Administrator Guide Release Notes

Product Summary

March 12, 2025

Contents

About Workday Documentation

March 14, 2025

About Workday Release Notes

Find, Filter, and Download Release Notes	UPDATED Added additional filter detail, updated the organization of the filters, and added some examples.
Concept: What's New in Workday Report	UPDATED Updated link from Concept: Workday Release Center to Reference: Workday Release Center.
Reference: Workday Release Center	UPDATED New topic. Moved content from Concept: Workday Release Center. Added information about how we label release notes with a release number.
FAQ: Release Notes	UPDATED Added FAQ for the VNDLY release notes schedule in the What's New in Workday Report.

October 4, 2024

About Workday Release Notes

Video Guidance for the Release Center	UPDATED Added information to provide video guidance about Release Center.

Adaptive Planning

March 14, 2025

Headcount Planning

Create Headcount Plans	UPDATED Added hierarchical routing content to Context.
Manage Headcount Planning Events	UPDATED Added hierarchical routing content to Step 2.
Complete Headcount Planning Participant Detail Events	UPDATED Added organizational view content to Steps 3-5. Added how to multiselect or select a range of positions to Step 5. Added line item to Result for hierarchical routing.
Create Headcount Forecast Plans	UPDATED Added hierarchical routing content to Context.

Set Up Adaptive Planning for HCM and Financials

Manage Financial Planning Configurations	UPDATED Added the ability to select top level hierarchies when you concatenate Revenue Category and Spend Category accounts to Step 4.

December 13, 2024

Publish Plans from Adaptive Planning

Reference: Publish Financial Plan Error Codes	UPDATED Added error for ledger accounts not included in the plan structure to A2096.
Steps: Publish Workforce Planning Actions from Adaptive Planning	UPDATED Removed prerequisite requiring enable and set up Workday Workforce Planning, and separate SKU.

November 8, 2024

Set Up Adaptive Planning for HCM and Financials

Manage Financial Planning Configurations	UPDATED Added Concatenations step, for creating planning-only concatenations without requiring actuals. Added that links to Adaptive Planning objects require User Sync for the links to function.

November 1, 2024

Headcount Planning

Create Headcount Plans	UPDATED Added a sentence in the Context about the real world job that this user performs using this topic.
Create Headcount Forecast Plans	UPDATED Updated a sentence in the Context about the real world job that this user performs using this topic.

Set Up Adaptive Planning for HCM and Financials

Troubleshooting: Clear External Mappings	NEW How to diagnose and resolve issues after clearing external mappings.

October 18, 2024

Setup Considerations: Adaptive Planning for HCM and Financials	UPDATED Updated what *Compensation Details: Headcount Planning* domain does.

Headcount Planning

Steps: Set Up Headcount Planning	UPDATED

	Updated what *Compensation Details: Headcount Planning* domain does.

Set Up Adaptive Planning for HCM and Financials

Manage Workforce Planning Configurations	UPDATED Added a paragraph about the **Secure Data** check box on the Roster Sheet step.
Clear External Mappings	UPDATED Information on clearing external mappings in Adaptive Planning.

October 11, 2024

Set Up Adaptive Planning for HCM and Financials

Troubleshooting: Migrate Workforce Planning Application Using Object Transporter	UPDATED In the Migration fails section, added a new cause related to changed Workday IDs (WIDs).
Troubleshooting: Migrate Financial Planning Application Using Object Transporter	NEW How to diagnose and resolve issues when migrating financial planning applications using Object Transporter 2.0.

October 4, 2024

Set Up Adaptive Planning for HCM and Financials

Manage Journal Line Summaries for Import	UPDATED Added balance sheets to what manage journal line summaries supports.

September 20, 2024

Concept: Using Adaptive Planning with HCM, Financials and AP&C	UPDATED Added the AP&C use case to title and introduction paragraph.

Publish Plans from Adaptive Planning

Steps: Publish Financial Plans from Adaptive Planning	UPDATED Added AP&C to the prerequisites.
Publish Financial Plans from Adaptive Planning	UPDATED Broadened the descriptions to include AP&C use case.
Schedule Publish Plans	UPDATED Updated the prereqs to include AP&C.
FAQ: Publish Financial Plans	UPDATED Added information about invalid account value mappings.
FAQ: Publish Financial Plans	UPDATED Removed FAQ about cancelling publishes. You can now cancel publishes.
Troubleshooting: Financial Plan Can't Publish	UPDATED Added information about troubleshooting errors about invalid account value mappings.

Set Up Adaptive Planning for HCM and Financials

Steps: Configure Adaptive Planning for HCM and Financials	UPDATED Added new Step 4 for unified access management (UAM).
Steps: Set Up SAML SSO into Adaptive Planning for Synced Users	UPDATED Added links to UAM topics from the Next Steps section.
Manage Financial Planning Configurations	UPDATED Added Enable balance sheet and removed Enable High Volume Extract in the Actuals page step.
Manage Financial Planning Configurations	UPDATED Added prerequisites for AP&C and clarified the prerequisites for Financials. Also added new translated currency field.
Concept: Financial Planning Configuration	UPDATED

	Added AP&C use case.

Adaptive Planning and Consolidation

March 14, 2025

Financial Accounting in AP&C

Set Up Account Sets in AP&C	UPDATED Updated to note that you can't retire ledger accounts that are in use on certain allocation pools or plans.
FAQ: Can I retire ledger accounts in AP&C?	UPDATED Updated to note that you can't retire ledger accounts that are in use on certain allocation pools or plans.
Steps: Set Up Close and Consolidation Hub in AP&C	UPDATED Updated to include information about replacing the default cards on the Overview page of the hub.
Steps: Replace Default Overview Cards on the Close and Consolidation Hub in AP&C with Custom Reports	NEW How to replace the default data visualization cards on Overview page of the Close and Consolidation hub in AP&C with insights from your own custom reports.
Reference: Close and Consolidation Hub Sections in AP&C	UPDATED Updated to include information about replacing the default cards on the Overview page of the hub.
Reference: Close and Consolidation Hub Cards in AP&C	UPDATED Updated to include information about replacing the default cards on the Overview page of the hub.
Reference: Workday-Delivered Reports for Financial Close in AP&C	UPDATED Updated to include information about the View Intercompany Reconciliation report.

February 21, 2025

Financial Accounting in AP&C

Concept: Currency Translation in AP&C	UPDATED Updated to provide more detail on how currency translation is performed.
Concept: Differences Between OfficeConnect and Report Writer in AP&C	UPDATED Updated the Rounding and Significant Digits with Currency Translation section with additional instructions on how to change default formatting for OfficeConnect data.

February 7, 2025

Financial Accounting in AP&C

Steps: Set Up Journal Insights in AP&C	UPDATED Updated Step 2 with new wording.

December 13, 2024

Financial Accounting in AP&C

Create Rules for Translating Ledger Accounts in AP&C	UPDATED Updated to clarify that Workday translates from company currency and not transaction currency.
Concept: Currency Translation in AP&C	UPDATED Updated to add clarity about how Workday translates amounts in reporting.
Concept: Financial Reporting in AP&C	UPDATED Updated to add clarity about how Workday translates amounts in reporting.

November 15, 2024

Financial Accounting in AP&C

Steps: Set Up Fiscal Schedules and Years in AP&C	UPDATED Updated the Context section with clarifications about creating 2 fiscal years for the same fiscal schedule.

November 1, 2024

Financial Accounting in AP&C

Steps: Maintain Access to Ledger Accounts in AP&C	UPDATED Renamed the domain name Ledger Account Segmented Setup to Set Up: Ledger Account Security Segments to align with domain naming standards

September 20, 2024

Adaptive Planning and Consolidation (AP&C)	UPDATED New book on how to combine the financial management consolidation process with a flexible agile planning process.

Adaptive Planning

Concept: Adaptive Planning in AP&C	UPDATED New concept about the use of Adaptive Planning in the new AP&C product.

Financial Accounting in AP&C

Steps: Set Up Consolidations in AP&C	UPDATED Updated topic title for clarity.
Steps: Set Up Alternate Fiscal Year Consolidations in AP&C	UPDATED Updated topic title for clarity.
Reference: Equity Pickup Results in AP&C	UPDATED

	Provides additional information in equity pickup results in Adaptive Planning and Consolidation.
Concept: Account Certification Dashboard in AP&C	NEW Information on the Account Certification dashboard in Adaptive Planning and Consolidation.

Authentication and Security

March 14, 2025

Configurable Security

Reference: Security-Related Reports	UPDATED Added a description of the new Security History for Users Audit Report.
Create Rule-Based Security Groups	UPDATED Updated the Prerequisites section to recommend checking theAllowed Rule-Based Security Group Types field on domains.
Steps: Change User-Based Security Group Assignments for a User	UPDATED Revised Step 3 to note the support of contextual routing to constrained role-based security groups.
Steps: Change Membership for a User-Based Security Group	UPDATED Expanded Step 3 to provide information on the support of routing to a User-Based Security Group Administrators security group.

Data Privacy

Concept: Masking Sensitive Data	UPDATED Added note regarding Instance ID cannot be parsed error.
Enable or Disable Data Masking	UPDATED Added note regarding Instance ID cannot be parsed error.
Reference: Purgeable Data Types	UPDATED

	Added a new Payroll section to bring together payroll attachments and withholding order attachments and added information on the external payroll document purgeable data type.
Reference: Purgeable Data Types	UPDATED Updated Financial Entities section with information about new purgeable data types.

February 21, 2025

Accounts

Steps: Set Up Unified Access Management (UAM)	UPDATED Updated the Prerequisite section to include a note about the use of non-Production tenants with UAM.

Authentication

Reference: Twilio-Based SMS OTP Multifactor Authentication Support	UPDATED Removed these countries from the list: • Georgia • Jordan • Kyrgyzstan • Lebanon • Namibia • Swaziland • Turkish Republic of Northern Cyprus • Uzbekistan

Data Privacy

Reference: Purgeable Data Types	UPDATED Added these sections: • External Learning Assessor • External Learning Instructor • Extended Enterprise Learner

February 7, 2025

Authentication

Concept: Proxy Sessions	UPDATED Removed Proxy Access on Mobile Devices section.

Configurable Security

Edit Business Process Security Policies	UPDATED Updated the first two steps on how to access business process security policies.

Security for Integrations

FAQ: Encryption, Certificates, and Ciphers for Integrations	UPDATED Added a note that lists cipher suites that Workday no longer supports for inbound integrations.

January 24, 2025

Configurable Security

Example: Set Up Access Constraint Rules for Recruiters	NEW Illustrates how to set up access constraint rules for recruiters who are both the applicant and recruiter for a job requisition.
Edit Domain Security Policies	UPDATED Added a step and in-line example illustrating how to edit domain security policies.

January 10, 2025

Authentication

Steps: Set Up Multifactor Authentication Using Emailed One-Time Passcode	UPDATED Added a note in the Result section stating that Workday doesn't use email templates for emailed one-time passcode multifactor authentication.

Steps: Set Up Multifactor Authentication Using SMS One-Time Passcode	UPDATED Removed the: • Active Workday Passcode Notification email template prerequisite. • Concept: Email Templates link from the Related Information section.

Data Security

Set Up Workday Bring Your Own Key (BYOK) For Amazon Web Services (AWS)	UPDATED Moved information about opening a support case from Step 3 to the Prerequisites section, and changed Germany to Frankfurt in the table in Step 1.

December 13, 2024

Accounts

Steps: Set Up Unified Access Management (UAM)	UPDATED Updated the Prerequisite section to include a link to steps for enabling SAML SSO for synced users.

Configurable Security

Reference: Workday-Delivered Security Groups	UPDATED Clarified the Implementers description to specify that WCL implementers are exempt from automatic deprovisioning.
Create Proxy Access Restriction Sets	UPDATED Added a section on what users need to do once a restriction set is created.

Data Privacy

Concept: Masking Sensitive Data	UPDATED Added the second bulleted item in the additional access restrictions list at the end of the topic.
Enable or Disable Data Masking	UPDATED Added the Enable Data Masking option to the table in Step 2.

	Removed information from the Result section that's included in the the Concept: Masking Sensitive Data topic.
Steps: Purge Person Privacy Data	**UPDATED** Added: • A note to Step 1. • Information about the Purge Summary Report to the Next Steps section.
Reference: Purgeable Data Types	**UPDATED** Added information to the Student Documents and Student Immigration Data rows.
FAQ: Reporting on Purged Persons	**UPDATED** Clarified the answer to the second question, and changed Yes to No in the third question.
Steps: Scramble Tenant Data	**UPDATED** Changed Users to Usernames in Step 1.

November 15, 2024

Authentication

Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication	**UPDATED** Added a note to the description for the Service Provider ID option in Step 5.
Configure SAML Single Logout	**UPDATED** In the table in Step 2, added: • Service Provider ID to the description for the Enable Workday Initiated Logout option. • A new row for the Service Provider ID option.
Troubleshooting: SAML	**UPDATED** Added the SAML Single Logout (SLO) Fails With No Apparent Indication section.

Data Privacy

Reference: Purgeable Data Types	**UPDATED**

	Added a section for payroll attachments.
FAQ: Purge Person Data	UPDATED Clarified information under Why can't I Purge some data? explaining impacts on payroll.

November 1, 2024

Configurable Security

Reference: Workday-Delivered Security Groups	UPDATED Updated the Implementers description with information on the automatic deprovisioning of inactive implementer accounts.

Security for Integrations

FAQ: Encryption, Certificates, and Ciphers for Integrations	UPDATED Added SFTP Public Key and Server Host Key algorthims.

October 4, 2024

Accounts

Steps: Set Up Unified Access Management (UAM)	UPDATED Updated the Prerequisite section to include more information on requesting access to UAM.

Data Privacy

Reference: Purgeable Data Types	UPDATED Added information to the Previous System History - Job History, Compensation History, Worker Previous System History row.

September 20, 2024

Accounts

Steps: Set Up Unified Access Management (UAM)	NEW

	How to set up: • Permission set migration. • Action Groups. • Authorization Policies. • User groups. • ISU users.
Migrate Permission Sets and User Assignments from Adaptive Planning	NEW How to enable UAM and migrate permission sets from Adaptive Planning.
Create Action Groups	NEW How to create, edit, and view action groups.
Create Authorization Policies	NEW How to create and edit authorization policies.
Set Up Unified Access Management (UAM) User Integration	NEW How to add ISU users to UAM.
Sync User Groups with Adaptive Planning	NEW How to sync user groups with Adaptive Planning.
Concept: Unified Access Management (UAM)	NEW Describes the concept of action groups, user groups, authorization policies, and reporting for Unified Access Management.

Authentication

Concept: Authentication Policy Best Practices	UPDATED Updated the Multifactor Authentication section to recommend configuring MFA one-time passcodes for WCL-enabled users.
Concept: Authentication Policies	UPDATED Updated the Prerequisite section to include information on the enablement of multifactor, one-time passcodes for WCL-enabled users.

Configurable Security

FAQ: Configurable Security	UPDATED Replaced a reference to the now-deprecated Inbox with My Tasks.
Steps: Change User-Based Security Group Assignments for a User	UPDATED Revised the Prerequisite section to only include information on how to disable existing non-workflow-enabled user-based security group assignment tasks.
Steps: Change Membership for a User-Based Security Group	NEW How to set up and use a new workflow-enabled initiating action to update user-based security group membership.
Concept: Constrained Proxy	UPDATED Replaced a reference to the now-deprecated Inbox with My Tasks.

Data Privacy

Setup Considerations: Data Purging	UPDATED • Under Limitations, added limitations related to purging Pre-Hire data. • Under Questions to Consider, added that you can purge attachments on multiple financial entities.
Steps: Purge Person Privacy Data	UPDATED Modified the description for the Select All check box in Step 5.
Steps: Schedule Privacy Purge Operations	UPDATED Modified the description for the Select All check box in Step 7.
Reference: Purgeable Data Types	UPDATED Added a: • Financial Attachments section. • Pre-Hire section.

Budgets

January 10, 2025

Budgets and Plans

Steps: Create a Pooled Budget	UPDATED How to set up pooled budgets.

December 13, 2024

Spend Control

Set Control Options for Spend Plans	UPDATED Added information on the Allow Credit Transactions to Pass option.

September 20, 2024

Budgets and Plans

Steps: Set Up Revenue Driven Budget Rules	UPDATED Added an optional step on how to set up floors and ceilings for revenue driven budget rules.
Steps: Set Up Floors and Ceilings for Revenue Driven Budgets	NEW How to set up Floors and Ceilings for revenue driven budget rules.

Education and Government

March 14, 2025

Grants Management

Setup Considerations: Award Costs Processing	UPDATED Updated the last question to be about multicompany awards in general and not about single legal entity, which is no longer mandated in multicompany awards. Also clarified that in multicompany awards, the ACP rule Workday uses is for the company associated with the award line for the grant.
Set Up Award Costs Processing Rules	UPDATED On the row for Ignore Award Line Dates for Award Costs, removed paragraph about not being able to select ACP rules in individual affiliates for single legal entity companies; the limitation no longer exists.
Steps: Set Up Multicompany Awards	UPDATED Removed information about single legal entity, and added information about award line company selection.
Create Awards	UPDATED In Step 3: • Added descriptions for the Copy Line and Copy Line and Copy Grant options. • Updated the Company description to remove the single legal entity requirement for affiliate companies in a multicompany award.
Create Award Schedules	UPDATED Inserted steps 4 and 6 to clarify the flow of the task.
Example: Create Awards with Cost Reimbursable Lines	UPDATED In Step 2, clarified the steps to create the award schedule.
Create Task Lists to Manage Award Tasks	UPDATED For clarity: • Broke down step 2 into multiple steps.

	• Added step 5.

U.S. Federal Government

Steps: Set Up Personnel Action Request (PAR)	**UPDATED** Added "Configure Personnel Action Request Blocks to show empty" row to Step 2.
Steps: Configure the Personnel Action Request Business Process	**UPDATED** Added "Add Job" and "End Job" to list of BP under Step 2.

February 21, 2025

Grants Management

Create Awards	**UPDATED** In Step 3, added a new row for Award Line Salary Cap.
Steps: Set Up Effort Certification	**UPDATED** Added step 10 for setting up payroll costing suballocation and effort certification for salary over the cap.
Create Effort Certification	**UPDATED** In step 4, added information about salary over the cap effort certification on the Details and Summary tabs.
Reference: Effort Certification Reporting	**UPDATED** On the row for Effort Certification Status Report, updated the example of allowed report to Effort Certification for Composite View with Effort Grant.

February 7, 2025

U.S. Federal Government

Steps: Set Up OPM Connector: EHRI	**NEW** How to set up the OPM Connector:EHRI.
Concept: OPM Connector: EHRI	**NEW**

	Describes the concept of OPM Connector: EHRI in Workday.
Reference: OPM Connector: EHRI Status Integration Fields	NEW Provides additional information about the OPM Connector: EHRI Status integration fields.
Reference: OPM Connector: EHRI Dynamics Integration Fields	NEW Provides additional information about the OPM Connector: EHRI Dynamics integration fields.

January 10, 2025

Grants Management

Create Grants	UPDATED In the table, on the row for Salary Cap for Grant, clarified that in order to use salary caps on grants, you must specify the salary caps on the award lines and not on the grants.
Steps: Map Spend Categories or Pay Components to Sponsor Expenditure Categories	UPDATED On the row for Spend Category/Hierarchy/Pay Component Group, emphasized the need to map pay component groups to a salary/wages or fringe-related object class.
Recertify Effort Certification	UPDATED In Step 4, list the various recertify reason codes and how they're derived.

December 27, 2024

Grants Management

Set Up Grants Management Configurations	UPDATED In the Context section, clarified that valid and default line types only apply to award creations and not award proposal creations.

December 13, 2024

U.S. Federal Government

Steps: Set Up Veteran's Preference for Recruiting	UPDATED Removed reference to Federal jobs.
Steps: Configure the Personnel Action Request Business Process	UPDATED Added sentence about cancelling in progress PAR at the end of the results section.

November 15, 2024

Education and Government	UPDATED Added additional links to help readers use our documentation.

Grants Management

Steps: Create and Assign Eligible Investigators	UPDATED In the Context section, clarified that you can only create eligible investigator for certain person types.
Concept: Eligible Investigators	UPDATED In the Context section, clarified that you can only assign eligible investigators to awards, grants, and grant hierarchies.

November 1, 2024

Grants Management

Steps: Create Invoices for Cost Reimbursable Award Transactions	UPDATED On Step 3, added a note to clarify that the First Day of This Year prompt means January 1 of the current calendar year.
Steps: Set Up Payroll Costing Suballocation and Effort Certification for Salary Over the Cap	NEW How to set up salary over the cap payroll costing suballocation and effort certification type, certify efforts on salary over the cap, and understand the effort certification report.

