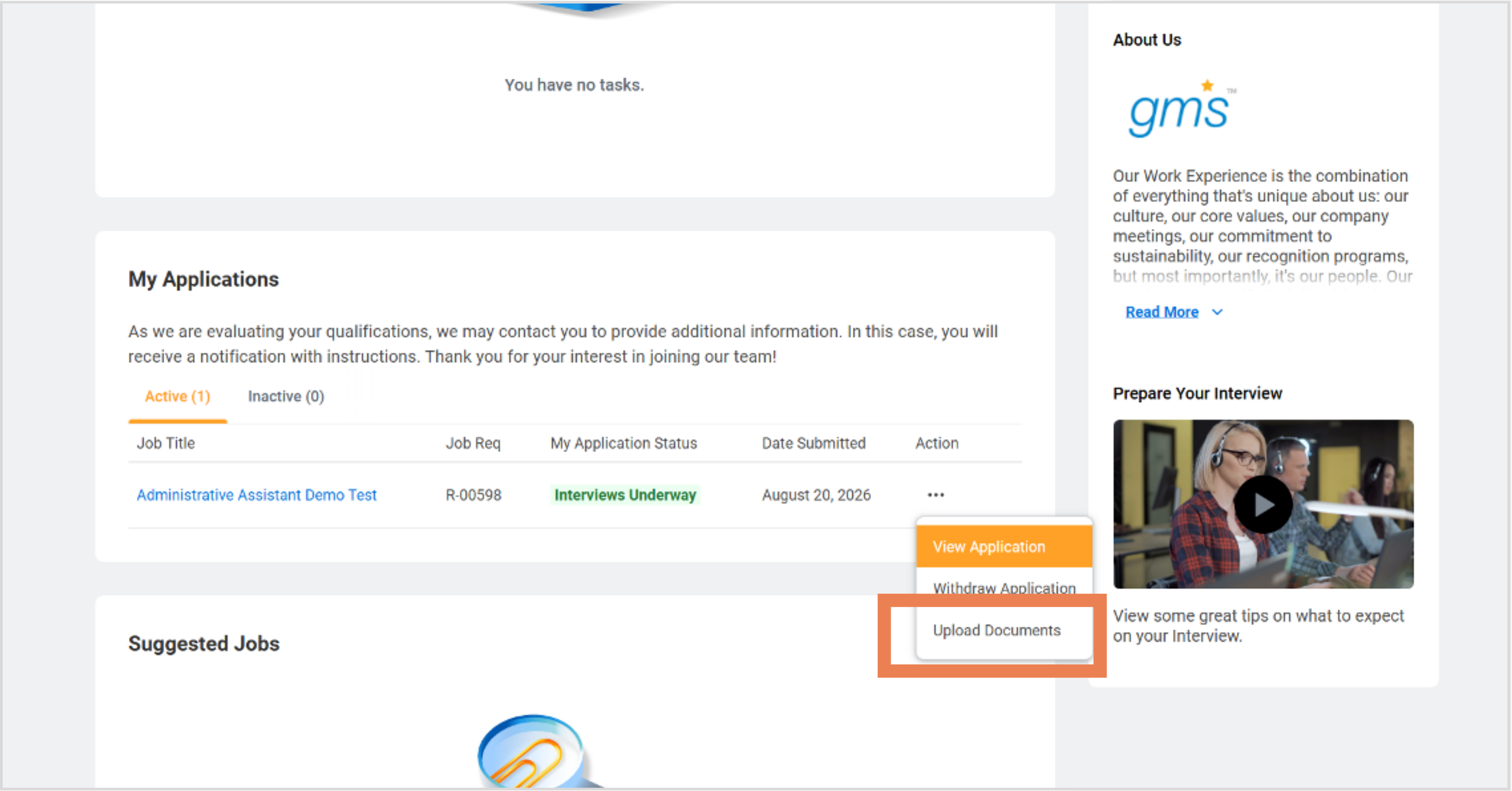

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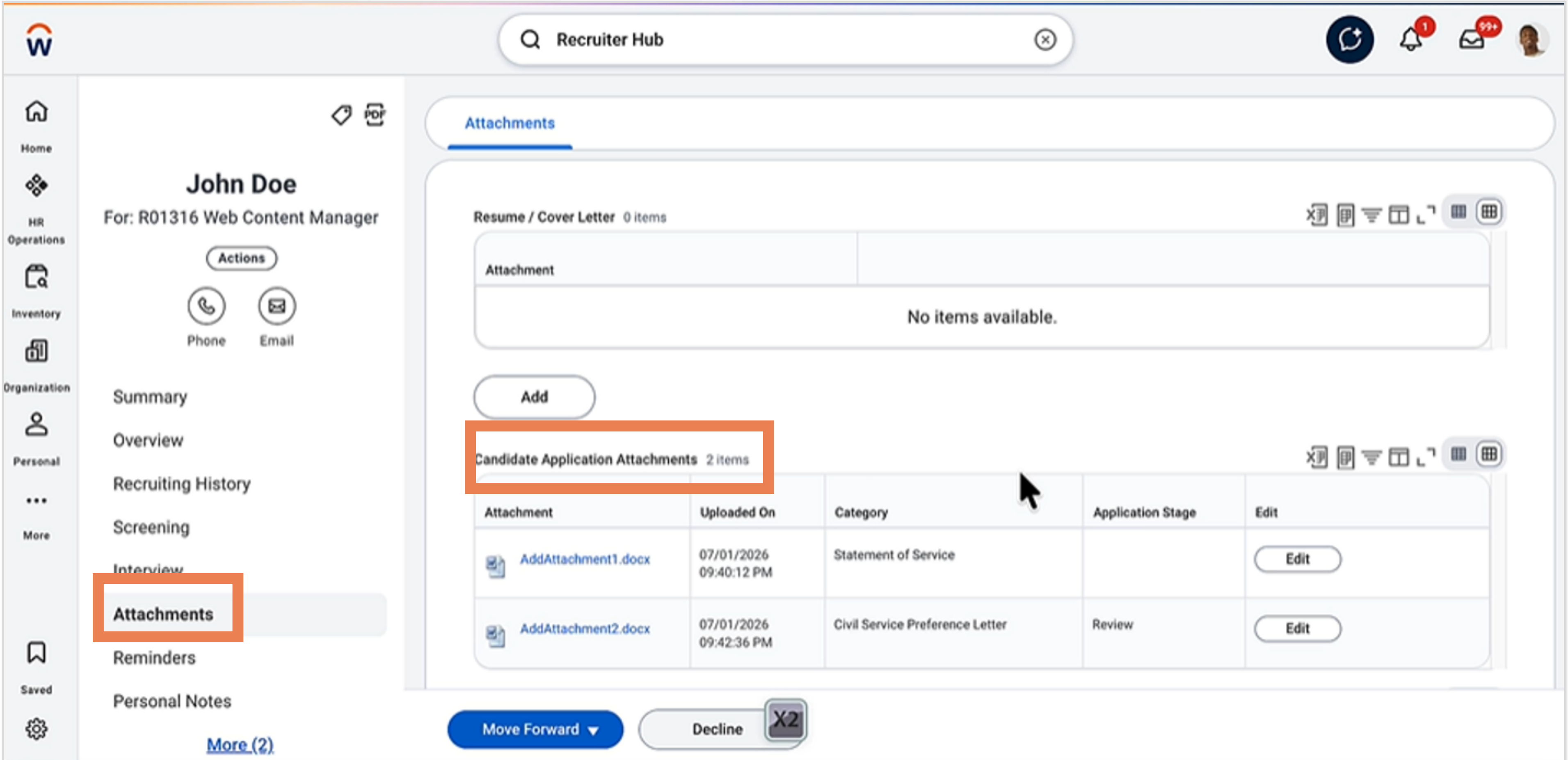


Improved Configurable Candidate Grid.

Moderate impact

Low effort

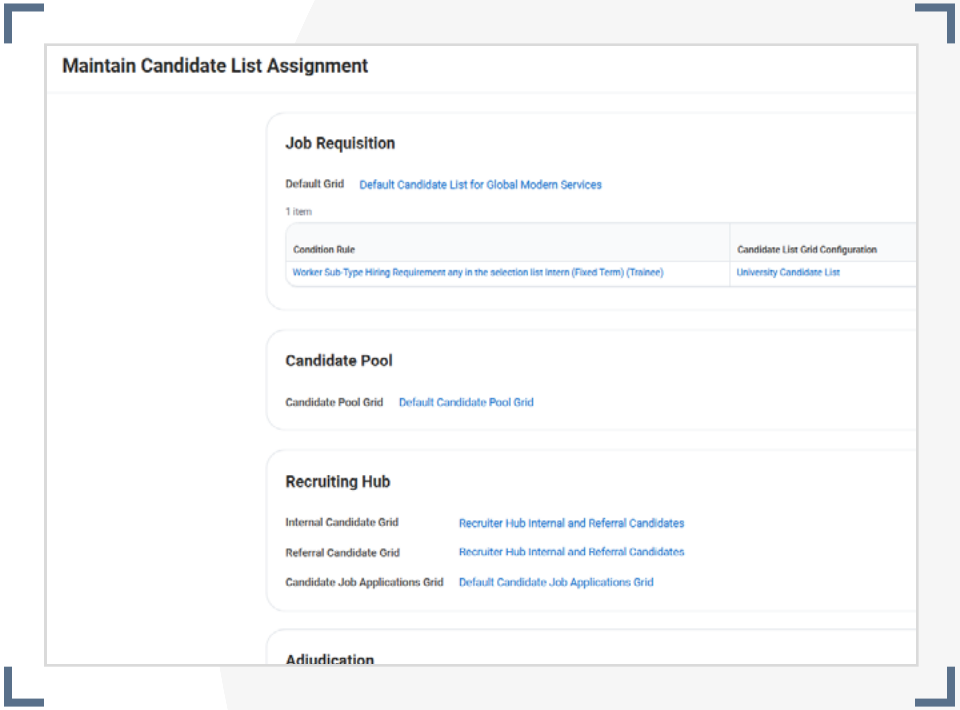
Optional

The enhanced Candidate Grid gives recruiters and hiring managers a modern, streamlined way to review and manage candidates. By bringing key candidate information into a single, configurable view, users can quickly filter, sort, and take individual or bulk actions without navigating between multiple screens.

You can tailor column layouts and default sorting to align with your hiring processes, which helps recruitment teams screen large applicant pools more efficiently, improve pipeline management, and make faster, more informed hiring decisions.

Your next steps

The enhanced Candidate Grid needs minimal setup. Configure which candidate data fields appear as columns, define default sorting preferences, and tailor layouts to align with your recruiting process. If you have existing custom candidate grid fields, review and test these configurations so the most relevant information is displayed. Once configured, recruiters can personalise filtering and sorting options within the grid to support more efficient candidate screening and pipeline management.



Learn More

Candidate Conversational Messaging for WhatsApp.

Moderate impact

High effort

Optional

Candidate Conversational Messaging for WhatsApp introduces end-to-end WhatsApp integration within Workday Recruiting, enabling you to engage candidates through their preferred messaging channel. The update includes WhatsApp configuration and consent management, recruiter tools for initiating and managing conversations, multilingual messaging support, candidate opt-in preferences, new security domains, reporting enhancements, and improved data management.

WhatsApp interactions are now embedded within the recruiting experience, giving you greater visibility, streamlined communication, and compliance controls, while maintaining candidate messaging history and privacy requirements.

Your next steps

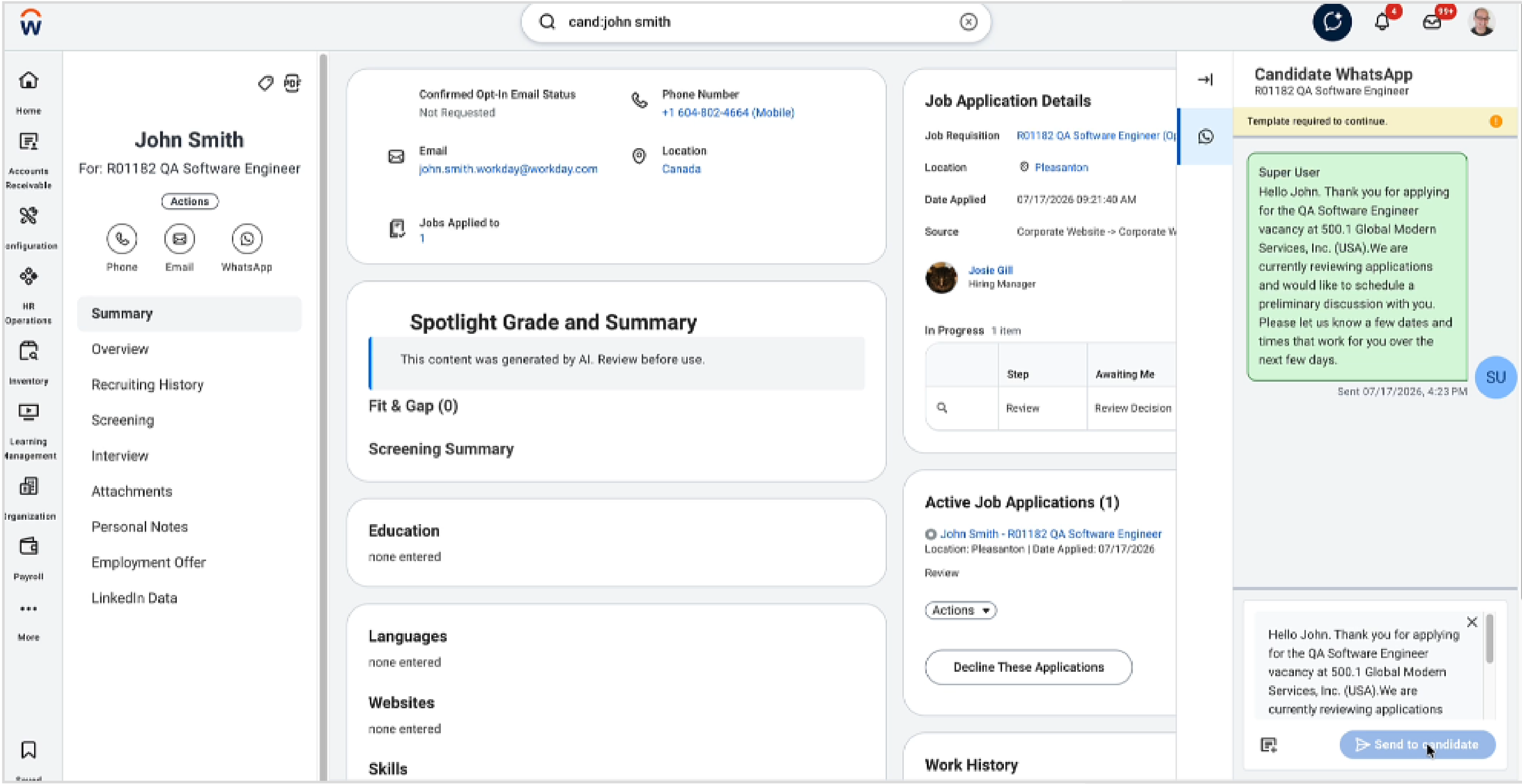
To enable Candidate Conversational Messaging for WhatsApp, you must have the Workday Messaging SKU, configure a Meta WhatsApp Business Account, and set up WhatsApp messaging within Workday. You will also need to:

- Review and update security permissions.
- Configure messaging consent and terms and conditions.
- Create and obtain Meta approval for WhatsApp message templates.
- Enable the WhatsApp opt-in option on your external career site.

If you are on the MSA, you may also need to enable the Workday Messaging service through Innovation Services.

Learn More

Candidate Conversational Messaging for WhatsApp.



UK PAYROLL.

Position Details on UK Payslip.

Moderate impact

High effort

Optional

Workday introduces new report fields to show a worker's position details on their payslip in Workday and on custom PDF payslips. A new Display Positions check box on the Maintain Payroll Payslip Configuration task, when checked, displays an additional Position column on the payslip for Absence balances, deductions, earnings and employer-paid benefits. This helps employees see a clear breakdown of their pay for each position they hold, and should reduce the number of queries the payroll team receives.

Workday does not support displaying positions on payslips using the Payslip (GBR) business form layout.

Your next steps

- Configure your earnings and deductions to include the Position calculation worktag for any pay components you want to display position details for. You cannot edit existing earnings and deductions to include the Position worktag, so copy these pay components and add the worktag on the new versions.
- Time Off Plans need to be position-based to display absence balances.
- Access the Maintain Payroll Payslip Configuration task and select the Display Positions check box.
- To display absence balances for all eligible positions, select the Show Absence Balances for All Eligible Positions check box. Leave it clear to display balances for the processing position only.

Learn More

UK Pensioner Payroll.

Moderate impact | High effort | Optional

Workday UK Payroll now supports pensioner payroll processing, letting you run payroll for pension recipients directly within Workday.

If you pay occupational pensions, you can now consolidate pensioner payroll into Workday, removing the need to manage pension recipients in a separate payroll system.

Your next steps

- Use the Maintain Employee Types task to create your organisation's employee types for each pensioner category you support.
- On the Maintain HR Mapping for UK Payroll task, map your own pensioner employee types to the relevant Workday-owned pensioner employee types.
- Use the Assign UK Payroll ID task to assign a UK Payroll ID to each pensioner record, selecting Pensioner as the assignment reason.
- On the View RTI Data Item Configuration task, for the RTI FPS submission type, click Maintain RTI Data Item to map your pension earnings and PCRCs to data items 34, 146 and 148. Use the new Trivial Commutation Type PCRC when mapping data item 146.
- To report trivial commutation payments, attach the Workday-owned Trivial Commutation Type PCRC to your relevant earning. Use this earning for payroll input or web service loading to specify the payment type. If you do not do this, HMRC rejects any FPS that includes values for data items 34, 146 and 148.
- After running payroll, review the Advanced Exceptions report to monitor any pensioner payroll FPS validation exceptions.

Learn More

HMRC Gateway Credential Store.

Moderate impact

No effort

Mandatory

To improve the secret storage of your HMRC Gateway credentials, Workday delivers a new Maintain HMRC Gateway Credentials task, which lets you record or update a single credential store per UK Employer Reference. When running your EPS, FPS and Incoming Notification integrations, Workday now checks whether HMRC Gateway credentials are configured before sending or retrieving any HMRC data. All HMRC Gateway credentials can be managed and stored in one place, removing the need to configure them separately for each integration.

Your next steps

This is automatically available. Workday automatically migrates your current HMRC Gateway credentials from the existing EPS, FPS and Incoming Notifications integrations to the new credentials store, with each credential associated to its UK Employer Reference during migration. You can use the new Maintain HMRC Gateway Credentials task to record or update HMRC Gateway credentials.

Learn More

UK Court Orders from Different Issuing Authorities.

Low impact

No effort

Mandatory

The Record UK Court Order for Worker task has been updated to allow you to record court orders for workers from multiple issuing authorities. If a worker does not have sufficient earnings to cover all order amounts, Workday deducts the amount in the order of priority. This enables the accurate calculation of all a worker's order records while applying the correct deductions. This is automatically available.

Learn More

Payroll Third Party Payments: Salary Sacrifices.

Moderate impact

Low effort

Optional

With this update, salary sacrifice arrangements, such as pension and childcare, are supported through Payroll Third-Party Payments, with correct contribution amounts to third-party providers. Workday processes correct values for salary sacrifice, reducing manual adjustments.

Your next steps

- Open the deduction recipient for your United Kingdom third-party payment setup.
- On the Payroll Third-Party Payments grid, select an earning in the Pay Component field where applicable. Enable Salary Sacrifice is then automatically selected.

Good to know

If UK Salary Sacrifice is not configured for Payroll Third-Party Payments, Workday continues to post salary sacrifice amounts as negative debits instead of positive liability credits. The updated accounting treatment applies only once the Salary Sacrifice checkbox is selected on the deduction recipient and Deduction Recipient is added as a dimension in Account Posting Rules.

Learn More

USA PAYROLL.

W-2, W-2GU and W-2VI Forms.

Moderate impact

Low effort

Mandatory

Effective for Tax Year 2026, W-2 forms and their related tasks, reports and web services are updated with three changes. First, Box 14 - Other is renamed to Box 14a - Other. Second, three new codes are added to Box 12

- 12 TA: Employer contributions under a section 128 Trump account contribution program paid to a Trump account.
- 12 TP: Total amount of cash tips reported to the employer.
- 12 TT: Total amount of qualified overtime compensation.