October 18, 2024

Grants Management

Recertify Effort Certification	UPDATED In the Context section, list the payroll change events that could affect recertification assessments. Also added a note to describe how recertify handles pay component group changes.

U.S. Federal Government

Set Up a Federal Service Center and Tie It to Pay Groups	UPDATED We update the Context section to remove an item irrelevant to the topic.

October 4, 2024

Grants Management

Reference: Facilities and Administration Spend Transactions	UPDATED In the introduction, clarified that Workday generates operational journals, and not accounting journals.

U.S. Federal Government

Steps: Set Up Veteran's Preference for Recruiting	NEW How to set up veteran's preference for Recruiting.
Example: Create a Custom Job Application Adjudication Grid	NEW Illustrates how to configure a custom job application adjudication grid for the Adjudicate Active Candidate Information report.

September 20, 2024

Grants Management

Set Up Award Costs Processing Rules	UPDATED

	In step 2, added that you can make cost reimbursable expenses that are pending award line date review billable when you enable billing outside award line dates.
Steps: Set Up Awards	**UPDATED** Added an optional step 20 to create eligible investigators if you want award and grant role assignments to persist through worker position and organization changes.
Steps: Set Up Awards	**UPDATED** In Step 6, added that you can enable billing sponsors outside award line dates for companies.
Steps: Manage Awards	**UPDATED** Removed the step to set up award schedules as that should be part of award setup. Added a step to assign roles on awards and when to use eligible investigators.
Set Up Grants Management Configurations	**UPDATED** • Renamed the topic from Set Up Line Types in Grants Management Configurations. • Added information about billing sponsors outside award line dates.
Steps: Create and Assign Eligible Investigators	**UPDATED** In Step 2, added that you can do multiple role assignments for eligible investigators by using the Assign Roles web service with reference ID from the Find Eligible Investigators report.
Concept: Eligible Investigators	**UPDATED** In the Reports section, added that we now return the reference ID that you can use when you assign roles via web services.
Steps: Manage Award Billing and Sponsor Payments	**UPDATED** Added Step 4 to manage cost reimbursable billable transactions.
Manage Cost Reimbursable Billable Transactions	**NEW** How to make cost-reimbursable transactions that fall outside award line dates billable.

Reference: Cost Reimbursable Billing Statuses	**UPDATED** Added: • Recommendation to use the Cost Reimbursable Spend Line Billing Status report field when reporting on the status of cost-reimbursable lines. • That you can make cost reimbursable expenses that are pending award line date review billable when you enable billing outside award line dates.
Steps: Set Up Prepaid Award Lines for Automatic Consumption	**UPDATED** • In Step 2, clarified how to configure award lines for prepaid installments. • In Step 3, added recommendations on how to configure award billing schedules. • Clarified the Results section.
Process: Award Cost Reimbursable Spend to Billing	**UPDATED** In the Context section, added a link to the use case for award cost reimbursable spend to billing.
Record Letter of Credit Draw Downs	**UPDATED** • In Step 3, clarified the description for the cost-reimbursable expense option. • In Step 4, clarified that users can review total draw amounts for awards. • Added Step 5.
Configure the Effort Certification Business Process	**UPDATED** In Step 3, updated the Create Payroll Accounting Adjustments for Effort Certification row to include information on enabling retro periods on payroll accounting adjustments for effort certification.
Create Effort Certification	**UPDATED** In step 4, added a new table to describe details on each of the tabs in the effort certification composite report, including the Payroll Periods column.
Concept: Effort Certification for Payroll	**UPDATED** Updated the Effort Certification for Payroll Accounting Adjustments with Retro Periods section with information about Workday behavior when you select the **Enable Retro Period on Payroll Accounting Adjustments**setting.

U.S. Federal Government

Create Standard Forms for Benefits	UPDATED We update this topic with more configuration instructions to enhance the experience of generating U.S. federal Standard Forms.
Set Up a Federal Service Center and Tie It to Pay Groups	NEW This new topic details configuration information for U.S. federal users to populate certain fields in SF 2809 and SF2810.

Financial Management

March 14, 2025

Business Assets

FAQ: How do I stop tracking assets registered from supplier invoices?	NEW Answers frequently asked questions about asset tracking.
Troubleshooting: Asset Registration Errors	UPDATED Merged the 2 problems and clarified the steps in the solution.

Customer Accounts

Steps: Configure Customers	UPDATED Updated Step 4 to add information on invoice aging.
Set Up Customer Overview	UPDATED Updated Step 1 to add details on the separate payments options.
Configure Receivables Aging Worklets	NEW How to configure receivables aging worklets.
Set Up Customer Invoice Options for a Company	UPDATED Added customer contracts in step 2, row 2.

Create Customer Invoices	UPDATED Updated the Commodity Code section in Step 5.
Create Customer Invoice Adjustments	UPDATED Updated the Commodity Code section in Step 5.
Concept: Customer Payments	UPDATED Added information about creating an advanced custom report to view customers payment transaction history.
Steps: Create Customer Refund Payments in Settlement Runs	UPDATED Updated the Next Steps section for more information on custom reports.
Concept: Customer Refunds	UPDATED Added the Separate Refund Payments in Settlement Runs section.
Record Cash Sales	UPDATED Updated Step 4 to add information on the commodity codes.
Reference: Repeat-On Instances for Customer Document Business Process Events	NEW Provides additional information on valid repeat-on instances for customer document business process events.
Troubleshooting: Unable to Email Customer Documents	UPDATED Updated to add information on how to troubleshoot when there are invalid repeat-on instances.
Set Up Workflow Notifications for Customer Invoice Emails	UPDATED Updated Step 4 to add information on a new Repeat On Conditions and Rules section.
Steps: Create Customer Statement Print Layout	UPDATED Updated Step 1 to add information on custom business forms.
Set Up Workflow Notifications for Customer Statement Emails	NEW How to set up workflow notifications for customer statement emails.

Set Up Workflow Notifications for Dunning Letter Emails	NEW How to set up workflow notifications for dunning letter emails.

Expenses

Setup Considerations: Payment Elections	UPDATED In Requirements, clarified that to add payment elections or process payroll for a worker, you must add them to a pay group.
Set Up Custom Help Text for Payment Elections	NEW How to set up custom help text for payment elections tasks and reports.
Reference: Payment Elections Tasks, Reports, and Groups for Help Text Configuration	NEW Provides additional information on payment elections tasks and reports for which you can configure custom help text.

Financial Accounting

Set Up Account Sets	UPDATED Updated to note that you can't retire ledger accounts that are in use on certain allocation pools or plans.
FAQ: Can I retire ledger accounts?	UPDATED Updated to note that you can't retire ledger accounts that are in use on certain allocation pools or plans.
Concept: Currency in Accounting Journals	UPDATED Removed the web service only limitation from submitting journals that contain multiple transaction currencies with multiple line companies with different ledger currencies.
Steps: Set Up Close and Consolidation Hub	UPDATED Updated to include information about replacing the default cards on the Overview page of the hub.
Steps: Replace Default Overview Cards on the Close and Consolidation Hub with Custom Reports	NEW How to replace the default data visualization cards on Overview page of the Close and Consolidation hub with insights from your own custom reports.

Reference: Close and Consolidation Hub Sections	UPDATED Updated to include information about replacing the default cards on the Overview page of the hub.
Reference: Close and Consolidation Hub Cards	UPDATED Updated to include information about replacing the default cards on the Overview page of the hub.
Reference: Workday-Delivered Reports for Financial Close	UPDATED Updated to include information about new functionality on the View Intercompany Reconciliation report.

Lease Accounting

Setup Considerations: Lease Accounting	UPDATED In the Limitations section, added worktag change as a supported amendment type.
Create Worktag Change Amendments	NEW How to create a worktag change lease amendment.
Concept: Lease Accounting	UPDATED In the Amendments section, added the new **Worktag Change** amendment type.

Project Billing

Manage Project Billing Transactions	UPDATED Added information about transferring time blocks in closed periods.
Transfer Project Transactions	UPDATED Added information about time blocks in closed periods.
Concept: Project Transaction Transfers	UPDATED Added section about time blocks in closed periods.
Setup Considerations: Percent Complete Revenue Recognition	UPDATED Added support for phase and task granularity.

Create Percent Complete Configurations for Projects	UPDATED Added phase and task granularity.
Review Percent Complete Calculations for Revenue Recognition	UPDATED Added rows for Base Currency and Contract Currency.

Revenue

Create Sales Items	UPDATED Added a row for the Quotable option.
Create Customer Contracts	UPDATED Added the Bill-From Address, Ship-From Address, and Commodity Code rows to the tables.
Setup Considerations: Multiple-Element Revenue Allocation	UPDATED Added these new web services in the Integrations section: • Get Multiple-Element Revenue Allocations • Put Multiple-Element Revenue Allocation
Steps: Create Multiple-Element Revenue Allocation	UPDATED Added a bullet in Step 4 to provide information on the Put Multiple-Element Revenue Allocation web service.
Create Customer Invoice Proposals	UPDATED New topic. Describe which Workday tasks to use to create customer invoice proposals, and mention the Customer Invoice Proposal Workspace for managing proposals.

Settlement

Setup Considerations: Settlement	UPDATED Updated the check box name in Customer Accounts section in Connections and Touchpoints, and added new bank routing rule web services to Integrations.
Setup Considerations: Settlement Run Filters	UPDATED Updated the Security and Reporting sections to include new domains, reports, and report data source filters.

Steps: Set Up Settlement Run Advanced Filters	UPDATED Updated to include new reports that you can use to create a settlement run filter.
Reference: Settlement Run Items and Payments	UPDATED Updated the Customer Invoices section.

Supplier Accounts

Steps: Set Up Prepaid Supplier Spend	UPDATED Updated Context section in the topic to discuss manual and receipt amortization.
Steps: Set Up Supplier Invoices	UPDATED Added an optional Step 6 to configure optional fields.

March 7, 2025

Financial Accounting

Setup Considerations: Allocation Plans	NEW Information to consider before setting up Allocation Pools.
Create Allocation Plans	NEW How to configure allocation plans.
Process Allocation Plans	NEW How to configure processing an allocation plan.

February 21, 2025

Business Assets

Steps: Track Assets	UPDATED For clarity: • Moved information to Transfer Assets. • Clarified that we move the net book value in steps 5 and 7.

Transfer Assets	NEW How to transfer assets within a company.

Common Financial Components

Steps: Set Up On-Behalf Intercompany Transactions	UPDATED Added a link to the use case library topic.

Financial Accounting

Concept: Currency Translation	UPDATED Updated to provide more detail on how currency translation is performed.
Concept: Differences Between OfficeConnect and Report Writer	UPDATED Updated Rounding and Significant Digits with Currency Translation section with additional instructions (bullet 2) on how to change default formatting for OfficeConnect data.

February 7, 2025

Business Assets

Steps: Track Assets	UPDATED Moved information from Steps: Dispose Assets.
Register Composite Assets	UPDATED Moved information from Steps: Dispose Assets.
Steps: Set Up Asset Accounting	UPDATED Added a step to configure trackable line reviews.
Steps: Set Up Asset Accounting for Multiple Books	UPDATED For clarity: • Moved steps to create book codes and books to the Prerequisites section. • Moved information on adding assets to asset books to Steps: Set Up Asset Accounting.

	• Moved steps on comparing before and after reports to the Next Steps section.
Dispose of Assets	UPDATED For clarity: • Renamed the topic from Steps: Dispose Assets. • Added that you need to select assets before you can enter a cost or percentage to dispose. • Moved information from steps to the Context section. • Moved information to the Register Composite Assets and Steps: Track Assets topics.
Steps: Load Assets to New Workday Implementations	NEW How to load assets into new Workday implementations.
Concept: Strategies for Populating New Company Asset Books on Existing Assets	UPDATED Moved content to Steps: Set Up Asset Accounting.
Example Steps: Migrate Assets to a Secondary Asset Book	UPDATED Renamed from Example: Migrate Assets to a Secondary Asset Book.
Review Trackable Lines for Assets	UPDATED In the Context section, added that Workday creates tasks in My Tasks when you enable the review of trackable lines and complete supplier invoice or receipt business processes.
Concept: Trackable Line Reviews	NEW Describes the concept of trackable lines reviews in Workday.

Customer Accounts

Steps: Set Up Machine Learning for Customer Payment Matching	UPDATED Clarified sentence related to the Edit Tenant Setup - Machine Learning task.
Steps: Set Up Machine Learning Recommendations for Customer Overpayments	UPDATED Clarified sentence related to the Edit Tenant Setup - Machine Learning task.
FAQ: How can I populate balancing worktags on write-off lines?	NEW

	Answers a frequently asked question about balancing worktags in write-offs.
Troubleshooting: Unable to Print Customer Documents	NEW How to diagnose and resolve errors in customer document print.
Include Messages in Customer Statement Documents	UPDATED Updated the topic to clarify on the customer document type.

Financial Accounting

Steps: Set Up Journal Insights	UPDATED Updated Step 2 with new wording.
Concept: Financial Reporting	UPDATED Added links to new topics for 2025.06 release.

Financial Transaction Taxes

Setup Considerations: Combined Federal/State Filing Program	UPDATED Added a recommendation to configure withholding tax rates with a realization point of invoice.

January 24, 2025

Customer Accounts

Create Customer Payment Rule Set	UPDATED Added information on remit-from customer mapping.
Schedule Customer Payment from Bank Statement Line	UPDATED Added information on excluding unreconciled bank statement lines with canceled payments and deposits.

Expenses

Setup Considerations: Payment Elections	UPDATED

	Added a question to consider regarding customizing help text for payment elections tasks and reports.
Steps: Set Up Payment Elections	UPDATED Added an optional step 10 for customizing help text on payment elections tasks and reports.

January 10, 2025

Budgets

Steps: Create a Pooled Budget	UPDATED How to set up pooled budgets.

Customer Accounts

Steps: Create Direct Debit Mandates for Direct Debit Customer Payments	UPDATED Added information about electronic customer invoices in Step 6 and settlement run process in Next Steps section.

December 27, 2024

Accounting Center

Inactivate Accounting Source	UPDATED Added optional step 1 for contextual security.
Edit Accounting Center Process Configuration	UPDATED Added a new optional step 1 for contextual security.
Approve Accounting Center Batch Journals	UPDATED Added optional step 1 to contextually secure users to actions on the Accounting Center In-Line Edit Approval Event business process.
Create Accounting Center Batches from Source Systems	UPDATED Added optional step to contextually secure users to the Process: Accounting Center domain and contextually secure users to actions on the Accounting Center Summarization Event business process.

Configure Detailed Journal Additional Attributes	UPDATED Added an optional step 1 for contextual security.
Cancel Accounting Center Batches	UPDATED Added optional step 1 for contextual security.
Review Details of Batches, Stages, and Runs	UPDATED Added optional step 1 for contextual security.
Stop Accounting Center Business Process Event	UPDATED Added optional step 1 of contextually securing actions on the Accounting Center Summarization Event business processes by the constrained Roles - Source System security group.
Custom Dismiss Transactions	UPDATED Added a new optional Step 1 for contextual security
View and Resolve Errors in Error Manager	UPDATED Updated prerequisites section to include Process: Accounting Center Error Manager domain. Added an Step 1 as an optional step.
Edit Ingested Errors in Error Manager With In-Line Edits	UPDATED Added optional step to contextually secure users to the Process: Accounting Center Error Manager domain and contextually secure users to actions on the Accounting Center In-Line Edit Approval Event business process.
Publish Prism Datasets	UPDATED Added optional step to contextually secure users to the Process: Accounting Center domain and contextually secure users to actions on the Accounting Center Summarization Event. business process.

December 13, 2024

Budgets

Set Control Options for Spend Plans	UPDATED

	Added information on the Allow Credit Transactions to Pass option.

Business Assets

Adjust an Asset In Service Date	UPDATED • Expanded the Context section to provide information on when Workday populates in-service dates and when you can adjust them. • In Step 2, added information about the Current Books and Restricted to Books options. • In the Results section, clarified that Workday updates the depreciation schedule on assets. • Removed the Example section. • In the Next Steps section, clarified that you can review the Depreciation Summary and Depreciation Detail tabs of the View Business Asset report.
Reference: Asset Statuses	UPDATED Clarified that Workday assigns a status of In Service to assets from which you remove workers.

Customer Accounts

Reference: Invoicing and Receivables Reports	UPDATED Updated the retirement date of the receivables aging reports.
Setup Considerations: Interest and Late Fees	UPDATED Added a security note in the Recommendations section.
Steps: Write Off Receivables	UPDATED Updated to use the term worktag balancing in Step 2.
Steps: Print and Email Customer Invoices	UPDATED Removed the information for scheduling customer invoice print and added the Schedule Print Customer Invoices topic.
Schedule Print Customer Invoices	NEW How to schedule printing customer invoices.
Steps: Create Customer Statement Print Layout	UPDATED Added an optional step for custom report design.

Financial Accounting

Convert Active Ledger Types	UPDATED Added a new prerequisite for resolving operational journals in *Error* status.
Create Rules for Translating Ledger Accounts	UPDATED Updated to clarify that Workday translates from company currency and not transaction currency.
Concept: Currency Translation	UPDATED Updated to add clarity about how Workday translates amounts in reporting.
Concept: Financial Reporting	UPDATED Updated to add clarity about how Workday translates amounts in reporting.

Financial Transaction Taxes

Set Up Company Tax IDs for Financial Transactions	UPDATED In Step 2, expanded the Transaction Tax ID table row to provide more information on purchase orders.

Lease Accounting

Setup Considerations: Lease Accounting	UPDATED Clarified in the Limitations section that you can't create amendments for short-term operating leases.
Concept: Lease Accounting	UPDATED Clarified that you can only create amendments for operating or financial lease-type supplier contracts.

November 29, 2024

Financial Transaction Taxes

Setup Considerations: 1099 Reporting	UPDATED Added a use case for the creation of additional 1099 runs.

Steps: Process 1099 Returns	UPDATED Added steps to: • Create additional 1099 runs for missed payees. • Regenerate 1099 runs.
Create 1099 Runs	UPDATED • Added information about additional 1099 runs. • Moved information to Concept: 1099 Runs.
Create Corrected 1099 Runs	UPDATED In step 2, clarified that you can also select additional 1099 runs.
Concept: 1099 Runs	NEW Describes the concept of 1099 runs in Workday.
Concept: 1099 Work Area	UPDATED Clarified that you can view additional 1099 runs.

November 15, 2024

Customer Accounts

Steps: Set Up Direct Debit Mandate Payments	UPDATED How to set up SEPA direct debit mandate payments.
Steps: Create Direct Debit Mandates for Direct Debit Customer Payments	UPDATED Added Next Steps section and information about mandate statuses.

Financial Accounting

Steps: Set Up Fiscal Schedules and Years	UPDATED Updated the Context section with clarifications about creating 2 fiscal years for the same fiscal schedule.
Process: Procure to Pay Period Close	UPDATED

	Updated Step 13 to include an additional Payables to Supplier Reconciliation report.

Optimize Financial Management Performance

Reference: Financial Management Tenant Configuration Guidelines	UPDATED Added configuration guidelines for Project Management & Core Setup.

Settlement

Set Up Remittance Issue Event Business Process	UPDATED In Step 4, added links to additional resources on configuring custom email notifications.

November 1, 2024

Customer Accounts

Concept: Customers	UPDATED Added a section on customer statuses.
Reference: Customer Status Results	NEW Provides information on customer status results in customer accounts operations.

Expenses

Setup Considerations: Expense Items	UPDATED Renamed the domain name Expenses Segmented Setup to Set Up: Expense Item Security Segments to align with domain naming standards
Steps: Set Up Security for Expense Items	UPDATED Renamed the domain name Expenses Segmented Setup to Set Up: Expense Item Security Segments to align with domain naming standards
Example: Set Up Allowance Plan for Health and Fitness Expenses	UPDATED

	Renamed the domain name Expenses Segmented Setup to Set Up: Expense Item Security Segments to align with domain naming standards

Financial Accounting

Steps: Maintain Access to Ledger Accounts	UPDATED Renamed the domain name Ledger Account Segmented Setup to Set Up: Ledger Account Security Segments to align with domain naming standards
Concept: Cash Basis Accounting	UPDATED Clarified that Workday doesn't support on-behalf of intercompany transactions or payments for cash basis accounting.
Concept: Currency in Accounting Journals	UPDATED Clarified when you can submit journals that contain multiple transaction currencies and multiple line companies with different ledger currencies.

Lease Accounting

Steps: Set Up Security for Lease Accounting	UPDATED Renamed the domain name Supplier Contract Segmented Setup to Set Up: Supplier Contract Security Segments to align with domain naming standards

Optimize Financial Management Performance

Reference: Financial Management Tenant Configuration Guidelines	UPDATED Added configuration guidelines for Journal Sources and Mapping.

Project Billing

Transfer Project Transactions	UPDATED Added the Next Steps section to explain reporting.

Supplier Accounts

Configure Email Ingestion for Supplier Accounts	UPDATED

	Renamed the domain name Supplier Segmented Setup+TG to Set Up: Supplier Security Segments to align with domain naming standards

October 18, 2024

Customer Accounts

Reference: Invoicing and Receivables Reports	UPDATED Updated the receivables aging standard report section to add information on accounting for unapplied customer payments.
Record Customer Payments	UPDATED Added information on accounting for applied and deposited payments.
Create Customer Payment Application Rule	UPDATED Updated the Remittance Detail Match Conditions section with clarifications on the Match by Amount to Pay for Remittance Detail Matching Rule option.

Financial Accounting

Setup Considerations: Alternate Ledger Currencies	UPDATED Clarified that you must review your custom validation to evaluate for specific journals in the Requirements section.
Steps: Set Up Alternate Ledger Currency	UPDATED Added a new optional step to update existing custom validations to evaluate for a specific ledger.

Supplier Accounts

Create a Down Payment Invoice from a Supplier Invoice	UPDATED Clarified tax options.

October 4, 2024

Accounting Center

Edit Accounting Source	UPDATED Updated the topic for tax reporting on Accounting Center summary journals.
Create Manual Accounting Center Detailed Journals	UPDATED Updated topic by including an additional field of Enable Tax Detail on the header.

Customer Accounts

Create Customer Invoices	UPDATED In Step 5, clarified that Workday populates the Withholding Tax Code when you enable third-party withholding tax for the invoice company.
Create Customer Invoice Adjustments	UPDATED In Step 5, clarified that Workday populates the Withholding Tax Code when you enable third-party withholding tax for the invoice company.
Setup Considerations: Customer Collections Dashboard	UPDATED Updated operational worklet name in the Recommendations section.

Financial Accounting

Group Allocation Definitions	UPDATED Updated to add more detail about the Time Frame prompt.

Revenue

Steps: Create Credit and Rebill Customer Invoices for Customer Contracts	NEW Clarified where the two options appear, in step 3.

Supplier Accounts

Create Supplier Invoices	UPDATED • In Step 3, added that you can't enter default withholding tax codes when you enable third-party withholding tax for the invoice company. • Moved information from Step 9 to Step 3.

September 20, 2024

Accounting Center

Setup Considerations: Accounting Center	UPDATED Updated these sections for Detailed Accounting enhancements: • Questions to Consider - About processing more than 300,000 records per transaction in Detailed Accounting. • Recommendations - Updated Ingestion Source for Accounting Source row and Enriching Data row.
Create Accounting Source	UPDATED Added a new optional Step 1 for contextual security and added a new row of Source System for step 4.

Budgets

Steps: Set Up Revenue Driven Budget Rules	UPDATED Added an optional step on how to set up floors and ceilings for revenue driven budget rules.
Steps: Set Up Floors and Ceilings for Revenue Driven Budgets	NEW How to set up Floors and Ceilings for revenue driven budget rules.

Business Assets

Reference: Depreciation Methods	UPDATED For the Term depreciation method: • Clarified that you must enter external contract start and end dates for assets that you register manually.

	• Added a recommendation to use straight-line instead for assets that you migrate from external systems and want to continue depreciating in Workday.
Concept: Leased Assets	NEW Describes the concept of leased assets in Workday.

Cash

Steps: Set Up Intelligent Prompt Recommendations for Cash Management Transactions	NEW How to configure intelligent recommended prompt values for Cash Management transactions.
Steps: Manage Ad Hoc Payments	UPDATED Added Step 4 on configuring intelligent prompt recommendations for ad hoc payments.
Steps: Set Up Miscellaneous Payment Requests	UPDATED Added Step 10 on configuring intelligent prompt recommendations for miscellaneous payment requests.
Steps: Set Up Ad Hoc Bank Transactions	UPDATED Added Step 1 on configuring intelligent prompt recommendations for ad hoc bank transactions.

Customer Accounts

Setup Considerations: Customer Accounts	UPDATED Added the new entity activity code and code type web services in the Integrations section.
Set Up Customer Contacts and Addresses	UPDATED Added information on customer contact types in Step 2.
Set Up Customer Invoice Options for a Company	UPDATED Added an option to display bill-from and ship-from addresses on a customer invoice.
Create Customer Invoices	UPDATED Added information on bill-from and ship-from address options.

Create Customer Invoice Adjustments	UPDATED Added information on bill-from and ship-from address options.
Record Customer Payments	UPDATED Added information on zero-amount payments.
Steps: Apply Customer Payments	UPDATED Added information on zero-amount payments.
Reapply an Unapplied Customer Payment	UPDATED Added information on editing unapplied customer payments.
Concept: Customer Payments	UPDATED Added the Zero-Amount Payments section.
FAQ: Customer Payments	UPDATED Added a question about zero-amount customer payments.
Create Customer Payment Rule Set	UPDATED Added information on invoice lookup prefixes.
Schedule Customer Payment from Bank Statement Line	UPDATED Updated the Results section to add information on items populated on remittance advice.
Steps: Create a Customer Refund	UPDATED Updated Step 2 to add information on the payee remit-to address.

Expenses

Setup Considerations: Payment Elections	UPDATED Updated the Business Processes section to include Hire.
Steps: Set Up Payment Elections	UPDATED Updated step 8 to include the Hire business process.
Create Expense Items	UPDATED

	Added information on the Hide Itemization option.
Customize Expenses Hub Card	NEW How to customize Expenses Hub card.

Financial Accounting

Set Up Company Contact Information	UPDATED Added Payroll Tax Form as an option to the Use For field on the Address description. Under the Prerequisites section, added a link to the Steps: Set Up Security Permissions topic.
Setup Considerations: Alternate Ledger Currencies	UPDATED In the requirements section, included a requirement to update custom validations to exclude alternate ledger journals.
Reference: Account Posting Rules	UPDATED Added a Projects section and included the common use cases and accounting information.
Steps: Set Up Cash Basis Accounting	NEW How to set up cash basis accounting.
Create Cash Basis Accounting	NEW How to set create cash basis accounting.
Concept: Cash Basis Accounting	NEW Describes the concept of cash basis accounting in Workday.
Example: Route Journals to Different Approvers Based on Ledger Accounts	NEW Illustrates how to route journals to different approvers using the Accounting Journal Event business process.
Concept: Supplemental Schedules	UPDATED Describes Supplemental Schedules.
Concept: Workday Worksheets	UPDATED Describes Workday Worksheets.

Concept: Custom Validations for Supplemental Data	UPDATED Describes custom validations for Supplemental Data.
Create Supplemental Data Templates	UPDATED Describes how to create supplemental data template.
Create Supplemental Data Text List	UPDATED Describes how to create supplemental data text lists.
Maintain Supplemental Data Templates	UPDATED Describes how to maintain supplemental data templates.
Create Supplemental Data	UPDATED Describes how to create supplemental data.
Maintain Supplemental Data Translation Amounts	UPDATED Describes how to maintain supplemental data translation amounts.
Create Consolidated Supplemental Data	UPDATED How to create consolidated supplemental data.
Concept: Supplemental Data Hub	UPDATED Describes the supplemental data hub.
Create Multiple Supplemental Data Workbooks	UPDATED Describes how to create multiple supplemental data workbooks.
Create Custom Reports for Supplemental Schedules	UPDATED Describes how to create custom reports for Supplemental Schedules.
Concept: Calculated Fields in Supplemental Schedules	UPDATED Describes calculated fields in Supplemental Schedules.
Steps: Roll Forward Setup and Configuration	UPDATED Describes steps to setup and configure roll forward.

Mass Roll Forward Multiple Supplemental Data Workbooks	UPDATED Describes how to mass roll forward multiple supplemental data workbooks.
Reference: Supplemental Data Statuses	UPDATED Describes supplemental data statuses.
Setup Considerations: Consolidations and Eliminations	UPDATED Updated to include information about calculating noncontrolling interest for all owned companies.
Steps: Set Up Consolidations	UPDATED • Renamed topic from Steps: Set Up Consolidation Companies. • Updated steps for clarity and consistency.
Steps: Set Up Alternate Fiscal Year Consolidations	UPDATED Renamed topic from Steps: Create Alternate Fiscal Year Consolidations.
Set Up Company Ownership Details	UPDATED Updated the Context section to include information about reporting on noncontrolling interest using OfficeConnect.
Set Up Intercompany and Interworktag Elimination Rules	UPDATED Updated the Result section to include information on the new View Intercompany Reconciliation Report.
Example: Set Up Proportional Consolidation	UPDATED Illustrates how to set up proportional consolidation for a single company.
Steps: Set Up for Persisting Noncontrolling Interest	UPDATED Updated to include information about calculating noncontrolling interest for all owned companies.
Set Up Elimination Rules for Noncontrolling Interest	UPDATED Updated to include information about calculating noncontrolling interest for all owned companies.
Run Noncontrolling Interest	UPDATED

	Updated with: • Description of the new Consolidating Parent Company field. • Information about calculating noncontrolling interest by ownership rather than hierarchy.
Steps: Migrate from Deriving Noncontrolling Interest to Persisted Noncontrolling Interest	NEW How to migrate from deriving noncontrolling interest to persisted noncontrolling interest.
Steps: Match Intercompany Journal Lines Manually	UPDATED How to match intercompany journal lines manually.
Steps: Process Automated Transaction Matching on Journal Lines	UPDATED Updated Step 1 to rename the task from Set Up Transaction Matching to Set Up Journal Line Matching.
Unmatch Intercompany Journal Lines	UPDATED How to unmatch intercompany journal lines.
Steps: Set Up Close and Consolidation Hub	UPDATED How to set up, customize, and configure security for the Close and Consolidation Hub.
Reference: Close and Consolidation Hub Sections	UPDATED Additional information on the sections in the Close and Consolidation Hub.
Reference: Close and Consolidation Hub Cards	UPDATED Additional information on the cards that display on the Overview page of the Close and Consolidation Hub.
Define Intercompany Balancing Rules for Balancing Worktags	NEW How to configure intercompany balancing rules for balancing worktags.
Reference: Workday-Delivered Reports for Financial Close	UPDATED Updated to include information on the new View Intercompany Reconciliation report.
Concept: Differences Between OfficeConnect and Report Writer	UPDATED

	Included info and links about NCI support for 2024 R2

Financial Transaction Taxes

Steps: Set Up Address-Level Tax Information	**NEW** How to set up and maintain address-level tax information for companies, customers, and suppliers.
Concept: Automatic Assignment of Transaction Tax IDs on Invoices	**NEW** Describes the concept of how Workday assigns transaction tax IDs on invoices automatically.
Configure Transaction Tax Rules for Items	**UPDATED** • Updated the task name in Step 1 from Create Tax Rule for Worktags. • Added description of the new Tax Point Date Type Override prompt. • In Step 3, added the Worktags Tax Rule option.
Configure Transaction Tax Rules for Countries	**UPDATED** Added description of the new Default Tax Point Date Type prompt.
Configure Transaction Tax Rules for Worktags	**UPDATED** • Renamed the topic from Configure Transaction Tax Rules Using Worktags. • Updated the task name in Step 1 from Create Tax Rule for Worktags. • Added description of the new Tax Point Date Type Override prompt.
Configure Transaction Tax ID Exceptions	**UPDATED** Added a description of the new Statutory Invoice Type column.
Set Up Tax Rates for Withholding Tax	**UPDATED** Updated the topic to reflect that you can now use third-party tax service integrations for withholding tax.
Steps: Configure Withholding Tax Rules	**UPDATED** • Reordered the steps. • Added Step 9 to configure withholding tax rules for worktags.

Configure Withholding Tax Rules for Items	UPDATED In Step 3, added the Worktags Tax Rule option.
Configure Withholding Tax Rules for Worktags	NEW How to configure withholding tax rules for worktags.
Setup Considerations: 1099 Reporting	UPDATED • Added information about the 1099 Payment Details report. • Moved information about the 1099 Report to Concept: 1099 Report.
Map 1099 Categories to Spend Categories and Hierarchies	UPDATED Moved information about 1099 reports to Steps: Preview 1099 Payment Details.
Map a Tax Authority to 1099 Federal or State Withholding	UPDATED In the Next Steps section, replaced information about running the 1099 Report with information about previewing 1099 payment details.
Steps: Preview 1099 Payment Details	UPDATED • Renamed the topic from Preview 1099 Reporting. • Updated the topic to document how to preview 1099 payment details using the new task and the new reports. • Moved information about the 1099 Report to Concept: 1099 Report.
Create 1099 Adjustments	UPDATED Replaced information about the 1099 Report with information about the 1099 Payment Details report.
Print 1099 and 1096 Forms	UPDATED Replaced information about the 1099 Report with information about the 1099 Payment Details report.
Concept: 1099 Report	NEW Migrated content from Preview 1099 Reporting to this topic.
Example: Set Up a Contingent Worker as a 1099 Payee	UPDATED Replaced information about the 1099 Report with information about the 1099 Payment Details report.

Troubleshooting: 1099 Reporting Problems	UPDATED Replaced information about the 1099 Report with information about the 1099 Payment Details report.
Steps: Set Up Third-Party Tax Service Integrations	UPDATED Updated the topic to reflect that you can now use third-party tax service integrations for withholding tax.
Concept: Third-Party Tax Service Integrations	UPDATED Updated the topic to reflect that you can now use third-party tax service integrations for withholding tax.
Example: Set Up Third-Party Tax for Customer Invoices	UPDATED Clarified that the example illustrates how to enable a third-party tax provider for transaction tax but not for withholding tax.
Steps: Set Up Entity Activity Codes	NEW How to create entity activity code types and codes and assign them to your entities.
Create Entity Activity Code Types	NEW How to create entity activity code types.
Create Entity Activity Codes	NEW How to create entity activity codes.
Concept: Entity Activity Codes	NEW Describes the concept of entity activity codes in Workday.

Optimize Financial Management Performance

Reference: Financial Management Tenant Configuration Guidelines	UPDATED Clarified the configuration guideliens for Retained Earnings.

Project Billing

Steps: Manage Project Billing Transactions	UPDATED Because topics "Manage All Project Billing Transactions" and "Manage Project Billing Transactions by Transaction Source"

	are now combined, as part of the work for the Transfer Project Transactions feature, removed link to former topic.
Steps: Manage Project Billing Transactions	UPDATED Added information about setting up worklets for custom reports.
Set Up Project Billing Configurations	UPDATED Changes: • Added the Transaction Types for Adjustment option. • Included the new Transfer Project Transactions task. • Added billing options "Enable Custom Validations for Customer Invoice Proposals", and "Hide Separate Tabs in Transaction Grid".
Manage Project Billing Transactions	UPDATED Updates: • Extend mass modification of amounts to all transaction types. • Updated to mention the new Transfer Project Transactions task. • Tabs are only available in tabbed view. • Added information about exporting to Excel. • Described filtering behavior for the Billable Projects field. • Added the mass action for excluding transactions from prepayment. • Changed "Modify amount for time" to "Modify amount". • Combined the two admin guide topics "Manage All Project Billing Transactions" and "Manage Project Billing Transactions by Transaction Source" into this one topic and renamed it to "Manage Project Billing Transactions".
Transfer Project Transactions	UPDATED New topic for the new Transfer Project Transactions task.
Concept: Set Up Project Billing Configurations	UPDATED Changes: • Added the Transaction Types for Adjustment option. • Included the new Transfer Project Transactions task. • Added content for custom validations for customer invoice proposals. • Added the Hide Separate Tabs in Transaction Grid option.
Concept: Project Transaction Transfers	UPDATED

	New topic for the new Transfer Project Transactions task.

Revenue

Concept: Sales Items	UPDATED Removed content describing sales metrics.
Concept: Sales Items	UPDATED Replaced old accounting term VSOE with new term SSP.
Example: Create Professional Services Sales Items	UPDATED Replaced old accounting term VSOE with new term SSP.
Steps: Manage Billable Projects on Usage-Based Transactions	UPDATED Because topics "Manage All Project Billing Transactions" and "Manage Project Billing Transactions by Transaction Source" are now combined, as part of the work for the Transfer Project Transactions feature, removed link to former topic.
Create Customer Contracts	UPDATED Included Fixed Fee Project and Value-Based Project contract lines in the Phases and Tasks row.
Create and Edit Usage Billing Rates	UPDATED Including more detail, especially regarding snapshots of usage billing rates.
Example: Reset Usage Billing Rates	UPDATED New example topic to illustrate usage billing rates.
Example: Route a Contract Rate Sheet for Approvals	UPDATED New example topic to illustrate routing a contract rate sheet for approvals.
Concept: Customer Contracts	UPDATED Replaced outdated accounting term VSOE with new term SSP.
Example: Create Fair Value Price List for Bundled and Unbundled Sales Items	UPDATED New example topic to illustrate using fair value price lists.

Example: Create a Custom Report for Fair Value Price Lists with Sales Item Bundle Allocations	UPDATED New example topic to illustrate creating a report for fair value price lists with sales item bundle allocations.
Steps: Set Up Prepaid Billing Using Consolidated Billing Schedules	UPDATED Because topics "Manage All Project Billing Transactions" and "Manage Project Billing Transactions by Transaction Source" are now combined, as part of the work for the Transfer Project Transactions feature, removed link to former topic.
Maintain Project Invoice Summary Definitions	UPDATED New topic.
Steps: Manage Customer Invoice Proposals	UPDATED Added information about setting up worklets for custom reports, and the mass action for excluding transactions from prepayment.
Concept: Revenue Recognition	UPDATED Replaced old accounting term VSOE with new term SSP.

Settlement

Steps: Acknowledge Payments	UPDATED Added Step 4 on managing payment acknowledgement status exceptions for reconciled electronic payments.
Manage Payment Acknowledgement Status Exceptions	NEW How to view and take corrective action on payment acknowledgement status exceptions for reconciled electronic payments.
Create Manual Settlement Runs	UPDATED Updated the Dynamic Supplier Payment Date description with the new Apply Supplier Credit Adjustments to First Payment Due check box.
Schedule Automatic Settlement Runs	UPDATED Updated the Dynamic Supplier Payment Date description with the new Apply Supplier Credit Adjustments to First Payment Due check box.

Supplier Accounts

Steps: Set Up Supplier Accounts Hub	NEW How to set up the new Supplier Accounts Hub to access commonly used Supplier Accounts tasks, reports, and metrics.
Concept: Supplier Accounts Hub	NEW Describes the functionality of the new Supplier Accounts Hub.

Human Capital Management

March 14, 2025

Human Capital Management	UPDATED The Human Capital Management guide added several new and updated topics.

Absence

Setup Considerations: Absence Management	UPDATED Added the My Time Off Results by Period and Time Off Results by Period for Workers reports.
Setup Considerations: Time Off Plans	UPDATED Added: • Information about integrating with Workday Scheduling to determine working days for workers. • A consideration for accruals and the Buy Time Off feature to the **All Accruals** row in the Reporting section. • Information about **My Time Off Results by Period** and **Time Off Results by Period for Workers** reports.
Setup Considerations: Time Off	UPDATED Added 2 new standard reports: My Time Off Results by Period and Time Off Results by Period for Workers.
Steps: Remove Invalid Time Off Entries After Job Changes	NEW How to configure Workday to automatically remove approved time off entries in response to Change Job business process

	events when workers are no longer eligible for the time off or the entries are no longer valid working days for the workers.
Steps: Remove Invalid Time Off Entries After Work Schedule Assignment	NEW How to configure Workday to automatically remove approved time off entries in response to Assign Work Schedule business process events when workers are no longer eligible for the time off or the entries are no longer valid working days for the workers.
Create Time Off Plans That Track Balances	UPDATED Revised: • Step 3 to clarify why you can't use position-based time off plans with front-loaded or based-on-as-of-date accruals. • Step 12 to include a description for the **Use Scheduling Shifts** option.
Setup Considerations: Period Schedules	UPDATED In the Use Cases section, added information on the option to include holiday calendars to auto-adjust pay dates. Added question to consider on holiday calendars.
FAQ: Pause Annual Time Off Accruals for Absent Workers	UPDATED Added My Time Off Results by Period and Time Off Results by Period for Workers reports to Do pending time off events have an impact?
Example: Validate Time Off Requests Against Working Days in Workday Scheduling	NEW Illustrates how to configure Workday Absence Management to validate time off requests against working days in Workday Scheduling.
Setup Considerations: Absence Tables	UPDATED Revised the Limitation section to mention that you can't enter start and end times against absence table requests on the legacy absence and time off calendars. To use this feature, you need to set up Absence Calendar Experience.
Create Absence Tables	UPDATED Revised Steps 4-6 to describe how to configure start and end times.
Setup Considerations: Absence Balances	UPDATED

	In the Business Processes section, corrected the name of the service step in the Termination row.
Concept: Time Off Results by Period Reporting	UPDATED Describes the concept of Time Off Results by Period reporting in Workday.
Reference: Time Off Reports	UPDATED Added the My Time Off Results by Period and Time Off Results by Period for Workers reports in the Report Availability and Balance Tracking section.