Third, a new column is added for Box 14b - Treasury Tipped Occupation Code(s), which displays up to two Treasury Tipped Occupation Codes (TTOCs). If a worker has more than two, Workday displays the two most recently updated codes.

This compliance update supports the H.R. 1 bill during year-end tax reporting for W-2 forms in the United States, Guam and the Virgin Islands.

Your next steps

- To see the new codes for Box 12 on your W-2 forms, you must map pay components or pay component-related calculations to those boxes on the View W-2 Box Configuration report.

Learn More

W-2C Forms.

Low impact

No effort

Mandatory

Workday updates W-2C forms and their related reports, tasks and web services to support the H.R. 1 bill. Effective for Tax Year 2026, the update makes three changes. First, Box 14 - Other is renamed to Box 14a - Other. Second, three new codes are added to Box 12:

- 12 TA: Employer contributions under a section 128 Trump account contribution program paid to a Trump account.
- 12 TP: Total amount of cash tips reported to the employer.
- 12 TT: Total amount of qualified overtime compensation.

Third, a new column is added for Box 14b - Treasury Tipped Occupation Code(s), which displays up to two Treasury Tipped Occupation Codes (TTOCs). If a worker has more than two, Workday displays the two most recently updated codes.

This compliance update supports the H.R. 1 bill during year-end tax reporting for W-2 forms in the United States. It is automatically available.

Learn More

Enhanced Direct Deposit.

Moderate impact

Moderate effort

Optional

Enhanced Direct Deposit lets workers select a financial partner and create an account with them through employee self-service payment elections.

When workers navigate to their payment elections, they see a new Add My Bank Account page with the enabled financial partners. The worker authenticates the partner, which takes them out of Workday to do so. This improves accuracy by reducing manual entry of account details.

When this feature becomes available in Production, these financial partners are available on the Enhanced Direct Deposit tab:

- OnePay
- Cash App
- Chime
- EarnIn
- PayPal

Your next steps

- Effective 1 October 2026, workers can create accounts with any financial partners that have not been disabled, and use those accounts for their regular payroll payments. If there are financial partners you do not want workers to use, you must disable them by 30 September 2026.
- Disabling financial partners can happen at any time. To disable them in the tenant, use the Maintain Payroll Services Configuration task and, on the Enhanced Direct Deposit tab, disable the partners you do not want workers to access.

Learn More

California State Disability Deductions.

High impact

Low effort

Mandatory

The California State Disability Insurance (SDI) subject and taxable wages functionality has been updated to correctly resolve when a worker has wages allocated to another state in addition to California. This enables more accurate calculation of wages by aligning the California SDI subject and taxable wages functionality with California SUI subject and taxable wages.

Your next steps

If the California state tax authority is configured as an exception for the SUI Taxable or SUI Taxable Reduction pay component groups, add these deductions as exceptions to those pay component groups:

- California State Disability Insurance (SDI) - Mandatory (California)
- California State Disability Insurance (SDI) - Optional (California)

If you do not do this, California State Disability Insurance (SDI) subject and taxable wages will not resolve correctly.

Learn More

CORE PAYROLL.

Exclude Workers from Retro Pay Calculation.

Low impact

No effort

Mandatory

When running the retro pay calculation task and select specific pay groups or pay group details, workers can be excluded from those pay groups using the Employees to exclude prompt.

This lets the payroll team process retro without delay, since workers with errors can be excluded, allowing retro to run successfully for all other workers in the pay group. It is automatically available.

Learn More

Payroll Accounting Reallocation.

Low impact

Low effort

Optional

Workday has created a new task for pay accounting reallocation on completed prior pay periods, where a costing allocation event has occurred that could cause updates to accounting when reprocessed. This improves the process for making payroll accounting adjustments to correct accounting on completed payroll results.

Your next steps

- Select the Enable Payroll Accounting Reallocation setting in the Maintain Payroll Accounting Options task.
- Create or update the domain security policy for the Process: Run Payroll Accounting Reallocation domain.

Learn More

Proration based on Work Schedule Calendar.

High impact

High effort

Optional

Workday introduces an Enable Proration Using Work Schedule Calendar checkbox when creating or editing an earning or deduction. Proration of earnings and deductions can be based on the hours or days defined in each worker's assigned work schedule, with separate calculations for each position when a worker holds multiple positions.

There is also a new proration event for Australia, Ireland, and the UK that triggers proration for mid-period work schedule calendar changes. For workers without a work schedule, Workday uses the work shift where available, or a Monday-to-Friday work week.

This allows for more accurate calculations when schedules have rotating patterns, when shift durations vary by day, or when there are mid-period changes to the work schedule.

Your next steps

To enable proration based on work schedule calendars:

- Select the Enable Proration Using Work Schedule Calendars check box.
- In the Calculation Proration section, select the new Prorate Using Hours Worked option, or one of the existing methods.

For payroll in Australia, Ireland and the United Kingdom, to enable payroll proration based on work schedule calendar change:

- In the Calculation Proration section on the Effective Dated tab, select Prorate Using Days Worked, Prorate Using Calendar Days, or Prorate Using Annual Working Days.
- On the Events Causing Pay Component Proration prompt, select Work Schedule Calendar Change.

If you do nothing, Workday continues to use the default configuration, which prorates pay components based on your existing configuration.

Learn More

Request Edit Payroll Inputs Business Process.

Low impact

Low effort

Optional

Workday introduces a new Request Edit Payroll Input process, letting payroll partners request updates to eligible payroll inputs, including end dates, allowed input values and supporting documentation, with requests routed to payroll administrators for approval through My Tasks.

This establishes a controlled, approval-based workflow for changes to payroll inputs, which reduces the risk of unauthorised and unaudited payroll modifications and provides payroll administrators with full visibility into proposed changes before they take effect.

Your next steps

- Users need View and Modify access to the Worker Data: Payroll (Payroll Input) domain to initiate and review requests.
- Prerequisite: Configure the Request Payroll Inputs Business Process. Steps: Set Up Request Payroll Inputs Business Process.

Learn More

Integration Recoverability for Global Payroll Connect.

Moderate impact

Low effort

Optional

With Integration Recoverability, PECI or WECI integration events can be relaunched if they have failed. A new option on the integration template is delivered for PECI and WECI: when relaunching the integration event, you can select the With Completed DIS Documents option to restart an integration event where the DIS files were created but a later part of the integration failed. This reduces the manual effort and time required to fix failed integration events.

Your next steps

To use the new option:

- Access the Integration Event for a failed PECI or WECI run.
- Verify that the DIS files were correctly generated during the original run.
- From the related actions menu on the event, select Integration Event, then Relaunch Integration Event.
- On the Re-Launch Integration task, select the With Completed DIS Documents check box.

If you do not use the new relaunch option, your integration recovery processes remain unchanged.