Compensation

Setup Considerations: Compensation Eligibility Rules	UPDATED In Questions and Considerations, added additional detail on compensation defaulting following manual changes to Guidelines fields when eligibility rules are based on those fields.
Steps: Propose Compensation for Employees or Positions	UPDATED Added information on enabling machine learning for selected Compensation business processes and on enabling the enhanced user interface for Change Job.
FAQ: Compensation Defaulting	UPDATED Added information on enabling defaulting based on changes to guidelines on multiple business processes.
FAQ: Compensation Defaulting	UPDATED Updated information on the Enable Defaulting Based on Changes to Guidelines tenant option.
Set Up Compensation Package Analytics	UPDATED Updated information on replacing the Display Compa-Ratio and Display Position in Range fields and removing the Hide Compa-Ration and Hide Compensation Package Analytics fields.
Maintain Compensation Change Templates	UPDATED Updated information to add Propose Compensation Hire as a step on the Hire business process.

Reference: Benefits and Pay Hub	UPDATED In the Pay section, added that workers can view additional payroll data on the Benefits and Pay hub.
Reference: Benefits and Pay Hub	UPDATED In the Overview and Pay sections, added new actions that workers can take from the Benefits and Pay hub.
Steps: Set Up Minimum Wage for Hourly Plans	NEW How to set up minimum wage for hourly plans.
Steps: Set Up Mass Operations for Minimum Wage	NEW How to set up mass operations for minimum wage.
Create Hourly Plans	UPDATED Expanded the Steps section to provide more information about setting up minimum wage for compensation.
Concept: Minimum Wage in Compensation	NEW Describes the concept of minimum wage in compensation in Workday.

HCM Innovation Services

Concept: Workday Help	UPDATED Added a note for Service Center Representatives and Students accessing the Help Center.
Steps: Create Article Audiences Using Condition Rules	UPDATED Added a note to describe who can access Help articles.
Create Articles	UPDATED Updated the choice table to reflect new version history feature in the article editor.

Learning

Steps: Set Up Learner Experience	UPDATED

	Added an optional step to set up language preferences for learning recommendations.
Set Up Language Preferences for Learning Recommendations	NEW How to set up learning recommendations in preferred language.
View and Edit Learning Content	UPDATED Updated to mention that you can now use Generative AI to summarize feedback comments.
Configure Cloud Connect for Learning	NEW How to configure cloud connect for learning for content providers who are using the CCL platform to integrate with Workday Learning.
Reference: Content Providers Using the CCL Platform to Integrate With Workday Learning	NEW A reference topic with information about content Providers using the CCL platform to integrate with Workday Learning.
Troubleshooting: Configure Cloud Connect for Learning	NEW How to diagnose and resolve issues relating to the Configure Cloud Connect for Learning task.

Manager Insights Hub

Reference: Manager Insights Hub	UPDATED Added information about new buttons on the Hiring and Staffing Overview tab and the My Team tab.

Recruiting

Setup Considerations: Recruiting	UPDATED In the Questions to Consider section, added information about auto initiating offers and employment agreements.
Steps: Configure the Job Application Business Process	UPDATED Added the new Automatically Initiate check box to steps 4 and 6.
Steps: Set Up Auto-Initiate Offers and Employment Agreements	NEW

	How to set up auto-initiate offers and employment agreements.
Create External Career Sites	UPDATED Added that you can now select a non-US English option to enable candidates outside the United States enter dates in the DD/MM/YYYY and YYYY/MM/DD formats.
Setup Considerations: Job Postings	UPDATED Added that Workday now supports multi-language search for translated job postings including the Job Description and the Job Posting Title on the external career site.
Setup Considerations: Onboarding Experience	UPDATED Information about Onboarding Experience.
Set Up Onboarding Planner	UPDATED Information on how to set up the Onboarding Planner.
Steps: Set Up Workday Docs for Onboarding	UPDATED Information about setting up Workday Docs for the Onboarding business process.
Concept: Onboarding Experience	UPDATED Information about the Onboarding Experience.

Skills and Skills Cloud

Enable Skills Cloud	UPDATED Added the Manage Job Profile business process to the Populate Suggested Skills for Job Profiles row.

Staffing

Steps: Set Up Job Profile Business Process	UPDATED Added a new step for enabling skills suggestions on the Manage Job Profile business process. Added next steps about rescinding the Manage Job Profile business process.
Steps: Set Up Job Description Generation on Job Profiles	NEW How to set up job description generation on job profiles.

Create Job Profiles	UPDATED Added information about the Generate with AI button on the Job Description field.
Steps: Set Up Job Changes	UPDATED Updated to add more information on configuring optional fields.
Set Up Change Job Templates	UPDATED Updated to add information on configuring optional fields, and reflect that the enhanced user interface now displays on mobile devices when the Change Job template includes consolidated subprocesses.
FAQ: Pre-Hire Segmented Security	NEW Answers frequently asked questions about Pre-Hire segmented security.

Time Tracking

Steps: Enable Time Tracking for Mobile	UPDATED • Expanded step 4 to include the new Effective-Dated tab. • Added information about new Daily Time Exceptions capabilities to step 5.
Set Up Intelligent Prompt Recommendations for Time Entry	NEW How to set up intelligent prompt recommendations for time entry.
Reference: Time Administrator Home Worklet	NEW Provides additional information about the Time Administrator Home worklet.
Create Time Request Codes	UPDATED How to set up time request codes for time requests.
Create Time Code Groups	UPDATED Added time request codes, which are associated with time code groups, and additional examples.
Steps: Set Up Time Requests	UPDATED

	Renamed any references related to Request Overtime to Time Requests; Added security in Step 1, removed Steps 7 and 8, and replaced Step 6 with the new Create Time Request Codes topic link.
Concept: Time Requests	**UPDATED** Describes the concept of time requests in Workday.
Reference: Increments and Rounding for Time Entry	**UPDATED** Added time request codes.
FAQ: How do I exempt workers from lockout dates?	**UPDATED** Added the Allow Transfers Within Closed Time Entry Periods option that enables users to transfer project time blocks in closed time entry periods.
Steps: Create Time Entry Templates	**UPDATED** In the Next Steps section, updated the note and added: • All Time Entry Template Effective Dates to the list of reports. • Instructions on how to copy time entry templates. • Instructions on how to copy effective-dated configurations.
Set Up Time Entry Templates	**UPDATED** Added and updated steps related to effective dating or the Effective-Dated tab.
Set Up Time Clock Event Matching Options	**UPDATED** Expanded step 2 to include the new Effective-Dated tab.
Set Up Time Entry Calendars	**UPDATED** Added a new step 2 for the Noneffective-Dated tab.
Set Up Time Submission	**UPDATED** Added a new step 2 about the Noneffective-Dated tab.
Steps: Set Up Effort Certification for Time Tracking	**UPDATED** Expanded step 3 to include the new Noneffective-Dated tab.
Set Up Calendar Totals	**UPDATED** •

	• Added a new bullet to the Context in the Additional Totals section. • Added the new Effective-Dated tab to step 2. • In the Next Steps section, added a new step 2.
Set Up Time Shift Options	UPDATED Added a new step 2 for the Effective-Dated tab.
Steps: Set Up Project Time Entry	UPDATED Included the new Effective-Dated and Noneffective-Dated tabs in steps 3, 4, and 6.
Steps: Set Up Geofences for Mobile Time Entry	UPDATED Added a substep to step 4 for the new Noneffective-Dated tab.
Set Up Third-Party Scheduling	NEW How to set up third-party scheduling.
Concept: Effective Dating for Time Entry Templates	NEW Describes the concept of effective dating for time entry templates in Workday.
Example: Set Up Geofences by Scheduled Shift Location	UPDATED Added new steps for the new Effective-Dated and Noneffective-Dated tabs.
Setup Considerations: Worktags in Time Tracking	UPDATED Added a bullet to the Reports section for the All Time Entry Template Effective Dates report.
Steps: Set Up Worktags for Time Entry	UPDATED Moved Step 4 as a substep of Step 3, and renamed overtime requests to time requests in Step 6.
Steps: Set Up Worktags for Time Entry	UPDATED Added: • Security to Steps 1 and 4. • Substeps to Step 4.
Reference: Worktag Precedence in Time Entry	UPDATED Added Third-Party Scheduling Criteria section.

Steps: Set Up Workday Time Kiosk	UPDATED Added a Next Steps section.
Steps: Set Up Calculated Time Off	UPDATED Added a new step 2 for the new Effective-Dated tab.
Steps: Set Up End of Shift Time Attestations	UPDATED Expanded step 5 to include the new Noneffective-Dated tab.
Steps: Set Up Meal and Break Validations	UPDATED Expanded step 3 to include the new Noneffective-Dated tab.
Create Time Entry Validations	UPDATED In step 9, replaced time entry templates with time entry template effective dates.
Set Up Period Schedules for Time Tracking	UPDATED Added the Allow Transfers Within Closed Time Entry Periods option that enables users to transfer project time blocks in closed time entry periods.
Concept: Worker Eligibility for Time Tracking	UPDATED Added new information to the time entry template row of the table and added detail and examples to the time entry code row.
Reference: Worker Eligibility for Time Entry Methods	NEW Provides additional information about worker eligibility for different time entry methods.
Enter Time Requests for Worker	UPDATED How managers and administrators can view workers' time requests and request time on behalf of workers.
Manage Time Clock Events	UPDATED Added information about the Maintain Invalid Time Clock Events for Workers task to the Context section.
Concept: Importing Time Clock Events	UPDATED

	In the Editing and Deleting Time Clock Event Data section, added a table of reports and tasks for managing time clock events.
Concept: Daily Time Exceptions	UPDATED Added new capabilities to the introductory section and added a new Matching Logic for Checked In section.
Set Up the Edit and Approve Time Report	UPDATED Added a new step 2 about filtering.
Set Up the Edit and Approve Time Report	UPDATED In step 3, replaced the Business Process tab with Noneffective-Dated tab.
Concept: Edit and Approve Time	UPDATED Added information about using filters to refine the groups of workers to display on the report.

Worker Information

Maintain Worker Documents	UPDATED Added a Next Steps section to provide information about the Manage Certifications and Manage Education business processes.

February 21, 2025

Absence

Enable Absence Administrator Home Worklet	UPDATED • Renamed the topic from Steps: Enable Absence Administrator Home Worklet. • Corrected the security. • Streamlined the steps.
Reference: Absence Administrator Home Worklet	NEW Provides additional information about the Absence Administrator Home worklet.

Benefits

Setup Considerations: Payroll and Benefits	UPDATED Updated all topics in the Payroll Considerations section to clarify country-specific functionality.

Time Tracking

Enable Time Administrator Home Worklet	UPDATED • Renamed the topic from Steps: Enable Time Administrator Home Worklet. • Corrected the security. • Streamlined the steps.
Concept: Enter Time Business Process	UPDATED • Added an Effort Certification and a Delegation section. • Removed bullets from the Business Process Security section. • Added an example to the Business Process Security section.
Concept: Time Kiosk	UPDATED Describes the concept of the Time Kiosk in Workday.

Workday Scheduling

Steps: Mass Assign Scheduling Settings Overrides	UPDATED Updated step 1 text to include that users can also configure rule overrides.
Concept: Override Scheduling Settings	UPDATED Minor edits to mention that users can also override rules in addition to validations and Optimization Engine settings.
Reference: Scheduling Business Processes	UPDATED Updated description of Override Scheduling Settings for Worker.
Reference: Scheduling Reports	UPDATED Updated name of View Worker Scheduling Validation Settings report to View Worker Scheduling Settings.

February 7, 2025

Absence

Setup Considerations: Absence Tables	UPDATED Added a note to clarify that Workday supports absence tables on Android, iPad, and iPhone.

Benefits

Set Up Security and Endpoints for External Benefit Program Partners	UPDATED Added new web services to Step 2.
Configure the Benefits and Wellbeing Wallet	UPDATED Added a new step for selecting the Benefit Program Partner check box.
Concept: Benefit Program Cards	UPDATED Updated the first paragraph to now include personalized worker benefit information. Added a new list of sections you can display personalized worker benefit information in the Benefits and Pay hub.

Compensation

Steps: Enable Machine Learning for Compensation Benchmark Job Matching	UPDATED Updated information on the region in which Workday hosts data.

HCM Innovation Services

Steps: Set Up Knowledge Management	UPDATED Clarified sentence related to the Edit Tenant Setup - Machine Learning task.

Learning

Steps: Set Up Machine Learning for Learning Recommendations	UPDATED Clarified sentence related to the Edit Tenant Setup - Machine Learning task.

Recruiting

Steps: Set Up Candidate Skills Match	UPDATED Clarified sentence related to the Edit Tenant Setup - Machine Learning task.

Talent

Steps: Set Up Career Hub	UPDATED Clarified sentence related to the **Edit Tenant Setup - Machine Learning** task.

Time Tracking

Steps: Set Up Workday Time Kiosk	NEW How to set up the Workday Time Kiosk.
Create Integration System User for Time Kiosk	NEW How to create an integration system user for the Workday Time Kiosk.
Create Integration System Security Group for Time Kiosk	NEW How to create an integration system security group for the Workday Time Kiosk.
Set up the Workday Time Kiosk App	NEW How to set up the Workday Time Kiosk app on an iPad.
Create Minimum Rest Calculations	UPDATED Added an example to show how you can tag missed meal hours.

January 24, 2025

Benefits

Configure the Benefits and Wellbeing Wallet	UPDATED Describes how to set up the benefits and wellbeing wallet.

HCM Innovation Services

Steps: Create Article Authors	**UPDATED** Added a note emphasizing that Knowledge Management only supports unconstrained security groups.

Talent

Setup Considerations: Talent Marketplace	**UPDATED** In the Integrations section, added these new web services for flex teams: • Add Flex Team Members • Get Flex Team Members

Time Tracking

Concept: Edit and Approve Time	**UPDATED** Added a bullet to include totals in the list of things that you can't configure.

Workday Scheduling

Concept: Productivity Modal	**UPDATED** Updated Labor Cost description.

January 10, 2025

Staffing

FAQ: Change Job	**UPDATED** Added information about help text.

December 27, 2024

Learning

FAQ: Microsoft Outlook Integration with Workday Learning	**NEW** Answers frequently asked questions about Microsoft Outlook integration with Workday Learning.

December 13, 2024

Absence

Concept: Absence Calendar Experience	UPDATED Corrected the initiating action information in the table for the Request Time Off business process security policy.
Steps: Create a Time Off	UPDATED Revised the description for **Require Position on Time Off Request** to clarify the routing behavior for the approval step on the Request Time Off business process.
Reevaluate Absence Table Time Off Entries	UPDATED Added a note to clarify that the **Reevaluate Absence Table Time Off Entries** task only processes time off entries for members of the organizations that you select from the **Organizations** prompt and doesn't include entries for members of subordinate organizations.
Override Time Off Plan Balances	UPDATED Revised the: • Note in Step 2 to clarify when to use the **Maintain Accrual Expiration Overrides** task instead of the **Maintain Time Off Plan Override Balances** task. • Descriptions in Step 3 to explain how eligibility determines the period start dates that Workday displays in the **Override Balance Date** prompt.

Benefits

Create Benefit Eligibility Rules	UPDATED Updated the Next Steps section to include more information about linking benefit eligibility rules.
Configure Benefit Program Cards	UPDATED Updated the description for the Benefit Coverage Type field in step 3.
Create Enrollment Event Rules	UPDATED Added information about changes from a benefit event that update the Coverage Begin Date field.

Compensation

Complete Severance Package Assignments	UPDATED We update the Severance Response Due option in Step 2.

HCM Innovation Services

Create Articles	UPDATED Updated the choice table to include recommendations for using the Location field for certain use cases.
Concept: Knowledge Management	UPDATED Updated the Article Metrics and Reporting section to include more information about the article view and helpfulness metrics.

Learning

FAQ: Attendance Synchronization for Virtual Classroom Integration with Microsoft Teams and Zoom	UPDATED Answers frequently asked questions about attendance synchronization for virtual classroom integration with Zoom.

Staffing

Freeze and Unfreeze Positions	UPDATED Added more details to the context around what happens when you freeze a position.
Concept: Hire Employee Initiating Actions	UPDATED Updated information on initiating actions for enhanced Pre-Hire Search.
FAQ: Change Job	UPDATED Added frequently asked questions for the enhanced user interface.

Time Tracking

FAQ: Time Tracking on Mobile	UPDATED • Added a question about restricting mobile time entry to subsets of workers.

	• Replaced the answer to the question about disabling Enter My Time on mobile.
Steps: Set Up Time Entry	UPDATED Added an optional step 7.
Create Time Entry Codes	UPDATED Added: • Information about selecting and defining units to step 3. • Information about sort priority to step 4. • A table with example increments to step 5.
Set Up Time Submission	UPDATED Added a row for Route Time Approval by Worktags to the table in step 2.
Reference: Time Tracking and Payroll Worktags	UPDATED Added information on including worktags in payroll journal entries.
Steps: Set Up End of Shift Time Attestations	UPDATED Added information on creating penalty time blocks to the Next Steps section.
Concept: Time Entry Validations	UPDATED Corrected the last 2 sentences in the Restricting Validations to Certain Workers section.
Set Up Period Schedules for Time Tracking	UPDATED In the Next Steps section, added a bullet about using the Generate Period Schedule Periods task to extend period schedules.
Reference: Time Tracking Eligibility Reports	UPDATED Added information about the View Worker Time Eligibility by Organization report.
Reference: Time Entry Options	UPDATED Added detail to the descriptions of: • Auto-fill from Prior Week • Enter Time

	• Enter Time by Week • Enter Time by Type
Set Up Scheduled vs. Actuals Reporting	UPDATED Added an example section explaining how to configure the report to exclude breaks from actual hours.
Run Custom Time Tracking Reports with Data Source Filters	NEW How to set up data source filters for custom Time Tracking reports.
Set Up the Edit and Approve Time Report	UPDATED Removed the third row from the table in step 1.
Concept: Edit and Approve Time	UPDATED Added a recommendation to use Edit and Approve Time with groups of 50 workers or less.

November 29, 2024

Recruiting

Steps: Set Up Email Notifications for Candidates Conversational Messaging	UPDATED Added clarification that the notification type Candidate SMS Messages is for two-way messaging notifications delivered through email.

Staffing

Create Job Families	UPDATED Added optional steps 6 and 7 detailing Occupational Series for federal enhancements.

November 15, 2024

Benefits

Assign Benefit Credits to a Benefit Group	UPDATED Updated the benefit credit metrics displayed when you select the Enable Remaining Benefit Credits check box.

HCM Innovation Services

Summarize Articles with AI	UPDATED Added a note describing how to disable AI article summarization.
Translate Articles with AI	UPDATED Added a note describing how to disable AI article translation

Learning

Troubleshooting: Microsoft Outlook and Google Calendar for Learning	UPDATED How to resolve when the Learning Calendar Integration Status report doesn't display number of invites ran and sent in the past 24 hours.

Recruiting

Concept: Job Posting End Date and Time Left to Apply	UPDATED Added that you can now Opt-Out of displaying the Job Posting End Date and Time Left to Apply on Job Postings.

Workday Scheduling

Steps: Set Up Schedule View for Managers	UPDATED Updated Change View filters list and fixed spacing issues on uicontrol element.

November 1, 2024

Absence

Setup Considerations: Absence Management	UPDATED Renamed the domain name Time Off Segmented Setup and Leave Type Segmented Setup to Access Time Off (Segmented) and Access Leave Type (Segmented), respectively, to align with domain naming standards
Steps: Set Up the Absence Calendar Experience	UPDATED

	Renamed the domain name Leave Type Segmented Setup to Access Leave Type (Segmented) to align with domain naming standards
Steps: Set Up the Absence Calendar Experience	**UPDATED** Added a note about editing the legacy *Absence Calendar* business process to remove security from its initiating actions as you're ready to uptake the New Absence Calendar Experience.
Steps: Set Up the Absence Calendar	**UPDATED** Renamed the domain name Leave Type Segmented Setup to Access Leave Type (Segmented) to align with domain naming standards
Steps: Set Up Segmented Security for Time Off	**UPDATED** Renamed the domain name Time Off Segmented Setup to Access Time Off (Segmented) to align with domain naming standards
Concept: Accrual Expiration	**UPDATED** Updated limitations section.
Example: Set Up Segmented Security for Time Off	**UPDATED** Renamed the domain name Time Off Segmented Setup to Access Time Off (Segmented) to align with domain naming standards
Steps: Set Up Sell Time Off	**UPDATED** Renamed the domain name Time Off Segmented Setup to Access Time Off (Segmented) to align with domain naming standards
Setup Considerations: Accrual Adjustments and Overrides	**UPDATED** Explained that you can't use front-loaded accruals or based on as of date accruals for position-based time off plans.
Steps: Set Up Segmented Security for Leave Types	**UPDATED** Renamed the domain name Leave Type Segmented Setup to Access Leave Type (Segmented) to align with domain naming standards

Benefits

Example: Custom Validations to Prevent Multiple Spouses	UPDATED Updated the example to specifically prevent workers from enrolling more than one spouse or domestic partner in a benefit plan.
Manage Dependents and Beneficiaries	UPDATED Add security domains for spousal surcharges to prerequisites.

Compensation

Restrict Viewing of Funded and Non-Funded Plan Assignments	UPDATED Renamed the domain name Compensation Segmented Setup to Set Up: Compensation Security Segments to align with domain naming standards
Set Up Segmented Security by Compensation Plans	UPDATED Renamed the domain name Compensation Segmented Setup to Set Up: Compensation Security Segments to align with domain naming standards

Learning

Steps: Maintain Access to Learning Content	UPDATED Renamed the domain name Learning Segment Setup to Set Up: Learning Security Segments to align with domain naming standards
Reference: Security Domains for Learning	UPDATED Renamed the domain name Learning Segment Setup to Set Up: Learning Security Segments to align with domain naming standards
Steps: Set Up Learning Paths	UPDATED Removed the step to opt in to Learnin Paths in the Maintain Feature Opt-Ins report, as it's no longer needed.
Example: Create Training Activity Lessons	UPDATED Added an example topic to explain how to create a training activity lesson.

Recruiting

Steps: Set Up Segmented Security for Recruiting Stages	UPDATED Renamed the domain name Segmented Setup to Set Up: Security Segments to align with domain naming standards
Steps: Restrict Access to a Candidate's Other Job Applications	UPDATED Renamed the domain name Segmented Setup to Set Up: Security Segments to align with domain naming standards
Steps: Configure Segmented Security for Assessment Test Results	UPDATED Renamed the domain name Recruiting Assessment Category Segment Setup to Set Up: Recruiting Assessment Category Security Segments to align with domain naming standards

Staffing

FAQ: Change Job	NEW Frequently asked question for job changes.
Setup Considerations: Ad Hoc Worker Communications	UPDATED Added section about AI to questions to consider and added a bullet about AI to recommendations.
Steps: Set Up Ad Hoc Worker Communications	UPDATED Added optional step 5 about AI.
Concept: Email and Notification Templates in Ad Hoc Worker Communications	UPDATED Added info about AI and a link to the Concept topic.
Concept: Ad Hoc Worker Communications with AI Text Editor	NEW Information about Ad Hoc Worker Communications with AI Text Editor.
Set Up AI Text Editor	NEW Information about setting up the AI Text Editor for Ad Hoc Worker Communications.

Workday Scheduling

Steps: Set Up Schedule View for Managers	UPDATED Explained how you can choose to budget by cost, or by hours.

Worker Information

Setup Considerations: Personal Information by Country	UPDATED Renamed the domain name Personal Information Country Segmented Setup to Set Up: Personal Information Country Security Segments to align with domain naming standards

October 18, 2024

Benefits

Send Open Enrollment Reminders to Employees	UPDATED • Added security to prerequisites sections. • Updated the steps to be consistent with the user interface.

HCM Innovation Services

Steps: Set Up Knowledge Management	UPDATED Updated step 3 to make opting in to the People Experience: User Experience Machine Learning service optional.

Recruiting

Steps: Set Up Internal Job Alerts	UPDATED • In Step 6, replaced the Create Custom Reports topic with the Copy Reports topic. • In Step 7, replaced the configuration for the Talent and Performance dashboard with the setup for Jobs Hub.

Talent

Reference: Career Hub Security	UPDATED Updated security domain names.
Setup Considerations: Talent Marketplace	UPDATED

	Updated security domain names.
Steps: Set Up Security for Talent Marketplace	UPDATED Updated security domain names.
Steps: Set Up Flex Teams	UPDATED Updated security domain names.
Create Flex Teams	UPDATED Updated security domain names.

Time Tracking

Create Consecutive Day Calculations	UPDATED In step 5, added information on which tags to include, add, and remove when you enable **Allow Rolling Consecutive Day**.
Create Standard Overtime Calculations	UPDATED In step 7, added a clearer example to illustrate Tag Time With Worktags First.
Set Up Time Block Create Calculations	UPDATED In the **Result** section, added information on using **Sum Based on Calculated Quantity** on the time entry template to include the calculated time blocks in daily totals.
Steps: Set Up Machine Learning for Time Anomalies	UPDATED • In step 1, added a note clarifying that you must opt in to all the listed categories to build the machine learning model. • Added a **Next Steps** section with information on training and testing the machine learning model.
Test Time Anomalies in Implementation Tenants	NEW How to test time anomalies in an Implementation tenant.
Example: Send Time Tracking Notifications	NEW Illustrates how to configure notifications for Time Tracking.
Concept: Time Anomalies	UPDATED

	In the **Time Anomaly Implementation** section, added detail on training and testing the model.

Workday Scheduling

Steps: Set Up High-Level Scheduling Organizations	UPDATED Added information about Open Shift Bidding functionality.
Steps: Borrow Workers Across Organizations	NEW How to configure the Borrow Workers functionality.
Reference: Scheduling Business Processes	UPDATED Updated with new Cover Shift Bidding Event business process details.
Steps: Set Up Open Shift Bidding	NEW New topic that explains how to set up Open Shift Bidding.

October 4, 2024

Absence

Create Time Off Validations	UPDATED Revised the description for Consecutive Day Maximum and Consecutive Day Minimum in Step 2.
FAQ: How do I delete or inactivate a time off plan?	UPDATED Expanded on the example in the answer.
Setup Considerations: Absence Balances	UPDATED Revised the Question to Consider section to mention that Workday stores balances on the third Sunday of every month.
Steps: Transfer Time Off Balances	UPDATED Revised Step 5 for clarity and consistency.
FAQ: Time Off Balances	UPDATED Revised an answer to correctly state that Workday automatically stores balances on the third Sunday of every month.

Evaluate Absence Calculations	UPDATED Revised Step 3 and the Result section for depth.

Staffing

Create Pay Rate Types	UPDATED Added instructions for editing pay rate type from worker profiles.
Mass Update Job Profile Skills with Workbooks	UPDATED Added clarity to Step 7: Create Custom Reports.
Steps: Set Up Mass Actions on Job Requisitions	UPDATED Added information to the Context about freezing and unfreezing job requisitions.
Set Up Reasons for Job Changes	UPDATED Added information about change job types, and how to find an audit trail for the task.

Time Tracking

Create Time Calculation Tags	UPDATED Expanded the Context and Next Steps sections and added a Usage row to the table in step 2.
Concept: Time Calculations	UPDATED • Added information on removing invalid time calculation snapshots from time calculation group snapshots. • Expanded the first bullet in the **Running Time Calculations** section to explain how to configure the tenant.
Concept: Effective Dating for Time Calculations	UPDATED • Explained that time calculation effective dates are based on the worker time zone. • In the Copy of an Effective-Dated Snapshot section, added the reason for copying snapshots.

Workday Scheduling

Reference: Scheduling Optimization Engine Error Messages	NEW How to troubleshoot issues based on the error message Workday displays.
Troubleshooting: Scheduling After Organization Changes	UPDATED Added a new issue and how to resolve it.

September 20, 2024

Absence

Reference: Tenant Analyzer	UPDATED Updated domain security name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic.
Steps: Remove Invalid Time Off Entries After Termination	UPDATED Revised Step 5 to reflect that the Evaluate and Correct Ineligible Future Time Off Entries task was renamed to Evaluate and Process Events Impacting Absence.
Concept: Using Effective Dated Service Dates in Absence	UPDATED Added details about using the Tenant Analyzer to identify calculations that don't reference the most recent service dates.
Create Accruals	UPDATED Added fields and content needed to configure the Buy Time Off feature.
Create Accruals	UPDATED Added Step 9 and table detailing configuring Expiration Override.
Override Accrual Expiration Dates for a Worker	NEW New topic detailing Maintain Accrual Expiration Overrides task.
Concept: Accrual Expiration	NEW New topic with information around Accrual Expiration.

Setup Considerations: Buy Time Off	UPDATED New Setup Considerations topic for the Buy Time Off feature.
Steps: Set Up Buy Time Off	NEW New topic for the Buy Time Off feature.
Steps: Set Up Workday Payroll for Buy Time Off	UPDATED New topic for the Buy Time Off feature when using Workday Payroll.
Concept: Buy Time Off	UPDATED New concept topic for the Buy Time Off feature.
Steps: Set Up Sell Time Off	UPDATED Added new Standard report, Time Off Sold by Workers.
Concept: Sell Time Off	UPDATED Added new Standard report, Time Off Sold by Workers.
FAQ: Bulk Prorate Accruals	NEW Answers frequently asked questions about the Bulk Automated Accrual Adjustment service step.
Steps: Transfer Time Off Balances	UPDATED Added new bullet in Prerequisites around expiring accruals.
Setup Considerations: Leave of Absence	UPDATED Revised to mention proration based on leave percentage.
Create Leave Types	UPDATED Mentioned the Leave Percentage additional field and Prorate by Leave Percentage check box in Steps 7 and 9.
Schedule Leave Type Effects Synchronization	NEW How to synchronize leave impacts on all existing leave events of a leave type if you've changed your leave type configuration after workers have already requested leave.
Concept: Calculating Leave Taken	UPDATED

	Revised the first paragraph to describe proration.
Reference: Additional Fields for Leave Types	UPDATED Expanded on the description for Leave Percentage.
Steps: Set Up a Leave Balance Deduction Override	UPDATED How to set up a Leave Balance Deduction Override.

Benefits

Create Benefit Providers	UPDATED Corrected the task name in Next Steps from Available Plans to Create Benefit Plan. Added the Benefit Program Partner field and description.
Create Benefit Groups	UPDATED Added description for offsetting costs with unused benefit credits in multiple steps.
Set Up Benefits Messaging	NEW How to set up Benefits Messaging to send your workers branded emails, SMS messages, and push notifications related to their benefits and open enrollment.
Create Health Care Plans	UPDATED Added a description of the new Related Articles field in step 4.
Create Retirement Savings Plans	UPDATED Added step 5 to describe fields for auto contribution increases in the Employee Contribution section. This check box enables workers to contribute automatically to the retirement plan in support of the Secure Act 2.0.
Steps: Set Up Benefit Programs	UPDATED Reorganized steps for clarity. Added the step and link for setting up the worker wellbeing profile cards.
Set Up Security and Endpoints for External Benefit Program Partners	UPDATED Renamed topic from Steps: Set Up Benefit Program Partners to Set Up Security and Endpoints for External Benefit Program

	Partners. Moved information about enabling Benefit Program Partners to Steps: Set Up Benefit Programs because it applies to both external program partners and to benefits administrators.
Configure Benefit Program Cards	UPDATED • Renamed topic from Configure Visibility of Program Cards to Configure Benefit Program Cards. • Updated step 3, the Benefit Coverage Type field, with requirements for which card location you must specify a coverage type.
Set Up the Worker Wellbeing Profile Card	NEW Describes how to configure the wellbeing interests cards for the worker.
Reference: Benefit Deduction End Date Rules	UPDATED Corrected values for the Pay Period Containing Event Date and Pay Period Following Event Date rows.
Assign Benefit Credits to a Benefit Group	UPDATED Added steps for configuring disposition of unused credits and specifying the order in which Workday applies the credits to configured coverage types.
Concept: Benefits Enrollment Events on Mobile	UPDATED Due to its deprecation, we change mentions of the "Benefits worklet" to its replacement "Benefits & Pay Hub."
Change Retirement Savings Elections	UPDATED Added a description of the Auto Contribution Increase field in Step 3, which enables workers to contribute automatically to the retirement plan for the Secure Act 2.0.
Troubleshooting: 1095-C IRS Transmission Errors	UPDATED Added Share-001 to Section III coverage errors for months of the year.

Compensation

Create Compensation Grade Steps	UPDATED We update this topic to include information on Inactivating compensation steps, and assigning Grace Periods to steps for

	purposes of determining the impact of leaves of absence and time offs on step progression.
Set Up Step Progression Configuration and Notifications	UPDATED We update the Next Steps section with the option to override the Workday-calculated Next Step Progression Target Date to a date of your choosing.
Set Up Time Off and Leave Impact on Step Progression	NEW We add a new topic detailing how to set up time off and leave impact on automatic step progression.
Restrict Viewing of Funded and Non-Funded Plan Assignments	UPDATED Updated to include non-funded compensation plan types.
Maintain Compensation Change Templates	NEW Information on the Maintain Compensation Change Templates task.
Reference: Benefits and Pay Hub	UPDATED In the Pay section, added that workers can view any arrears balances using the Pay hub.
Create Commission Plans	UPDATED Added information on percent-based commission plans.
Request One-Time Payments for Employees	UPDATED Added information on the Data Entry Check option for the one-time payment amount.
Steps: Manage Custom Calculations for Compensation Reviews	UPDATED Added information on using custom calculations to round stock awards.
Create Compensation Rounding Rules	UPDATED Added information on using custom calculations to round stock awards.
Create Grid Configurations for Compensation	UPDATED Added information on using Data Entry Check for compensation review fields.

Create Grid Configurations for Compensation	UPDATED Added information on using custom calculations to round stock awards.
Steps: Configure Compensation Review Grid Profiles	UPDATED Added information on the Data Entry Check option for the one-time payment amount.

HCM Innovation Services

Setup Considerations: Case Management	UPDATED • Added new question to consider for enabling case owners to reopen cases. • Added new recommendation for adding custom text and a Knowledge article to the Create Case task. • Added new recommendation for case validations. • Added new recommendation for configuring case notifications. • Added new options to the Tenant Setup section.

Steps: Set Up Case Management	UPDATED
	
	• Updated the Edit Tenant Setup - Help step to include options for
	    • Adding custom text and a Knowledge article to the Create Case task.
	    • Enabling case owners to reopen cases.
	• Added a new step for configuration case notifications.
	• Added a new step for case validations.
	• Added a new step for case satisfaction surveys

Configure Case Notifications	NEW How to configure notifications for Case Management.
Create Case Validations	UPDATED How to create case validations.
Set Up Case Satisfaction Surveys	NEW How to configure case satisfaction surveys.
Reference: Case Management Notifications	UPDATED • Added new tables to reflect updated notifications.

	• Updated the definition of a collaborator.
Steps: Set Up Knowledge Management	UPDATED Updated the first step to include information about enabling the Knowledge Management Articles category in the Maintain Innovation Services Data Selection Opt-In task.
Create Articles	NEW • Updated the choice type to include options for article summarization with AI and article translation with AI. • Removed the Help Article Access domain as a prerequisite.
Summarize Articles with AI	NEW How to summarize an article with AI.
Translate Articles with AI	NEW How to translate an article with AI.
Apply Base Article Content Changes to a Translated Article Version	NEW How to update a translated article from the base article.
Concept: Knowledge Management	UPDATED • Added new section for Article Formatting and updated formatting options. • Added new Article Summarization with AI section. • Added new Article Translation with AI section.

Learning

Setup Considerations: Learning	UPDATED Added information on the new *Manage Internal Learning Assessor* business process and web service. Removed the reference to *Put Internal Learning Assessor*web service.
Steps: Set Up Learning	UPDATED Added an optional step with information on Zoom integration for learning.
Steps: Set Up Learning Assessors	UPDATED Added information about How to set up internal learning assessors.

Reference: Learning Business Processes	UPDATED Added the new Manage Internal Learning Assessor business process.
Setup Considerations: Learner Experience	UPDATED Added information about Branding for Learning to the Business Benefits and Use Cases sections.
Steps: Set Up Learner Experience	UPDATED Added an optional step to configure Branding for Learning.
Configure Branding for Learning	NEW How to configure Branding for Workday Learning.
Setup Considerations: Learning Content	UPDATED Added information about the *Manage Internal Learning Assessor* business process and web service.
Setup Considerations: Learning Lessons	UPDATED Added the new *Manage Internal Learning Assessor* business process and web service.
Steps: Set Up Virtual Classroom Integration with Zoom	NEW A new topic to explain setting up virtual classroom integration with Zoom.
Create Learning Courses	UPDATED Added information on how to enforce lesson order within a course.
Create Learning Course Offerings	UPDATED Added information about an organizer for a virtual classroom lesson.
Reference: Zoom Limitations for Virtual Classroom Integration	NEW A new reference topic with information about Zoom limitations for virtual classroom integration.
Reference: Learning Records and Report Data Sources	UPDATED Added the new Learning Trainer report data source.

Reference: Workday-Delivered Reports for Learning	UPDATED Added the Find Learning Assignments and My Team's Learning Assignments reports.

Manager Insights Hub

Setup Considerations: Manager Insights Hub	UPDATED Added information about different functional areas and what features they enable you to access on the Hub.
Steps: Set Up Manager Insights Hub	UPDATED Added information about different functional areas and what features they enable you to access on the Hub.
Concept: Manager Insights Hub	NEW Information about the Manager Insights Hub.
Reference: Manager Insights Hub	UPDATED Updated Feedback Tab section with feedback card information.
Reference: Manager Insights Hub	UPDATED Changed the title of this topic from Reference: Manager Insights Hub Cards to Reference: Manager Insights Hub. Added information about the new sections on the hub.

Recruiting

Concept: Parallel Stages	UPDATED In the Overview section, added information about automatic stage routing support.
Steps: Set Up Job Description Generation on Job Requisitions	UPDATED How to set up job description generation on job requisitions using generative Artificial Intelligence.
Configure Prospect Consent Terms and Conditions	UPDATED Added the Consent Page section in step 1.
Steps: Automatically Advance or Decline Candidates	UPDATED

	In the Context section, removed the line about being unable to configure automatic stage routing on back-to-back stages of the Job Application business process.
Steps: Set Up Conversational Messaging for Candidates	UPDATED • Included link to the Steps: Set Up Workday Messaging topic in Step 1. • Added Australia as a supported country for SMS.
Concept: Candidate Conversational Messaging for SMS	UPDATED In the Candidate Experience section, added Australia as one of the supported countries.
Manage SMS Preferences for Candidates	UPDATED Added Australia as one of the countries supported for SMS.
Steps: Set Up External Career Sites	UPDATED Added an optional step for opting in to the External Career Site Apply Flow Improvements feature.
Create External Career Sites	UPDATED Added a new step 8 for enabling Job Alerts.
Create External Career Sites	UPDATED • Added information about the section title in Candidate Home in the new step 12. • Expanded the new step 16 to provide information on the Withdraw Confirmation Message.
Concept: Job Posting End Date and Time Left to Apply	UPDATED Information to consider about Job Posting End Date and Time Left to Apply

Skills and Skills Cloud

Setup Considerations: Skills Cloud	UPDATED Replaced reference to the Put Job Profile web service with the Submit Job Profile web service.

Staffing

Change Worker Service Dates	UPDATED

	Added information about v43.0 of the Edit Service Dates web service.
Steps: Set Up Job Profile Business Process	**UPDATED** Added information to Context section about effective dated fields for job profiles. Added information about the Submit Job Profile web service.
Create Job Profiles	**UPDATED** Added information to Next Steps section about effective dated fields for job profiles. Replaced references to the Put Job Profile web service with the Submit Job Profile.
Create and Edit Job Requisitions	**UPDATED** Added the option to add collective agreements and factors when creating job requisitions to the Next Steps section.
Setup Considerations: Collective Agreements	**UPDATED** Added information about collective agreements on job requisitions to the Business Processes and Integrations sections.
Steps: Set Up Hire	**UPDATED** Updated Steps 4 and 5 to include information on the consolidated hire experience.
Hire Employees	**UPDATED** We add information on Pre-Hires to the Prerequisites and Results sections.
Concept: Hire Employee Initiating Actions	**UPDATED** Added information on initiating actions for an enhanced Pre-Hire Search experience.
FAQ: Hire Employee Redesign and Consolidation Experience	**NEW** Answers frequently asked questions about Hire Employee Redesign and Consolidation Experience.
Troubleshooting: Configure Business Process Consolidated Template	**NEW** How to diagnose and resolve issues relating to the Configure Business Process Consolidated Template task.