Learn More

Worker has Additional Jobs Field on PECI.

Moderate impact

Low effort

Optional

The Worker Has Additional Jobs field attribute is delivered on the Worker Status data section for the PECI integration template, reporting whether a worker has additional jobs beyond their primary job. This helps your integration identify workers who have more than one position.

Your next steps

- From the related actions menu of the PECI integration, select Integration System, then Configure Integration Attributes.
- Enable the field attribute in the respective data section.

Learn More

LEARNING.

Modernized Learning Home, Discovery, and Course Consume.

Moderate impact

Low effort

Optional*

Workday modernises the desktop learner experience across Learning Home, Discover, My Learning, and course, program and path consumption. Updates include refreshed navigation and layouts, redesigned cards and sliders, improved lesson navigation, larger media displays, richer lesson content, and clearer completion and failure indicators.

This gives learners a cleaner and more consistent experience for discovering, accessing and completing learning. Improved navigation and clearer progress indicators should make assigned learning, onboarding, compliance, and development content easier to complete while giving learners better visibility into lesson status and completion.

Your next steps

- If you use Workday Learning without Workday Learning, powered by Sana, review the updated learner experience and enable Learning Course, Home and Discover UI Enhancements through Maintain Feature Opt-Ins if you want to adopt it.
- If you have a Sana subscription, the changes are already in Production, so review and test the updated experience.

Good to know

This primarily impacts the Workday Learning learner experience. The modernised UI is currently desktop only. If you use Workday Learning powered by Sana, you have already received these changes in Production.

Learn More

*Optional but likely to be mandatory in a further release

Configurable Email Routing for Engagement Builder.

Low impact

Low effort

Optional

Workday adds configurable email routing to Engagement Builder, letting you choose where engagement messages and reminders are sent.

Administrators can route emails using the default notification configuration, home email only, work email only, or work email with home email as a fallback.

This gives you greater control over how engagement communications reach workers and supports different communication policies across engagement types. It can improve delivery reliability and help ensure messages are sent to the most appropriate email address based on the purpose of the engagement.

Your next steps

- Review your existing Engagement Builder configurations and current email routing policies.
- Determine whether any engagements should use a specific routing option rather than Default Routing, and update the Email Destination Priority where appropriate.
- Test engagement emails and reminders to confirm they are delivered to the intended work or home email addresses.

Good to know

This primarily impacts Engagement Builder and notification delivery. Existing engagements continue to use the configured default notification routing unless a different destination priority is selected.

Make sure the worker's work and home email addresses are accurate before using routing options that depend on those addresses.

Learn More

Insights for Engagement Builder.

Low impact

Low effort

Mandatory

Workday adds a new Insights tab to Engagement Builder, giving administrators visibility into engagement performance. The dashboard includes assignment volumes, processing errors, notification delivery, learning completion rates, audience membership and message performance, supported by visualisations that vary depending on the content and messages included in the engagement.

This gives you a clearer view of how learning engagements are performing without relying on separate reporting. The new insights can help identify processing errors, monitor learner completion, assess notification effectiveness and understand engagement audience trends, making it easier to evaluate and improve learning campaigns.

Your next steps

No setup is required. Review the new Insights functionality within your existing Engagement Builder engagements and consider how the available metrics can support ongoing monitoring and administration.

Good to know

Metrics and visualisations depend on the number and type of learning items, messages and send conditions configured within each engagement. You can use Refresh All to retrieve the latest available engagement information.

Learn More

Campaigns to Engagements Migration.

High impact

High effort

Mandatory

Workday introduces a self-service migration tool that moves eligible audiences, campaigns, message templates and translations from the legacy Campaigns dashboard into Engagement Builder. The migration preserves the existing setup while avoiding duplicate learning assignments or notifications and places migrated campaigns on a four-times-daily processing schedule.

Workday plans to retire the Campaigns dashboard and its associated Campaigns domains, tasks and reports in 2027 R1. This gives you a supported path away from the legacy Campaigns framework before its retirement.

The migration tool reduces manual effor
t, retains your existing campaign configuration and translations, and lets you migrate to Engagement Builder without having to recreate all existing campaigns from scratch.

Your next steps

- Review your existing Campaigns and audiences and identify which should be migrated to Engagement Builder.
- Configure access to the Manage: Campaign Migration domain.
- Test the Migrate Legacy Campaigns to Engagement Builder task in a non-production tenant first.
- Review migrated campaigns, message templates, translations and scheduling behaviour before completing the Production migration.

Good to know

The Campaigns to Engagement Builder migration is not reversible. When campaigns are migrated, Workday also migrates associated legacy message templates and translations, does not trigger duplicate assignments or notifications, and does not reassign waived assignments.

Migrated campaigns are scheduled to run four times per day, and run logs only show activity occurring after migration. Legacy message templates remain usable but cannot be edited.

Learn More

Learning Courses Linking to Development Items.

Low impact

Low effort

Optional

Workday lets workers and managers link active, searchable Learning courses directly to development items. The new Learning field is available across standalone development item tasks, Employee Reviews, Talent Reviews and Career Profile, creating a stronger connection between individual development planning and available training opportunities.

This creates a clearer link between development goals and specific learning activities. Employees can identify the courses they plan to complete, managers gain better visibility into development plans, and reporting on planned training for workforce development, compliance, and budget planning improves.

Your next steps

- Review your current Development Item configuration and decide whether Learning courses should be available.
- Enable the Learning field through Configure Optional Fields for View Development Items.
- Review Learning segmented security.
- Test the field across standalone Development Items, Employee Reviews and Talent Reviews before enabling for users.

Good to know

Standard Learning segmented security applies to the new field, helping prevent restricted courses from being exposed.

Learn More

Enhanced Learning Assignments: Creating Assignments.

High impact · Moderate effort · Mandatory

Workday introduces new Manage Learning Assignment and Mass Manage Learning Assignment business processes, alongside new Assign My Team and Mass Assign Learning Content tasks.

These give managers and Learning administrators more flexible ways to assign required or recommended learning, and introduce dedicated assignment events for improved control, reporting and retraining management.

The changes reduce administrative effort when assigning learning and let managers assign content directly to their teams. The new assignment framework also provides stronger business process control, improved reporting and a clearer distinction between learning assignments and enrolments. It supports the automated creation of retraining assignments when learners complete content that requires periodic retraining.

Your next steps

- Review the new Mass Manage Learning Assignment and Manage Learning Assignment business processes, including the security automatically copied during conversion.
- Review access to Assign My Team and Mass Assign Learning Content.
- Configure any required approval or review steps.
- Test assignment creation, retraining and reporting.
- Make sure the Completion Step on Mass Manage Learning Assignment occurs before the Manage Learning Assignment action step.

Good to know

Workday automatically creates assignment events for existing learning assignment records and creates business process definitions for the two new processes. Assignments created through the new tasks generate individual assignment records for each learner and content combination.

Learn More

Enhanced Learning Assignments: Completing Assignments.