Steps: Set Up Contingent Workers	UPDATED Updated Step 7 to include information on the consolidated hire experience.
Change Contingent Worker Details	UPDATED
Setup Considerations: Job Changes	UPDATED Added considerations to the Connections and Touchpoints section.
Steps: Set Up Job Changes	UPDATED Added information about the change job new user experience.
Set Up Change Job Templates	UPDATED Added information about the change job new user experience.
Steps: Enable Machine Learning Recommendations for Change Job	UPDATED Added the Compensation Plan field.
Transfer, Promote, or Change Job	UPDATED Added information about Workday dynamically hiding fields on change job templates with the enhanced user interface.
Setup Considerations: International and Domestic Assignments	UPDATED Updated the limitations to call out Workday Payroll for Australia.
Concept: HR Partner Hub	UPDATED Added information on using the HR Partner Hub filter to find data on past-dated events.
FAQ: Can I control which job details are visible on worker profiles?	UPDATED Added information about adding a custom report to a worker profile.

Talent

Steps: Set Up Goals	UPDATED • Updated Context section to highlight the card format information in a note.

	• Removed substeps from step 2. The Goals report now supports mobile and desktop users.
Set Up Individual Goals	**UPDATED** Added Individual Goals initiating action to step 1 for the Goals User Experience Redesign Multi-Management of Goals feature.
Set Up Organization Goals	**UPDATED** • Moved the information for Organization Alignment to step 2 and updated the text for clarity. • Added the new organization goal description field to the table in the new step 3.
Create or Edit Individual Goals	**UPDATED** Added information about Goals User Experience Redesign Multi-Management of Goals to step 3.
Create Development Items	**UPDATED** Added information about the Skills to Develop feature.
Process: Refine Maintained Skills for Career Hub Matching	**UPDATED** Replaced reference to the Put Job Profile web service with the Submit Job Profile web service.
Setup Considerations: Talent Marketplace	**UPDATED** In the Integrations section, added information about new web services for flex teams.
Steps: Set Up Talent Marketplace	**UPDATED** In Step 7, added information about the Browse Flex Teams report.
Steps: Set Up Flex Teams	**UPDATED** • Added Step 2 for setting up Enterprise Interface Builder (EIB) integrations for Flex Team web service operations. • In the Results, added information about the new Browse Flex Teams report.
Process: Refine Maintained Skills for Talent Marketplace Matching	**UPDATED** Replaced reference to the Put Job Profile web service with the Submit Job Profile web service.

Concept: Employee Review Editors	UPDATED Added information about Autosave to the Guided Experience section.
Concept: The Employee Review Process	UPDATED Created the Saving Employee Review section to include information about the Autosave feature.
Setup Considerations: Performance Reviews	UPDATED Removed the recommendation to instruct workers to save their work due to tenant time out.
Concept: Ratings and Weightings	UPDATED Removed the View Goals report.

Time Tracking

Steps: Enable Time Tracking for Mobile	UPDATED In step 5, added: • Information for managers accessing the worklet for the first time. • That Workday displays a list of workers not checked out. • *Worker Data: Add Clock Event* to the list of domains.
Set Up Time Entry Calendars	UPDATED In step 5, added the **Include Scheduling Data** option to the table.
Concept: Time Shifts	UPDATED Added new report to use when daily evaluation of worker eligibility for time calculations is configured.
Create Time Calculation Groups	UPDATED Added the optional step for the new Country / Country Region prompt.
Manually Run Time Calculations	UPDATED Added information when daily evaluation of worker eligibility for time calculations is selected.

Example: Daily Evaluation of Worker Eligibility for Time Calculations	UPDATED New example topic for the Effective Date Support for Midweek Changes in Time Calculations feature.
Concept: Time Calculations	UPDATED Added behavior of worker eligibility for time calculations when the Run Time Calculation Eligibility Day by Day check box is selected.
Concept: Effective Dating for Time Calculations	UPDATED Updated the Effective Dating and Eligibility section when the Effective Date Support for Midweek Changes in Time Calculations feature is enabled.
Concept: Daily Evaluation of Worker Eligibility for Time Calculations	UPDATED New concept topic for the Effective Date Support for Midweek Changes in Time Calculations feature.
Concept: Shift Crossing Weeks with Eligibility Change	UPDATED New concept topic related to the Effective Date Support for Midweek Changes in Time Calculations feature.
Concept: Time Calculation Debugger	UPDATED New concept topic related to the Effective Date Support for Midweek Changes in Time Calculations feature.
Create Time Entry Validations	UPDATED Added an example of how to prevent workers entering time when on leave on the same day.
Concept: Time Entry Validations	UPDATED Added a usage example for the Leaves for a Day report field.
Concept: Worker Eligibility for Time Tracking	UPDATED Included the scenario of when a worker must meet eligibility when the Run Time Calculation Eligibility Day by Day check box is selected.
FAQ: Paying Time	UPDATED For the FAQ asking if worked overtime hours before a worker's midweek transfer are passed to payroll, added the

	scenario when the Run Time Calculation Eligibility Day by Day check box is selected.
Auto Submit Time	**NEW** A new topic to explain creating schedules to submit time automatically.
Concept: Time Clock Events	**UPDATED** Clarified that these reports are only available on desktop: • **My Time Clock History** • **Time Clock History**
Concept: Enter Time by Period	**UPDATED** Removed the table showing the difference in data displayed in the classic and period calendar views.
Concept: Daily Time Exceptions	**NEW** Describes the concept of managing daily time exceptions on mobile devices in Workday.
Steps: Set Up Time Tracking Notifications	**UPDATED** In step 5, clarified the purpose of creating a scheduled distribution and simplified the description of**Type**.
Set Up No Shows	**NEW** New topic that explains how to set up No Shows for attendance management.

Worker Information

Set Up Global Address Lookup	**UPDATED** Added information about how to enable Address Lookup using third-party services for over 200 countries that Workday supports.
Set Up Address Autofill	**UPDATED** How to accurately capture an address as you enter it using autofilled vendor address data.
Set Up Global Address Validation	**UPDATED** How to set up real-time global address validation.

Integrations

March 14, 2025

Financials Connectors

Steps: Set Up Integration to Import EDI 855 Purchase Order Acknowledgments	UPDATED Added link to Steps: Automate Changes from Purchase Order Acknowledgments to complete the process.
Setup Considerations: Supplier Punchout Integration	UPDATED In the Questions to Consider section, added a table row to provide more information on Ship To or Workspace Locations with additional address components.
Steps: Set Up Punchout Purchase Order Integration	UPDATED In Step 3, added a table row to provide information on the Allow Multiple Address Lines With Max Number integration attribute.

Global Payroll Connect

Concept: Global Payroll Connect	UPDATED We added to the Global Payroll Connect list.
Steps: Set Up Additional Payroll Data	UPDATED Expanded the Next Steps to provide information on how workers can view their payroll data on the Benefits and Pay hub.
Reference: Data Sections for Data Changes on Demand	UPDATED Added Pay Status Code to the Worker Status data section. Added Configurable Compensation Basis to the Compensation Data/Compensation Summary data sections.
Reference: Data Changes on Demand Request Criteria Parameters	UPDATED Added configurableCompensationBasis to the Response Filters section.

Setup Considerations: Global Payroll Hub	UPDATED Added create and manage a checklist for third-party payroll to the Business Benefits section.
Steps: Set Up Global Payroll Hub	UPDATED Added a step for setting up third-party payroll processing checklists.
Set Up Global Payroll Processing Checklists	NEW How to set up payroll processing checklists on Global Payroll Hub.
Configure Payroll Effective Change Interface Integration Attributes and Maps	UPDATED Added the new Compensation Change Reason Only (Secondary) option for the Include Compensation Data Section integration attribute.
Reference: Data Sections for Payroll Effective Change Interface	UPDATED Updated to include the Pay Status Code field attribute in the Worker Status Data section and the Configurable Compensation Basis field attribute in the Compensation Data subsections.
FAQ: Payroll Effective Change Interface	UPDATED Added a section about configurable compensation basis.
Configure Worker Effective Change Interface Integration Attributes and Maps	UPDATED Added the new Compensation Change Reason Only (Secondary) option for the Include Compensation Data Section integration attribute and the new Job Change Reason Only (Secondary) option for the Include Position Data Section integration attribute.
Setup Considerations: External Payroll Documents	UPDATED In Questions to Consider and Business Processes, added information about the Review External Payroll Document business process. In the Limitations section, clarified that an individual attachment file now can't exceed 2.5 MB.
Steps: Set Up External Payroll Document Reviews	NEW How to set up worker reviews of external payroll documents.

Concept: External Payroll Documents	UPDATED Added information on the Review External Payroll Document business process.

HCM Connectors

Configure the Absence Third-Party Calendar Integration	UPDATED Added an optional step for the Advanced Logging Enabled option.

Student Connectors

Steps: Set Up TSM and FAH NSLDS Transaction Outbound Integration	NEW How to set up the TSM and FAH NSLDS Transaction Outbound integration.
Concept: Student Financial Aid Connectors	UPDATED Added link to Steps: Set UP TSM and FAH NSLDS Transaction Outbound Integration topic.
Steps: Set Up Common Application Inbound Integration	UPDATED Combined steps for configuring domain access into Step 9.

Workday REST API

Reference: Workday Object Resource Names and Object Keys	UPDATED Added allocationPools.

February 21, 2025

Global Payroll Connect

Test Payroll Effective Change Interface Field Overrides	UPDATED Updated the data source to use in step 1.

Workday Extend

Reference: Workday Developer Site Glossary	UPDATED

	• Renamed to Workday Developer Site Glossary. • Added terms used by both Integration and Extend apps.

Workday Payroll Connectors

Concept: Canada Annual Tax Filing Integrations	UPDATED In the Integration Launch Parameters section, added information for the Override BN15 (optional) and Transmitter Rep ID (optional) fields.

February 7, 2025

Financials Connectors

Steps: Set Up Financial Journal Lines Outbound Connector	UPDATED In step 2, included the optional Accounting Date Filter Service integration template service and description.

Global Payroll Connect

Setup Considerations: Data Changes on Demand	UPDATED Updated to clarify the security permissions the ISU needs access to.
Create Integration System User for Data Changes on Demand	UPDATED Updated to clarify the security permissions the ISU needs access to. How to set up an integration system user for the Data Changes on Demand feature.

HCM Connectors

Steps: Set Up ACA Information Returns Connector	UPDATED • Added ACA Information Returns 2024 template. • Removed ACA Information Returns 2020 template.
Concept: Affordable Care Act (ACA) Connectors	UPDATED • Added ACA Information Returns 2024 template. • Removed ACA Information Returns 2020 template.

January 24, 2025

Enterprise Interface Builder (EIB)

Concept : ajouter le Créateur d’interfaces Entreprise pour la vaccination	UPDATED Added statement in Background section indicating you must create the EIB in your tenant and then generate the spreadsheet from that EIB.
Concept : générateur d'interfaces Entreprise (EIB) pour ajouter un compte Workday	UPDATED Updated the Notification Sub Type WIDs section to include an Ad Hoc Worker WID.
Concept : Créateur d’interfaces Entreprise pour l’importation d’événements de pointage	UPDATED Updated the recommended batch size of the Put Time Clock Events EIB to 150.
Concept : générateur d'interfaces Entreprise (EIB) d'insertion des événements de pointage	UPDATED Updated the description of Spreadsheet Key to recommend using a maximum of 150 time clocks per batch.

HCM Connectors

Steps: Set Up LinkedIn Recruiter System Connect	UPDATED • Updated a bullet in the Prerequisites section to include a link to LinkedIn's page about user license and permissions. • Added a sentence in Step 3 that mentions that a LinkedIn Recruiter admin license is required for the step.
Steps: Set Up Outbound LinkedIn Recruiter System Connect	UPDATED • Updated the Prerequisites section to mention steps to complete from the Steps: Set Up LinkedIn Recruiter System Connect topic. • In Step 4, added the typical scheduled run frequency.
Steps: Set Up Inbound LinkedIn Recruiter System Connect	UPDATED • Updated the Prerequisites section to mention steps to complete from the Steps: Set Up LinkedIn Recruiter System Connect topic. • In Step 5, added the typical scheduled run frequency.
Concept: Verification Inquiries	UPDATED

	Expanded the Verification Inquiry Transaction Logs section to provide more information about the transaction log emails.

Workday Payroll Connectors

Concept: Tax Filing Integration Launch Options	UPDATED Expanded the Tax Filing Integration Launch Setup Notes section to provide more information about the launch prerequisites.

January 10, 2025

Enterprise Interface Builder (EIB)

Concept : Créateur d'interfaces Entreprise pour la soumission de profil d'emploi	UPDATED Updated information about the security needed to run the EIB, and removed references to the Put Job Profile EIB.
Concept : Créateur d'interfaces Entreprise (EIB) pour l'offre	UPDATED Added clarification on how to correctly configure the Offer EIB.

Financials Connectors

Steps: Manage Workday Bank Connectivity	UPDATED In Step 1b, added that you must specify the branch ID when you create a bank branch.
Steps: Set Up Bank Connectivity - Import Payment Status Integration	UPDATED Changed Step 2 to an optional step and removed the table of attributes. In Step 5, added the File Name/Pattern value to specify for the document retrieval step configuration.
Reference: Import Payment Status Files and Statuses	UPDATED In the payment acknowledgement file descriptions, added that Kyriba generates the files displayed in the file format examples.

Global Payroll Connect

Concept: PECI and DCoD Comparison	UPDATED

	Updated the Compensation Change Reason Only row for PECI.
Concept: PECI and DCoD Comparison	NEW Describes the concepts of the differences of the Payroll Effective Change Interface intergration and the Data Changes on Demand integration.
Steps: Set Up Event Outbound Notifications	UPDATED Added a note to step 4a for where to set the *Assign Pay Group* step on the *Hire* business process.

Workday Extend

Reference: Orchestration Runtime Limits	UPDATED Updated the Workday Business Process orchestration runtime callback period from 30 days to 90 days.

December 27, 2024

Workday Extend

Reference: Workday Developer Site Glossary	UPDATED Converted the table of glossary terms to an alphabetized list.

December 13, 2024

Enterprise Interface Builder (EIB)

Troubleshooting: Enterprise Interface Builder	UPDATED Added section on how to recover and XSLT attachment.
Concept : Créateur d’interfaces Entreprise pour soumettre l’inscription aux choix de paiement	UPDATED Added explanation of how to distribute payments to multiple accounts using EIB.
Concept : établir le Créateur d’interfaces Entreprise pour l’affectation des coûts	UPDATED Added Assign Costing Allocation EIB template v45.

Financials Connectors

Reference: Accounting Journal Connector CSV File Format	UPDATED Added a CSV template file download in the context.
Reference: Payment Connector Integration Data Sections	UPDATED Removed Handling Code from the Payment Data row as it's no longer supported by the integration.
FAQ: Workday Bank Connectivity Integration	UPDATED Removed the FAQ on whether Kyriba supports large volumes of payroll payments as it's covered in more detail during the sales process.

Global Payroll Connect

Setup Considerations: Global Payroll Hub	NEW Added to the Questions to Consider for integrations you need.
Setup Considerations: Payroll Effective Change Interface	UPDATED Expanded the Limitations section to include that PECI doesn't support time off adjustments for the Time Off Earnings and Deductions / Grouped Time Off Entry data section.
Reference: Data Sections for Payroll Effective Change Interface	UPDATED Clarified in the Time Off Earnings and Deductions / Grouped Time Off Entry data section that the section doesn't support time off adjustments.
Steps: Set Up Payroll Integration System	UPDATED Expanded Step 5to add more information about the View: External Pay Groups domain.
Setup Considerations: External Payroll Documents	UPDATED In Limitations section, clarified that multiple attachments must be in a ZIP file.
Steps: Set Up External Payroll Results Inbound Integration	UPDATED In Step 6, added more information about the View: External Pay Groups domain.

Steps: Set Up Import External Payslips Integration	UPDATED Expanded Step 8 to add more information about the View: External Pay Groups domain.

HCM Connectors

Concept: Workday Connector for Equifax Verification	UPDATED Expanded the Data Provided to Equifax for Verification Services section to provide more information about what information in Workday is used for Equifax's verification services.
Steps: Enable Workday Connector for Equifax Verification	UPDATED Added a Next Steps section to provide more information about the Verification of Employment and Income Data for Worker report.
Set Up Workday Connector for Equifax Verification	UPDATED Expanded Step 3 to provide more information about the Company field.
Concept: Verification Inquiries	NEW Describes the concept of verification inquiries related to the Workday Connector for Equifax Verification in Workday.

Integration Business Processes

Set Up Integration Delivery	UPDATED Added information about delivery methods for outbound EIBs.

Workday Payroll Connectors

Concept: Tax Filing Integration	UPDATED In the Integration Processing section, clarified how the tax filing integrations use the Payroll Result Completion Moment.

November 15, 2024

Global Payroll Connect

Concept: Global Payroll Connect	UPDATED We removed the Cloud Connect for Third-Party Payroll section since these topics are now under Global Payroll Connect. If you have bookmarked topics in this section, you may want to update your bookmarks.
Concept: Global Payroll Connect	UPDATED We moved topics in the Cloud Connect for Third-Party Payroll section under Global Payroll Connect. If you have bookmarked topics in this section, you may want to update your bookmarks.
Setup Considerations: Data Changes on Demand	UPDATED Added to the Questions to Consider section to include information about using Data Cha with multiple 3rd payroll vendors and clarified in the Limitation Section about the ability to configure the order of the effective changes in the output.
Setup Considerations: Data Changes on Demand	UPDATED Added to the Limitations section to include the amount of in-progress events you can have.
Setup Considerations: External Payslips REST API	UPDATED Renamed all instances of REST API External Payslips to External Payslips REST API.
Steps: Set Up External Payslips REST API	UPDATED Renamed all instances of REST API External Payslips to External Payslips REST API.
Steps: Set Up External Tax Documents REST API	UPDATED Renamed all instances of REST API External Tax Documents to External Tax Documents REST API.

Workday Extend

Reference: Use Model Tasks to Access Extend Apps in Workday	UPDATED

	Clarified that topic applies to model tasks only, and provided inline link to information about custom tasks.

Workday Payroll Connectors

Reference: Tax Filing Reports	UPDATED Expanded the Quarterly Data Reports section to provide more information about the Include In Progress Results Only check box.

November 1, 2024

Financials Connectors

Reference: Electronic Invoice Connector XML Schema	UPDATED Updated the XML schema to include the latest functionality changes.

Global Payroll Connect

Reference: Payroll Integration Output and Audit Files	UPDATED Updated to clarify which fields display in the Data Changes Audit report for which integrations.
Reference: Data Sections for Data Changes on Demand	UPDATED Added Payment Date to the Compensation One Time Payments data section. Added Locality Pay Area Assignments to the Position/ Business Sites data section.
Setup Considerations: Payroll Effective Change Interface	UPDATED Expanded the Limitations section to provide more information about costing allocations and the PECI integration.
Concept: PECI Transaction Logs	UPDATED Clarified how indirect and direct changes are reported in the integration output.
FAQ: Time Tracking Entries for Payroll Interface	UPDATED

	Expanded the Why Didn't the Integration Report a Time Tracking Entry? section to provide more information on time tracking entries approved after a termination.

HCM Connectors

Concept: Workday Connector for Equifax Verification	NEW Describes the concept of the Workday Connector for Equifax Verification in Workday.
Steps: Set Up Notifications for Workday Connector for Equifax Verification	NEW How to set up notifications about the Workday Connector for Equifax Verification for UMSA customers.
Steps: Enable Workday Connector for Equifax Verification	NEW How to enable the Workday Connector for Equifax Verification.
Set Up Workday Connector for Equifax Verification	NEW How to set up the Workday Connector for Equifax Verification.

Workday Extend

Reference: Use Model Tasks to Access Extend Apps in Workday	UPDATED Updated the Shortcuts section to refer to the Global Navigation menu.

Workday REST API

Reference: External Data Limits	UPDATED Clarified the maximum number of fields allowed in tables and published datasets.

October 18, 2024

Financials Connectors

Reference: Bank Fee Statement Connectors XML Schema	UPDATED Updated with the latest XML schema for the bank fee statement connector.

Global Payroll Connect

Reference: File Schema for Payroll Effective Change Interface	UPDATED Updated to include that we don't recommend you reference the schema example and instead pull the schema file that Workday generates.
Steps: Configure Alerts for External Payroll Documents	NEW How to configure alerts for external payroll documents.

HCM Connectors

Steps: Set Up LinkedIn Recruiter System Connect	UPDATED • Migrated content from the Steps: Set Up LinkedIn Recruiter System Connect Integration topic to this topic. • Added a new step for the Set Up Scheduled LinkedIn Recruiter System Connect Integrations topic. • Removed the Results section.

Workday REST API

Reference: External Data Limits	UPDATED Increased the external data limits for creating and editing buckets in a 24-hour rolling period to 24,000.

October 4, 2024

Enterprise Interface Builder (EIB)

Concept : changer le Créateur d'interfaces Entreprise (EIB) des avantages sociaux	UPDATED Removed the row for the validation error in the Common Issues and Errors table.

Financials Connectors

Concept: Workday Bank Connectivity Integration	NEW Describes the concept of Workday Bank Connectivity for bank integrations.
Steps: Manage Workday Bank Connectivity	NEW

	How to configure Workday Bank Connectivity.
Steps: Set Up Bank Connectivity - Payments Initiation Integration	NEW How to set up the Workday Bank Connectivity integration used for processing payments.
Steps: Set Up Bank Connectivity - Import Payment Status Integration	NEW How to set up the Workday Bank Connectivity integration used for importing the payment statuses from your banks.
Steps: Set Up Bank Connectivity - Import Bank Statements Integration	NEW How to set up the Workday Bank Connectivity integration used for importing bank statements from your financial institutions.
Reference: Import Payment Status Files and Statuses	NEW Provides additional information about the inbound payment acknowledgement integration files and payment statuses.
FAQ: Workday Bank Connectivity Integration	NEW Answers frequently asked questions about Workday Bank Connectivity.

HCM Connectors

Steps: Register Your Client-Side Service Account for Google	UPDATED Added more details about the Super Admin role in Step 2 (d).
Set Up Scheduled LinkedIn Recruiter System Connect Integrations	NEW Illustrates how to schedule integrations for LinkedIn Recruiter System Connect.
Concept: LinkedIn Recruiter System Connect	UPDATED In the Imported LinkedIn InMails section, removed the table and added information about LinkedIn InMail data.

Student Connectors

Concept: Student Financial Aid Connectors	UPDATED Added the student date-of-birth matching criteria to the COD Loan App and Credit Status Inbound table row.

Workday Extend

Reference: Limits on Graph API	UPDATED Added the file attachment size limit.

September 20, 2024

Benefits Connectors

Steps: Set Up Benefit Provider Integration	UPDATED Added a row in Step 2 for Worker Data: Workers (Outbound) for use with contextual security.
Steps: Set Up the Workday Benefits Connector V2 Integration	NEW Describes how to set up the Benefits Connector v2 integration.
Set Up Benefits Connector V2 Integration Services	NEW Describes how to configure the Benefits Connector V2 integration services.
Set Up Benefits Connector V2 Attributes and Maps	NEW Describes how to configure the Benefits Connector V2 attributes and maps.
Concept: Benefits Connector Workflow	UPDATED Updated the workflow for Benefits Connect v1 and v2.
Concept: Benefits Connector V2 Change Detection	NEW Describes the change detection process for Benefits Connector v2.
Concept: Benefits Connector V2 Data Validation and Error Handling	NEW Describes validation and error handling for Benefits Connect v2.
Reference: Benefits Connector Data Sections	UPDATED Updated these fields to make the descriptions correct for both v1 and v2 of the benefits connector: • Status Data • Position Data

	• Coverage: Health Plan • Coverage: FSA Plan Data • Coverage: Retirement Savings Plan Data • Coverage: Life and Disability Data
Reference: Benefits Connector V2 Audit Files	NEW Describes the audit files for the Benefits Connector V2.
FAQ: Benefits Connector	UPDATED Removed obsolete questions.
Steps: Set Up the Workday Benefits Connector V1 Integration	UPDATED Changed the title to include V1 to indicate that these steps are for the original benefits connector. Moved to a subsection for v1-only information.
Set Up Benefits Connector V1 Integration Services	NEW Added V1 to the title to indicate that this information is for the original benefits connector. Moved to a subsection for v1-only information.
Set Up Benefits Connector V1 Attributes and Maps	UPDATED Added V1 to the title to indicate that this information is for the original benefits connector. Moved to a subsection for v1-only information.
Concept: Benefits Connector V1 Change Detection	NEW Added V1 to the title to indicate that this information is for the original benefits connector. Moved to a subsection for v1-only information.
Concept: Benefits Connector V1 Data Validation and Error Handling	UPDATED Added V1 to the title to indicate that this information is for the original benefits connector. Moved to a subsection for v1-only information.

Data Initialization Service (DIS) Integration

Set Up Integration Data Initialization Service	UPDATED Added information about custom advanced reports and DIS.

Enterprise Interface Builder (EIB)

Launch EIB Spreadsheet Upload	**UPDATED** Updated the Integration Criteria table to provide: • Clarification on the **Load Error Limit** option. • A description of the **Handle Import Processing Errors** check box. Moved the scheduling integrations step to reflect the correct navigation sequence for the **Run Frequency** prompt.
Concept : Créateur d'interfaces Entreprise pour le chargement de profil d'emploi	**UPDATED** Added information about the Submit Job Profile web service.
Concept : Créateur d'interfaces Entreprise pour la soumission de profil d'emploi	**UPDATED** Information about the Submit Job Profile web service.

Financials Connectors

Steps: Set Up Integration to Export EDI 850 Purchase Orders	**UPDATED** Added Step 7 to provide information on the EDI Code field on the Maintain Shipping Information task, and expanded Step 6 to provide information on rush order purchase order types.
Steps: Configure UBL Version 2.1 Electronic Customer Invoice Integration Service Map	**UPDATED** Added information aboout new maps for company and customer Tax IDs in Step 3.
Steps: Configure cXML Electronic Customer Invoice Template	**UPDATED** How to configure maps and attributes in the cXML Electronic Customer Invoice template.
Steps: Automate Electronic Invoice Document Delivery for cXML	**UPDATED** How to configure credentials for external third-party portals connections so that you can post to their endpoints, and automate the process of launching the cXML integration upon customer invoice submission.
Concept: Electronic Invoice Connector	**UPDATED** Added information aboout Concatenate Additional Address Line integration attribute in the UBL 2.1 Electronic Customer Invoice table.

Steps: Set Up Bank Integrations for Settlement Processing	UPDATED Changed information from sequence generator to gapless sequence generator.

Global Payroll Connect

Concept: Global Payroll Connect	NEW Information about Global Payroll Connect features.
Steps: Set Up Additional Payroll Data	NEW How to set up additional payroll data.
Concept: Additional Payroll Data	NEW Describes the concept of additional payroll data in Workday.
Setup Considerations: Data Changes on Demand	NEW Information to consider before setting up the Data Changes on Demand feature.
Steps: Set Up Data Changes on Demand	NEW How to setup an integration system user for the Data Changes on Demand feature.
Create Integration System User for Data Changes on Demand	NEW How to set up an integration system user for the Data Changes on Demand feature.
Concept: Data Changes On Demand	NEW Describes the concept of Data Changes on Demand in Workday.
Concept: Data Changes on Demand Change Detection	NEW Describes the concept of change detection behavior in Data Changes on Demand.
Reference: Data Sections for Data Changes on Demand	NEW Provides additional information about the data sections for the Data Changes on Demand feature.
Reference: Data Changes on Demand Request Criteria Parameters	NEW

	Provides additional information about the request criteria parameters for the Data Changes on Demand feature.
Steps: Set Up Event Outbound Notifications	NEW How to set up event outbound notifications for third-party payroll systems.
Create Integration System User for Event Outbound Notifications	NEW How to set up event outbound notifications for third-party payroll systems.
Setup Considerations: Global Payroll Hub	NEW Information to consider before setting up Global Payroll Hub.
Steps: Set Up Global Payroll Hub	NEW Information on how to set up the Global Payroll Hub.
Steps: Set Up Inbound Notifications	NEW How to set up event outbound notifications for third-party payroll systems.
Create Integration System User for Inbound Notifications	NEW How to set up event outbound notifications for third-party payroll systems.
Reference: Inbound Notifications Request Sample	NEW Provides additional information event outbound notifications for third-party payroll systems.
Setup Considerations: Payroll Interfaces	UPDATED Added a bullet in the Limitations section about adding new pay periods.
Setup Considerations: Payroll Effective Change Interface	UPDATED Updated the Security section to correct the functional area to run the PECI integration in primary mode.
Setup Considerations: Payroll Effective Change Interface	UPDATED Expanded the Limitations section to provide more information about adding new pay periods.

Reference: Data Sections for Payroll Effective Change Interface	**UPDATED** Updated to include the Worktag field attributes in the Time Off Earnings and Deductions data sections and Primary field attributes in the Personal Communication and Related Persons Communication sections. Also updated to include field attributes for U.S. Federal customers: • the Creditable Service subsection in the Worker Status data section. • Retirement Special Population, Employment System, and Federal Employer Identification Number field attributes in the Position Data section. • Locality Pay Area Assignments field attribute to the Business Site subsection of the Position Data section. • Additional Military Service subsection in the Personal Data and Personal Data by Country sections. • Disabled Veteran Leave Date and Uniformed Service Reserve Status Code field attributes in the Additional Military Service subsection.
Setup Considerations: Payroll Interface Integration Command Center	**UPDATED** Added the Manage: Payroll Interface Integration Command Center Data Queue domain to the Security section for the Manage Payroll Interface Integration Command Center Data Queue task.
Steps: Configure Payroll Interface Integration Command Center	**UPDATED** Added the Manage: Payroll Interface Integration Command Center Data Queue domain to security to run the Manage Payroll Interface Integration Command Center Data Queue task.
Steps: Set Up Local Payroll Data	**UPDATED** Added a note about the retirement of Local Payroll Data.
Reference: Data Sections for Worker Effective Change Interface	**UPDATED** Updated to add the Primary field attributes in the Personal Communication / Address and Related Persons Communication / Address sections.
Steps: Set Up Callback for External Payroll	**NEW** How to set up callback messages for external payroll.
Setup Considerations: External Payroll Documents	**UPDATED**

	Expanded the Integrations section to provide information on the Import External Payroll Document web service.

Launch and Manage Integrations

Concept: Integration Schedules and Weekly Service Updates	UPDATED Added information about response codes.
Reference: Integration Event Statuses	UPDATED Added information about integrations that complete with errors.

Student Connectors

Concept: Student Financial Aid Connectors	UPDATED In the COD MPN Inbound description, added information about Workday auto-completing MPN action items for awards with an MPN status of Accepted or Pending.

Workday Payroll Connectors

Steps: Set Up ADP Check Print Integration	UPDATED In the Steps section, expanded Step 8 to include information about the DBA Name integration field override.
Steps: Set Up Inbound Electronic Income Withholding Order Integration	UPDATED In the prerequisite section, removed a link to a retired Community post.

Workday REST API

Concept: Custom Object (Multi-Instance) REST APIs	UPDATED Added the validate-only option using the x-validate-only header.
Concept: Custom Object (Single-Instance) REST APIs	UPDATED Added the validate-only option using the x-validate-only header.

Workday Web Services and Integration IDs

Concept: Get Workers SOAP Web Service Guidelines and Troubleshooting	UPDATED Updated the link for the sample file.

Manage Workday

March 14, 2025

Business Processes

Concept: View Business Process Details	UPDATED In the All Actions row, added information about the Event Record Moment column.
Concept: Business Processes	UPDATED Added more information in the Business Processes and Security section.
Concept: Integration Step	UPDATED Added information about automatically advancing the business process to the next step.
Concept: To Do Step	UPDATED Added information about the new Edit To Do task
Configure Redirect on Business Process Steps	UPDATED Added information about automatically advancing the business process to the next step.
Launch Orchestrations on Business Process Status Changes	UPDATED Added Correct and Deny as actions that can trigger an orchestration launch.
Set Up Multiple Position Routing	UPDATED Added Request to the list of BPs that support the Additional Positions and Primary Position routing modifiers to the Context section

Concept: Requests	UPDATED Updated the Create Request information to include assigning security groups to the security policy

Collaboration

Setup Considerations: Campaigns	UPDATED Added a note about Campaigns retirement.
Steps: Set Up Campaigns	UPDATED Added a note about Campaigns retirement.
Steps: Create Campaign Categories	UPDATED Added a note about Campaigns retirement.
Steps: Schedule Worker Communication Notifications	UPDATED Added a note about Campaigns retirement.
Create Audiences to Use in Collaboration Tasks	UPDATED Added a note about Campaigns retirement.
Create Campaigns	UPDATED Added a note about Campaigns retirement.
Schedule a Notification to Send in the Future	UPDATED Added a note about Campaigns retirement.
Concept: Campaigns and Scheduled Distributions	UPDATED Added a note about Campaigns retirement.
Example: Administer a Campaign	UPDATED Added a note about Campaigns retirement.
FAQ: Campaigns	UPDATED Added a note about Campaigns retirement.
Setup Considerations: Engagement Builder	UPDATED

	Information to consider before setting up Engagement Builder.
Create an Integration System User (ISU) for Engagements	UPDATED How to configure an Integration System User (ISU) for Engagement Builder.
Set Up Engagement Builder	UPDATED How to set up Engagement Builder.
Create an Audience	UPDATED How to set up an audience.
Create an Engagement	UPDATED How to set up an engagement.
Concept: Manage an Engagement	UPDATED Describes the concept of managing an engagement in Workday.

Organizations

Setup Considerations: Organizations	UPDATED Added information about the new Remove Multiple Matrix Members business process.
Steps: Set Up Matrix Organization Business Processes	UPDATED Added information about the new Remove Multiple Matrix Members business process.
Steps: Set Up Matrix Organization Business Processes	UPDATED In Step 2, corrected the name of the business process.
Assign Workers to a Matrix Organization	UPDATED Added information about the new Remove Multiple Matrix Members business process.

Tenant Configuration

Reference: Edit Tenant Setup - Financials	UPDATED

	Added information on Additional Discount Days for Supplier Accounts Options.
Reference: Edit Tenant Setup - Financials	UPDATED Added two options in Supplier Options table
Reference: Edit Tenant Setup - HCM	UPDATED In the Compensation section, added information about enabling defaulting based on changes to guidelines for multiple business processes.
Reference: Edit Tenant Setup - HCM	UPDATED • In the Learning section, added information about the Disable AI Summarized Feedback option. • Added information to the Org Chart section.
Reference: Edit Tenant Setup - HCM	UPDATED In the Learning section, added information about the Enable Language Preferences option.
Reference: Edit Tenant Setup - HCM	UPDATED Updated information on the Enable Defaulting Based on Changes to Guidelines tenant option.
Reference: Edit Tenant Setup - Payroll	UPDATED Added Data Entry Check Options section.
Reference: Edit Tenant Setup - Payroll	UPDATED Added information about the Lock Pay Groups To Block All Pay Calculations on Payroll Results check box to the Pay/ Retro Calculations table.
Reference: Edit Tenant Setup - Payroll	UPDATED Added notes to the Payroll Accounting, Payroll Commitments, and Payroll Costing sections regarding the Maintain Payroll Accounting Options task.
Reference: Edit Tenant Setup - Student	UPDATED In the Tenant Options section, added information about the Override Display ID for Student Worktag option.
Reference: Form Completion Assistant	UPDATED

	Added information on time tracking prompts supported by the Form Completion Assistant.
Configure One-Way Messaging for Production Tenant	UPDATED In the Next Steps section, added that brand representatives for private and not-for-profit companies don't receive a two-factor authentication email.
Steps: Set Up Message Builder	NEW How to set up access and security to Message Builder.
Concept: Editing Document Layouts in Docs for Layouts	UPDATED Added information about creating custom conditions for content in document layouts.
Concept: Viewing Document Layout Details in Docs for Layouts	NEW Added a new topic that describes the Document Layout Details report for viewing document layout metadata and deactivating document layouts.
Reference: Supported Data Sources in Docs for Layouts	UPDATED Updated with additional data sources that Docs for Layouts supports.
Concept: Importing Work Schedules	UPDATED Added information to the Context section on retrieving related attributes from imported schedule events.
Setup Considerations: Calculated Fields	UPDATED Updated the **Maintain Calculated Fields** and **Maintain Calculated Fields for Report** descriptions to note that they also now convert calculated fields.
Concept: Exception Audit Reports	UPDATED Added more information in the Security Exception Audit section.
Steps: Migrate Packages with Object Transporter	UPDATED Updated to: • Remove steps that cover initial set up rather than migration. Moved those steps to the Steps: Configure Access to Object Transporter topic. • Add prerequisites to Migrating with Object Transporter

	• Clarify remaining steps.
Add an Instance to a Configuration Package	UPDATED Describes how to add an instance to an existing configuration package.
Reference: Payroll and Object Transporter	UPDATED Provides information for migrating payroll objects using Object Transporter.
Configure Tenant Compare Security	UPDATED Corrected the domain name in step 3 from *OX Web Services* to *Special OX Web Services*.

User Experience

Steps: Set Up Workday Home	UPDATED • Replaced People Experience Workspace report with System Admin report. • Added information about the System Admin report.
Steps: Enable Quick Tasks on Workday Home	UPDATED Replaced People Experience Workspace report with System Admin report.
Steps: Enable Enhanced Tasks and Reports in Search	NEW How to enable enhanced tasks and reports in search.
Concept: People Experience	UPDATED Added new row in the Search table for AI Enhanced Search.
Concept: Home Page Workspace	UPDATED • Added a new row with information about Onboarding Timeline widget in the Settings section. • Replaced People Experience Workspace with System Admin Hub.
Concept: Home Page Cards	UPDATED Added information about the System Admin Hub.
Reference: Manager Experience on the Home Page	UPDATED

	Replaced People Experience Workspace with System Admin report.
Reference: Home Page Sections	UPDATED • Added a row on the Onboarding Timeline widget. • Replaced People Experience Workspace with System Admin Hub.
FAQ: Workday Home	UPDATED Replaced People Experience Workspace report with System Admin report.
Setup Considerations: Journeys	UPDATED Added 2 new rows in the Security section about these 2 new sub-domains: • *Manage: Journey Condition Rules* • *Manage: Journeys Preview*
Steps: Set Up Journeys	UPDATED Added information on the 2 new sub-domains on Step 4.
Concept: Journeys Templates	UPDATED Added 2 new templates: • Supporting Your Parental Leave • Supporting Your Sick Leave
Example: Create and Distribute a Journey	UPDATED Modified Steps 1 through 17 to add more clarity to the topic.
Reference: Sample QuickTips for the Change Job Business Process	NEW Provides sample information for QuickTips for the Change Job Business Process.

February 21, 2025

Tenant Configuration

Concept: Email Ingestion	UPDATED In the Forward and Redirect with Email Ingestion section, added a note explaining that the To field should contain only the forwarding address.

Reference: Integrations and Web Service Limits	UPDATED Updated AS2 file size limit value to 200 MB.
Concept: Configuration Change Tracker	UPDATED • Updated the video. • Clarified the example for using **Configuration Change Tracker**. • Updated the use case for audit trails.
Steps: Configure Access to Object Transporter	NEW How to set up tenant, Customer Central, and security access to Object Transporter.
Steps: Migrate Packages with Object Transporter	UPDATED Updated to: • Remove steps that cover initial set up rather than migration. Moved those steps to the Steps: Configure Access to Object Transporter topic. • Add prerequisites to Migrating with Object Transporter • Clarify remaining steps.
Migrate Packages with Object Transporter	UPDATED Updated steps 7, 8, 9, and 10 to emphasize the importance of reviewing the changes between source and target tenants before you migrate.
Migrate Single Instances with Object Transporter	UPDATED Updated steps 11, 12, 13, and 14 to emphasize the importance of reviewing the changes between source and target tenants before you migrate.
Migrate Configuration Catalog Content with Object Transporter	UPDATED Updated steps 11, 12, 13, and 14 to emphasize the importance of reviewing the changes between source and target tenants before you migrate.
Steps: Translate and Migrate Objects	UPDATED Updated steps 6, 7, and 8 to to emphasize the importance of reviewing the changes between source and target tenants before and after you migrate.
Reference: Best Practices for Migrating Integrations with Object Transporter	UPDATED

	Updated the item about Integration system users (ISU) to include the fact that Workday automatically attaches the ISU to a successfully migrated integration system.
Migrate Configuration Extracts	UPDATED Updated steps 7, 8, 9, and 10 to emphasize the importance of reviewing the changes between source and target tenants before you migrate.
Steps: Set Up Tenant Compare Security and Access	NEW How to set up security and access for the **Tenant Compare** report.
Configure Tenant Compare Security	NEW How to configure security for the **Tenant Compare** report.
Compare Tenant Configuration Data	NEW How to compare configuration data between 2 tenants using the Tenant Compare implementation tool.
Concept: Tenant Compare Report	NEW Describes how the report analyzes and presents configuration data differences. Also contains tips for getting the best results from the report.
Reference: Unavailable Implementation Types in Tenant Comparisons	NEW Information on implementation types that Workday doesn't yet make available in the **Tenant Compare** report.

User Experience

Steps: Enable Quick Tasks on Workday Home	UPDATED Clarified sentence related to the Edit Tenant Setup - Machine Learning task.
Reference: Payroll Cards	UPDATED Updated task and domain names.