Moderate impact | Low effort | Mandatory

Workday introduces a new Complete Learning Assignment business process that creates an event when assigned learning is completed.

Learning administrators can use the process to trigger additional steps, such as questionnaires, integrations, reports, and custom notifications, immediately after a learner completes assigned learning. This gives Learning administrators more flexibility and control over post-completion activities.

You can automate follow-up actions after learning completion, improve compliance processes, trigger downstream integrations or reporting, and provide more tailored communications to learners without relying on separate manual processes.

Your next steps

- Review the new Complete Learning Assignment business process and determine whether additional post-completion steps or notifications would add value.
- Review security, condition rules and available report fields.
- Test any new questionnaires, integrations, reports or notifications before introducing them into Production.

Good to know

Workday automatically creates completion events for previously completed learning assignments through tenant conversion, excluding open and waived assignments.

Where one enrolment completes multiple assignments, Workday creates a single completion event.

Learn More

Course Replay Restrictive Controls.

Moderate impact

Low effort

Mandatory

Workday Learning introduces a new configuration option for digital and blended courses that prevents learners from reviewing course content after completion. When enabled, replay options are removed, lesson links are disabled, and direct access to completed lesson content is blocked across desktop and mobile.

This supports strict compliance, regulatory or academic integrity requirements by preventing learners from revisiting completed course or assessment content. It helps protect sensitive or proprietary training materials, reduces the risk of inappropriate post-completion access, and provides a more controlled learner experience.

Your next steps

- Review digital and blended courses where post-completion access should be restricted.
- Enable Disable View Course Again on the relevant courses through the Create Course or Edit Course tasks.
- Test the learner experience across desktop and mobile, including completion pages, program navigation, direct lesson links and retake scenarios.

Good to know

When enabled, completed learners cannot use replay or review options, and direct access to the lesson is blocked. New reporting fields are available to identify the configuration status.

Learn More

REPORTING.

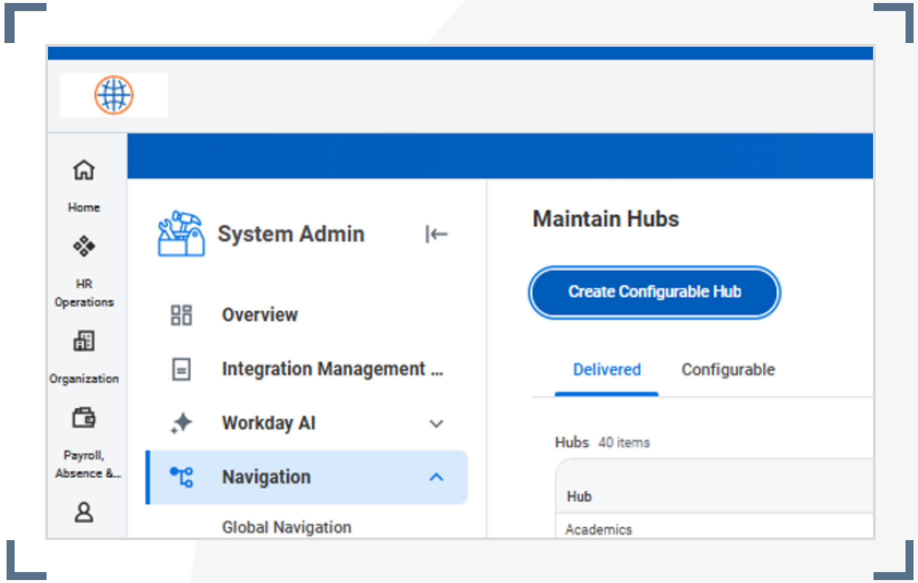
Configurable Hub.

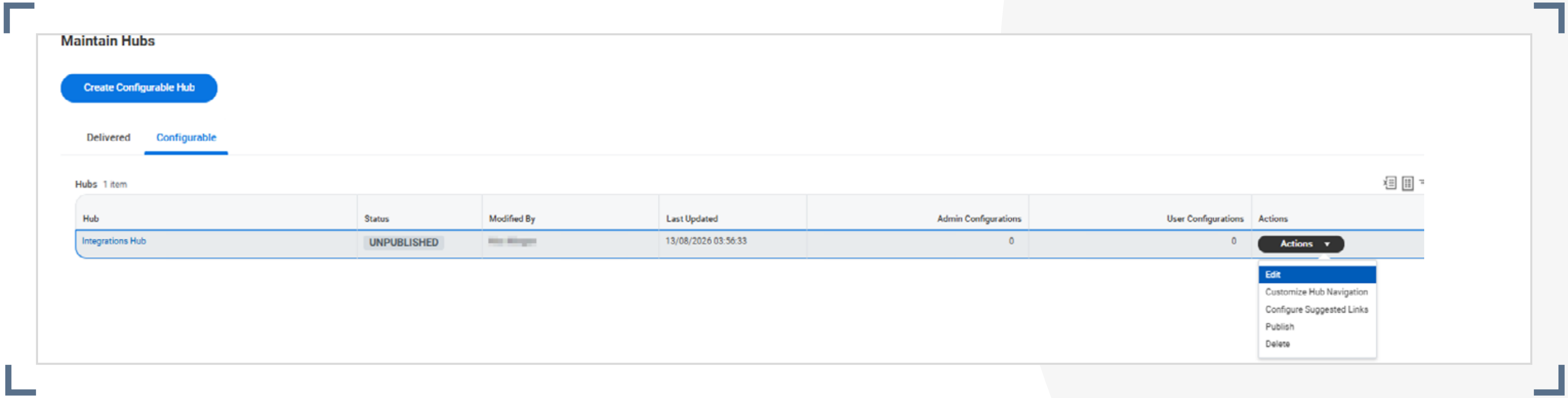
Moderate impact | Low effort | Mandatory

You can now create, publish and manage custom hubs in a centralised workspace. The feature is automatically available to authorised users.

Your next steps

Use the Maintain Hubs task to build customised hubs, manage user access, add relevant links, and make hubs available through the global navigation menu for easy access across Workday.





Learn More

Export Report Writer Charts as PNG.

Low impact

No effort

Mandatory

You can now download and export charts directly from your Report Writer reports and dashboard worklets as PNG images. This lets you save, reuse, and share your report visualisations in external presentations, emails, and offline documents without manually recreating them, saving time and keeping the data accurate. It is automatically available.

Learn More

Hub Navigation Segmentation.

Moderate impact

Low effort

Optional

With this release, you can customise the visibility of hub navigation items to control what is visible to users based on relevance to your population and business.

You can configure visibility rules for both delivered and custom hubs using the Maintain Hubs task. This lets you control which navigation sections, tasks, reports, dashboards and Extend apps users can see, based on security groups, condition rules, or worker attributes such as geography, job profile and organisational role. The same configuration applies across Workday desktop and mobile experiences.

Your next steps

To use this feature, configure condition rules and security groups using the Maintain Hubs task, and apply them to navigation groups or navigation items on both delivered and configurable hubs.

Learn More

Workday Slides.

Moderate impact

Moderate effort

Mandatory

Workday is retiring Slides, with no replacement.

If you are still publishing Slides, they will need to be replaced with a different format of reporting. Discovery Boards are worth investigating if you have not already done so.

Your next steps

- Update any training documentation that references the feature, and consider alternative presentation tools.
- Preserve existing slides by downloading them through File, then Download, and exporting them as PDF or PowerPoint (PPT) files. Note that these exports are static copies and cannot be modified after download.

Learn More

PEOPLE EXPERIENCE.

Article Ownership.

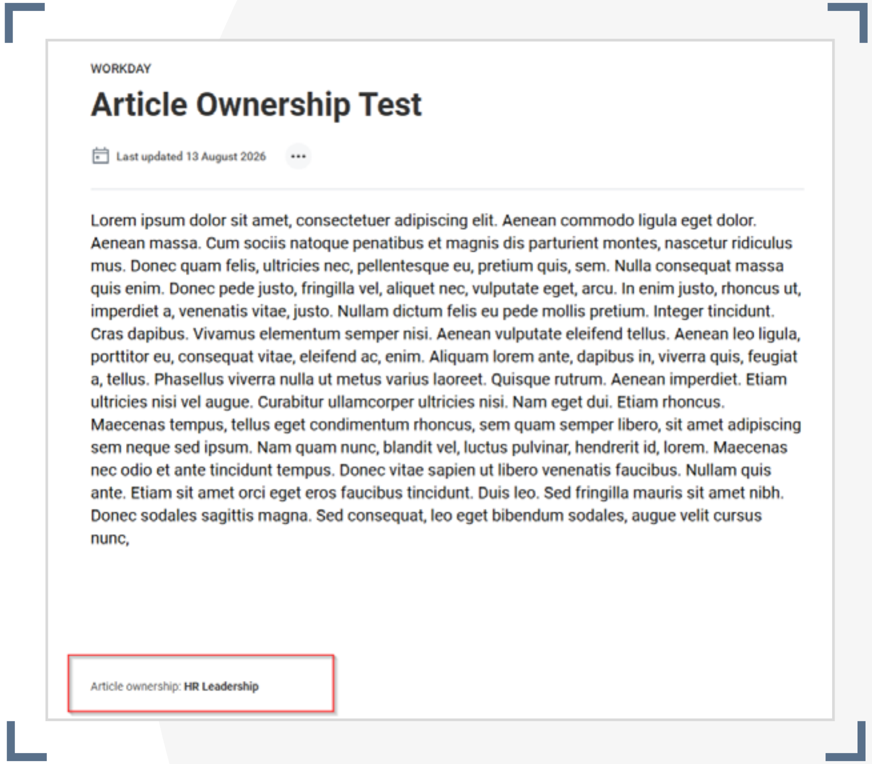
Low impact

Low effort

Optional

You can now record and display article ownership to manage content responsibilities effectively.

Identifying the owner of an article enables better reporting, and employees or admins with visibility access can see who manages the content without needing additional permissions to access reports or the help article workspace.



Your next steps

Enable the Show Ownership Field on View check box from within Edit Tenant Setup - Help.

Learn More

Article Downloading.

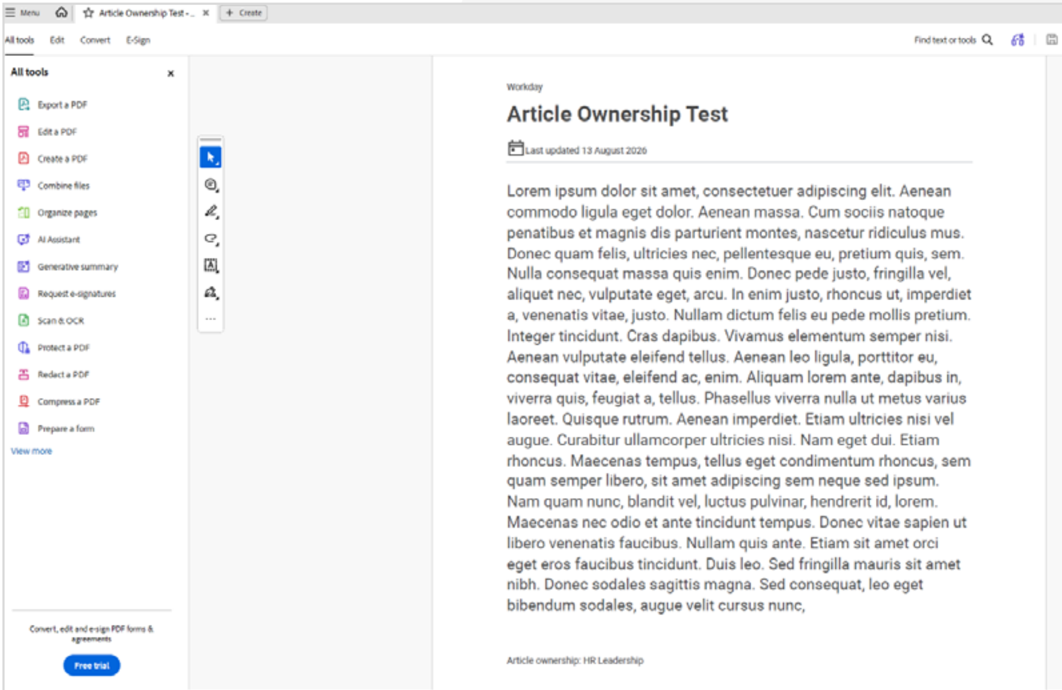
Moderate impact

No effort

Mandatory

You can now download or print a knowledge article when using the View Article task or viewing it from the search results.

You can now download or print a knowledge article when using the View Article task or viewing it from the search results. This increases efficiency by removing browser-dependent printing constraints when viewing articles. It is automatically available: workers who can view a knowledge article can use the article's related actions to download it as a PDF or print it.



Learn More

Share Cases with Other Service Team Members in Workday Help.

Moderate impact

Low effort

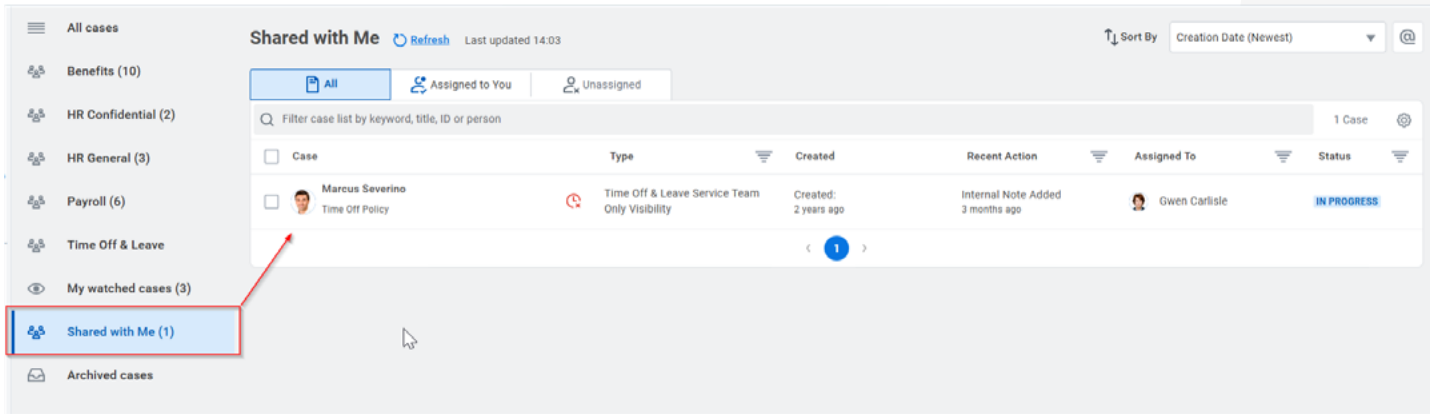
Optional

Workday now lets case solvers securely share cases with members of other service teams.

Previously, case solvers had to reassign a case to another service team, which meant they lost visibility into the case until it was reassigned.

Your next steps

Toggle the "Enable case sharing for non-confidential cases with members of your service team, a different service team and external collaborators" radio button in Tenant Setup - Help.



Learn More

Team Highlights Updates.

Low impact

Low effort

Mandatory

Instead of a single Team Highlights section, manager insights are now more flexible and organised. Rigid layouts are now replaced with a flexible 'My Team' widget.

Managers no longer see the Team Highlights section on their Workday home page. They can quickly view their direct reports from the new My Team card, navigate to their worker profiles, view the org chart, and see insights about their direct reports directly on the home page.

Your next steps

Workday automatically enables the My Team widget for managers. If you have opted out of the Configurable Workday Home Page feature, manually add the new My Team widget to the home page by clicking Edit Work Tools on the Home Cards Workspace.

Learn More

JOURNEYS.

Journeys Conditional Progression.

Moderate impact

Moderate effort

Optional

You can now control the order in which employees complete step groups in a journey.

Apply conditional progression to a journey to ensure employees complete step groups in the intended sequence before advancing to the next group.

This is valuable for onboarding, compliance and multi-phase development programs where sequencing matters.

Your next steps

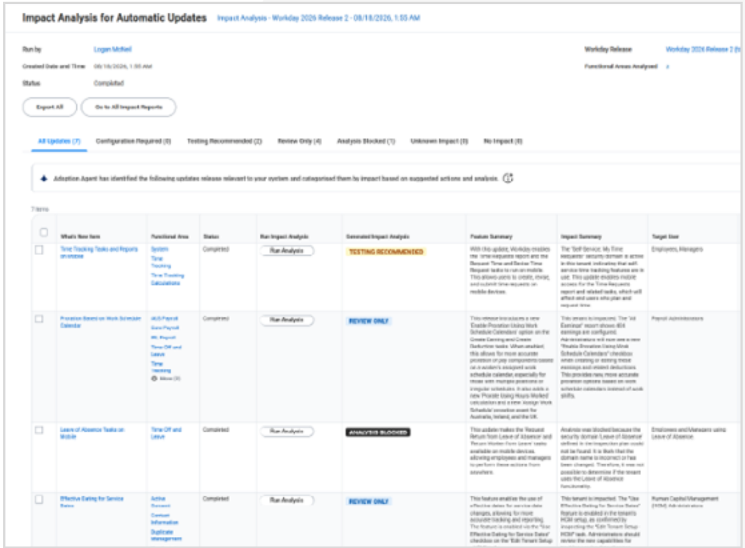
- Access the journey in the Journeys editor.
- Select the Conditional Progression toggle located on the top right of the editor.
- Save your changes and click Publish.

Learn More

AI.

Adoption Agent.

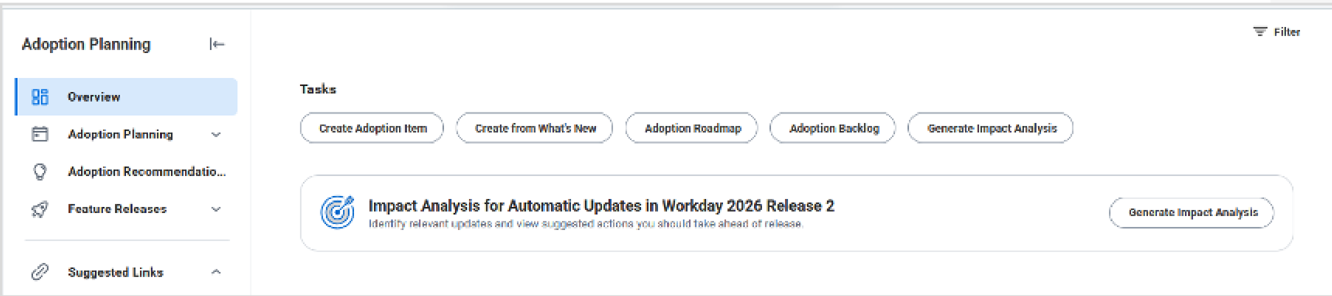
Moderate impact | Low effort | Optional



Workday now has the release impact analysis skill to analyse upcoming release items against your tenant and advise on how to categorise them. This helps you take guidance from the agent on which release features to prioritise for testing as part of each Workday release cycle. Note that this is available in preview tenants but will not be deployed to Production until 2027 R1.

Good to know

- Agent of Record must be configured.
- The Adoption planning hub must be configured.
- You must also be on the UMSA.



Learn More

About us.

Preos specialises in ensuring organisations get lasting value from their Workday investment.

We were founded in 2021 by HR and Finance leaders who believe organisations deserve better after go-live. We built our reputation by ensuring clients get the value they expected from Workday, and that origin still shapes how we work. We are the UK's only Workday Services and Extend Partner founded on post-go-live optimisation expertise.

Specialised.

We work exclusively with Workday. That single focus means deeper platform expertise and a real understanding of its potential and constraints, so you reach value faster.

Highly experienced.

Our team is highly experienced and brings hands-on expertise across the technical, process, organisational and infrastructure sides of Workday, built over many years and across a broad range of sectors.

On your side.

We work as an extension of your team and give you the precise support each stage requires, so you are not paying for resources you do not use. We build your team's capability as we go, so you keep ownership of Workday and rely on us less over time.

Learn More ▶

Make the most of every release.

This guide offers our perspective on key areas to consider. Its true value lies in how you apply it to your organisation, objectives, and tenant.

We support you in evaluating each release, aligning relevant features with your roadmap, and implementing them effectively, from prioritisation and testing to team engagement.

The result is a platform that keeps pace with your business, release after release, and an investment that keeps delivering.

Talk to the Preos team to see what that could look like for you.

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