February 7, 2025

Tenant Configuration

Reference: Edit Tenant Setup - Financials	UPDATED In the Business Assets Options section, clarified the behavior of the Always Go to Review Trackable Lines for Trackable Spend Category check box and changed the related topic.
Concept: Editing Notification Templates	UPDATED Added information on unrestricted image size to note.
Steps: Manage Access to Documents	UPDATED Updated step 4 to clarify that security groups have precedence over segment based security groups when inheriting permissions.

User Experience

Steps: Enable Intelligent Answers	UPDATED Clarified sentence related to the Edit Tenant Setup - Machine Learning task.

January 24, 2025

Business Processes

Concept: Business Process Management	UPDATED In the Manually Send Back section, added more information and an example about send back.
Schedule Alert Notifications	UPDATED In the Dependency row on Step 4, added more information about the Dependency prompt.

Tenant Configuration

Reference: Edit Tenant Setup - Business Processes	UPDATED Added a new User to perform Orchestration Launches row that describes the field on the task.

Add Documents to Workday	UPDATED Updated the Name field description.
Create and Edit Custom Object Definitions	UPDATED In the Authorized Usage row on Step 5, provided more information about the Authorized Usage prompt.
Create a Step-Based Calculation	UPDATED In step 3, clarified the Type field functionality.
Concept: Object Transporter	UPDATED Updated to reflect expanded capabilities and use cases.

User Experience

Setup Considerations: Journeys	UPDATED Added: • New domain *Manage: Team's Journeys* in the Security section. • Manager Experience web services in the Integrations section.
Troubleshooting: eSignature Integrations	UPDATED Added troubleshooting entry regarding document name character limits.

January 10, 2025

Business Processes

Schedule Alert Notifications	UPDATED In the Context section, added the recommendation of validating alerts, reports, and other processes after migration.

Tenant Configuration

Reference: Edit Tenant Setup - Recruiting	UPDATED Clarified that when you initiate the hire process, Workday automatically populates the worker profile with personal

	information from the candidate's job application. This applies to: • Candidates with records previously merged with contingent or terminated worker records. • Internal candidates. • External candidates, if their job application contains personal information.
Configure and View Alerts	**UPDATED** In the: • Context section, added the recommendation of validating alerts, reports, and other processes after migration. • Next Steps section, added information about suspending active alerts.
Configure Notification Delivery Settings for Email Analytics	**UPDATED** In Steps 2 and 4, clarified that you associate an individual notification type with an email analytics sending domain.
Concept: Editing Notification Templates	**UPDATED** Added a note to include size limits for each language instance of a Notification Designer template.
Steps: Migrate Packages with Object Transporter	**UPDATED** In the Context section, added the recommendation of validating alerts, reports, and other processes after migration.
Create Security Configuration Packages with Object Transporter	**UPDATED** Added note about consequences of removing tenanted security groups.
Migrate Single Instances with Object Transporter	**UPDATED** In the Context section, added the recommendation of validating alerts, reports, and other processes after migration.
Migrate Configuration Catalog Content with Object Transporter	**UPDATED** In the Context section, added the recommendation of validating alerts, reports, and other processes after migration.

December 13, 2024

Business Processes

Concept: Completion Steps	UPDATED Added information about the Complete column once you configure a step as a completion step.
Concept: Approval Chain Routing	UPDATED Added information about step conditions.
Edit Business Processes	UPDATED In the Next Steps section, added a bullet that describes how to configure a step as a completion step.
Configure Business Process System Notifications	UPDATED Expanded the topic to provide more details on configuring system notifications.

Tenant Configuration

Reference: Edit Tenant Setup - Notifications	UPDATED In the General Email Notification Settings and General Notification Restrictions sections, added a note about ensuring that no campaigns or processes are running before you create or update a restriction.
Configure One-Way Messaging for Production Tenant	UPDATED In Step 3, updated list of acceptable file types, and added the task used to specify file types you can upload into Workday.
Steps: Manage Access to Documents	UPDATED Added note that users need access to the Integration Event, Integration Debug, Integration Process, or Integration Build domain in the Integration functional area if document is generated through integration.
Set Up Review Documents Steps	UPDATED Updated Result section to describe Adobe Sign's document merging functionality and refer users to Adobe's documentation.

Reference: Integrations and Web Service Limits	UPDATED Added information about integration processing limits.

User Experience

Concept: Home Page Cards	NEW Added a new topic for easy findability of the Reference: Home Page Cards topics by their product areas.
Setup Considerations: Journeys	UPDATED Added information on: • Category Type web services in the Integrations section. • Manager Experience web services in the Integrations section. • New domain: Manage: Team's Journeys. • Removed task names from the Security section. • Added task names to the Security section. information on Category Type web services in the Integrations section.
Steps: Set Up Journeys	UPDATED • Updated instructions on Step 1 through Step 10 • Removed information pertaining to creating a journey.
Create a Journey in the Journeys Workspace	NEW Created a new topic that explains how to set up a journey in the journeys workspace.

November 29, 2024

User Experience

Concept: Home Page Cards	NEW Added a new topic for easy findability of the Reference: Home Page Cards topics by their product areas.
Setup Considerations: Journeys	UPDATED Added information on: • Category Type web services in the Integrations section. • New domain: Manage: Team's Journeys.

	• Removed task names from the Security section. • Added task names to the Security section. information on Category Type web services in the Integrations section.
Reference: Sample QuickTips for Create Course	NEW Provides sample information for QuickTips for the Create Course task in Workday Learning.
Reference: Sample QuickTips for Create Job Requisition	NEW Provides sample information for QuickTips for the Create Job Requisition task.
Reference: Sample QuickTips for Create Position	NEW Provides sample information for QuickTips for the Create Position task.
Reference: Sample QuickTips for Get Feedback on Self	NEW Provides sample information for QuickTips for the Get Feedback on Self task.
Reference: Sample QuickTips for Give Feedback	NEW Provides sample information for QuickTips for the Give Feedback task.

November 15, 2024

Tenant Configuration

Reference: Edit Tenant Setup - Recruiting	UPDATED Added description for the Hide End Date and Time Left to Apply on Job Postings checkbox.
Reference: Edit Tenant Setup - Security	UPDATED In the SAML Setup table, added a link to the Configure SAML Single Logout topic in the More Information column for the Service Provider ID option.
Reference: Machine Learning Data Contributions	UPDATED

	In the Payroll: Payroll Machine Learning GA Features section, added the new P45 Tax Form Scanning category for Payroll for the UK.
Steps: Set Up Email Analytics	UPDATED In the Context section, removed the note about Email Analytics not being available in Google Cloud Platform environments.
Steps: Set Up Email Ingestion	UPDATED In the Context section, removed the note about Email Ingestion not being available in Google Cloud Platform environments.
Steps: Create Calendars	UPDATED Added a mention of Student in the intro.
Create Holiday Calendars	UPDATED Added info about how holiday calendars affect Student.
Customize Recurrence for Scheduled Processes	NEW How to customize recurrence for scheduled processes.

November 1, 2024

Business Processes

Setup Considerations: Business Processes	UPDATED In the Recommendations section, added information about 72 consecutive, non-manual steps maximum on a business process definition.
Concept: Business Processes	UPDATED In the Business Process Definitions section, added information about 72 consecutive, non-manual steps maximum on a business process definition.
Edit Business Processes	UPDATED In the Context section, added information about 72 consecutive, non-manual steps maximum on a business process definition.

Steps: Configure Questionnaire Security Segments	UPDATED Renamed the domain name Questionnaire Segmented Setup to Set Up: Questionnaire Security Segments to align with domain naming standards
Setup Considerations: Requests	UPDATED Renamed the domain name Requests Segmented Setup to Set Up: Request Type Security Segments to align with domain naming standards
Steps: Maintain Access to Request Types	UPDATED Renamed the domain name Requests Segmented Setup to Set Up: Request Type Security Segments to align with domain naming standards

Tenant Configuration

Reference: Edit Tenant Setup - Notifications	UPDATED In the General Email Notification Settings and General Notification Restrictions sections, clarified the descriptions in the Disable All Notifications and OMS Environment Selected for Restriction rows.
Reference: Edit Tenant Setup - Payroll	UPDATED Added Salary Over the Cap - Allow Grant Worktag in Suballocations to the Payroll Accounting table.
Steps: Set Up Workday Mobile Applications	UPDATED Updated iOS supported versions to 16.0 and higher.
Concept: Mobile Devices and Features	UPDATED Updated iOS supported versions to 16.0 and higher.
Configure One-Way Messaging for Production Tenant	UPDATED In the Next Steps section, added information about the two-factor authentication email sent to the brand representative.
Steps: Manage Access to Documents	UPDATED Renamed the domain name Document Categories Segmented Setup to Set Up: Document Category Security Segments to align with domain naming standards

Setup Considerations: Calculations	**UPDATED** In the Security section, updated the security domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Create Calculations	**UPDATED** In the Prerequisites section, updated the security domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Create Lookup Calculations Using Advanced Lookup Tables	**UPDATED** In the Prerequisites section, updated the security domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Copy Advanced Lookup Tables with New Effective Dates	**UPDATED** In the Prerequisites section, updated the security domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Create a Step-Based Calculation	**UPDATED** In the Prerequisites section, updated domain secuirty for step-based calculations.
Concept: Data Entry in Advanced Lookup Table EIB Spreadsheets	**UPDATED** In the Security section, updated the security domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Example: Set Up an Integration for Advanced Lookup Tables	**UPDATED** In the Prerequisites section, updated the security domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Example: Create Lookup Tables for Job-Specific Values	**UPDATED** In the Prerequisites section, updated the security domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Reference: Date Calculations	**UPDATED**

	In the Security section, updated the security domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Reference: Numeric Calculations	UPDATED In the Security section, updated the security domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Reference: Boolean Calculations	UPDATED In the Security section, updated the security domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Concept: User Activity Logging	UPDATED Added 2 bullet points in the Activity Category section that describe the types of downloads performed.
Create Configuration Packages with Object Transporter	UPDATED Updated Context section with information on how Workday handles objects with effective when you migrate them in a Configuration Package.
Migrate Single Instances with Object Transporter	UPDATED Updated step 8 with clarification on future-dated effetive dates.
Steps: Create Configuration Extracts	UPDATED How and when to create configuration extracts.
Migrate Configuration Extracts	UPDATED How to migrate configuration extracts.
Control Who Migrates Configuration Extracts	UPDATED How to permit Customer Central Users and Administrators to migrate configuration extracts.

User Experience

Reference: Benefits Cards	UPDATED
Reference: Compensation Cards	UPDATED

Reference: Financials Cards	UPDATED
Reference: HCM Cards	UPDATED
Reference: Help Cards	UPDATED
Reference: Inventory Cards	UPDATED
Reference: Learning Cards	UPDATED
Reference: Payroll Cards	UPDATED
Reference: Productivity Cards	UPDATED
Reference: Projects Cards	UPDATED
Reference: Recruiting Cards	UPDATED
Reference: Student Cards	UPDATED
Reference: Talent Cards	UPDATED
Reference: Time Tracking Cards	UPDATED
Reference: Workday Peakon Employee Voice	UPDATED
Troubleshooting: Generated Documents	UPDATED Added issue regarding past effective dates and migration using Object Transporter OX 2.0. Fixed broken anchor links.

October 18, 2024

Business Processes

Steps: Set Up Task Consolidation	UPDATED Added: • An example in the Context section. • Two Administrator Guide topics in the Related Information section.

Create Text Blocks	UPDATED Added note to explain effective dates of text blocks.
Configure Generated Documents	UPDATED Added note regarding effective dates of text boxes and templates.

Tenant Configuration

Enable Innovation Services Feature and Machine Learning Data Contributions	UPDATED Added information on testing ML features to the Next Steps section.
Concept: Workday AI for Universal Main Subscription Agreement Customers	UPDATED Added a section on testing ML features.
Migrate Packages with Object Transporter	UPDATED Updated step 4 with clarification on future-dated effetive dates.
Migrate Configuration Catalog Content with Object Transporter	UPDATED Updated step 8 with clarification on future-dated effetive dates.

October 4, 2024

Business Processes

Concept: Tasks Step	UPDATED Added note regarding internal tasks displaying in the Audit Trail Report.
Steps: Enable Attachments on an Individual Business Process	UPDATED Made edits for depth and clarity throughout to address customer feedback. Relocated topic to a new Concept: Business Process Step Attachments topic.
Concept: Business Process Step Attachments	UPDATED New topic to address customer feedback on BP step attachment topics.

Organizations

Setup Considerations: Organizations	UPDATED Added the Assign Multiple Matrix Members business process.
Steps: Set Up Matrix Organization Business Processes	NEW How to set up the Assign Matrix Organization and the Assign Multiple Matrix Members business processes.
Assign Workers to a Matrix Organization	UPDATED Added information about the Assign Multiple Matrix Members business process.

Tenant Configuration

Reference: Edit Tenant Setup - Notifications	UPDATED Clarified the description in the Disable all Notifications row of the General Email Notification Settings and General Notification Restrictions sections.
Reference: Edit Tenant Setup - Payroll	UPDATED Added Maximum Months Allowed For Terminated Worker Retro Processing to the Pay/Retro Calculations table.
Concept: Mobile Devices and Features	UPDATED Added a new row to the Feature Availability table to include Requests.
Reference: Machine Learning Data Contributions	UPDATED In the Payroll: Payroll Machine Learning GA Features section, updated feature name from Payroll Insights to Pay Anomalies.
Steps: Set Up Workday Messaging	UPDATED Removed Candidate SMS Messages from the Recruiting notification types in Step 8.
Convert Text to Number	UPDATED In the Decimal Separator row of Step 3, clarified how Workday computes values for regions that use commas as decimal separators.

User Experience

Concept: Journeys Workspace	UPDATED Removed Journeys Templates section from the topic.

September 20, 2024

Business Processes

Concept: Time Zone and Due Date	NEW Describes the concept of time zone and due date for business process steps
Reference: Actions Available on Business Processes	UPDATED Expanded the Deny row to provide additional information on when you can perform the action.
Steps: Configure Business Process Definitions	UPDATED Expanded step 11 to provide additional information about configuring help text.
Edit Business Processes	UPDATED Expanded these rows to provide more information on a step's due date and time zone: • Due Date • Due Date Is Based On Effective Date
Set Up Mass Operations	UPDATED Added Redirect Inbox Items to list of MOM types in table.
Setup Considerations: Delegation	UPDATED Expanded the Tenant Setup section to provide more information about the Apply Routing Restrictions during Delegation check box.
Set Up Request Types	UPDATED Added Restrict Questionnaire Responses row to table.

Organizations

Setup Considerations: Org Studio and Mass Actions	UPDATED Updated the Recommendations section with information on the recommended amount of transactions in a design for the best experience.

Roles

Set Up Role-Based Security Reporting	UPDATED Illustrates how to set up the Role-Based Security Audit report.

Tenant Configuration

Reference: Edit Tenant Setup - Business Processes	UPDATED In the: • Apply Routing Restrictions during Delegation row, added information about clearing the check box. • Authenticate with Adobe row, changed Adobe EchoSign to Adobe Sign in the first sentence below the bullets.
Reference: Edit Tenant Setup - Financials	UPDATED Updated the Enable Dynamic Supplier Payment Date prompt description in the Settlement and Bank Account Options section with a description of the new Apply Supplier Credit Adjustments to First Payment Due check box.
Reference: Edit Tenant Setup - Financials	UPDATED
Reference: Edit Tenant Setup - Financials	UPDATED • Updated the Tax Options section with a description of the new Enable Address Level Tax Details check box. • Added a new Cash Basis Accounting section and related information.
Reference: Edit Tenant Setup - HCM	UPDATED Added new option under Time Tracking for the Effective Date Support for Midweek Changes in Time Calculations feature.
Reference: Edit Tenant Setup - HCM	UPDATED Added Data Entry Check section.

Reference: Edit Tenant Setup - Help	UPDATED • Added information about disabling AI features for Knowledge Management. • Added information about the information message setting on the Create Case task. • Added information about the setting to enable case owners to reopen closed cases.
Reference: Edit Tenant Setup - Payroll	UPDATED Added Display Costing Allocation Event Number to Payroll Costing table.
Reference: Edit Tenant Setup - Payroll	UPDATED Added the new Arrears section for the Arrears balances for employee self service feature.
Reference: Edit Tenant Setup - Payroll	UPDATED Added two new rows to Payroll Accounting table to include Allocate Net Pay Liability based on earning proration and Allocate Net Pay Liability - Exclude Negative Result Lines.
Reference: Edit Tenant Setup - Payroll	UPDATED In the Pay/Retro Calculations > Retro Calculations - USA section, added a row the Enable Taxes on Retro Amounts from Prior Tax Authorities check box for Payroll for the U.S.
Reference: Edit Tenant Setup - System	UPDATED • Renamed the Enable Blue Primary Buttons option in the Information section to Disable Blue Primary Buttons, which changes blue buttons back to orange. • Removed note that Time Zone opt-in isn't reversible.
Concept: Mobile Devices and Features	UPDATED Updated the table in the Feature Availability section to include new functionality for Help.
Reference: Absence Management Features in Workday Mobile	UPDATED Added the Buy Time Off feature to the grid.
Reference: Time Tracking and Scheduling Features in Workday Mobile	UPDATED Added a row to the table for Daily Time Exceptions.

Reference: Form Completion Assistant	UPDATED Added information on payroll prompts supported by the Form Completion Assistant.
Reference: Form Completion Assistant	UPDATED Provides additional information on prompts supported by Form Completion Assistant.
Steps: Set Up Customer-Provided Receiving Domains	UPDATED Added: • In the Context section, a recommendation to work with an IT administrator when setting up a customer-provided receiving domain. • In Step 1a, details to consider when entering the subdomain and domain. • In Step 3, information on next steps if you're unable to verify your receiving domain successfully.
Setup Considerations: Workday Messaging	UPDATED Added: • Benefits, Expenses, and Student as product areas that use Workday Messaging in the What It Is section. • Use cases for Benefits, Expenses, and Student in the Use Cases section. • Workday Messaging support for Australia to the Limitations section.
Steps: Set Up Workday Messaging	UPDATED Added: • The requirement to comply with A2P 10DLC campaign approval requirements to the Prerequisites section. • Workday Messaging support for Australia to the Context section. • Notification types for Benefits, Expenses, and Student in Step 8.
Configure One-Way Messaging for Production Tenant	UPDATED Added Workday Messaging support for Australia to the Context section and to Step 3.
Concept: Workday Messaging U.S. Configuration	UPDATED Updated the Privacy Policy Guidelines section for clarity.

Reference: Core Navigation	UPDATED • Described global navigation menu categories in detail in the Menu section. • Added a sentence on how the top 4 apps display on the Workday Home page.
Steps: Manage Access to Documents	UPDATED Updated Results section for clarity. Edited domain names to remove BIRT, per DOCENG updates.
Format Text	UPDATED In Step 4, added the Replace Delimiter option that enables you to remove or replace special characters and delimiters from text fields.
Reference: Calculated Field Functions	UPDATED In the Format Text row, added the Replace Delimiter option that enables you to remove or replace special characters and delimiters in text fields.
Setup Considerations: Calculations	UPDATED In the Questions to Consider, Requirements, and Security sections; updated information on segment-based security for calculations.
Create Calculations	UPDATED In the Prerequisites section, updated domain security for calculations.
Create Lookup Calculations Using Advanced Lookup Tables	UPDATED In the Prerequisites section, updated domain security for lookup calculations.
Copy Advanced Lookup Tables with New Effective Dates	UPDATED In the Prerequisites section, updated domain security for advanced lookup tables.
Concept: Data Entry in Advanced Lookup Table EIB Spreadsheets	UPDATED Updated domain security for advanced lookup tables using EIB spreadsheets.
Example: Set Up an Integration for Advanced Lookup Tables	UPDATED

	In the Prerequisites section, updated domain security for advanced lookup tables for integration.
Example: Create Lookup Tables for Job-Specific Values	UPDATED In the Prerequisites section, updated domain security for lookup tables.
Reference: Date Calculations	UPDATED Updated domain security for date calculations.
Reference: Numeric Calculations	UPDATED Updated domain security for numeric calculations.
Reference: Boolean Calculations	UPDATED Updated domain security for boolean calculations.
Reference: Reporting Limits	UPDATED In the: • Scheduled Report Output section, added the View in Browser Output Type option for composite reports. • Reports Run in the Browser section, added the report result limitation for composite reports that use View in Browser.
Reference: Integrations and Web Service Limits	UPDATED Added information about API request caching.
Setup Considerations: Customer Central	UPDATED Renamed Object Transporter 2.0 to Object Transporter.
Concept: Customer Central	UPDATED Renamed Object Transporter 2.0 to Object Transporter.
Concept: Configuration Catalog	UPDATED Renamed Object Transporter 2.0 to Object Transporter.
Steps: Set Up Customer Central Accounts	UPDATED Renamed Object Transporter 2.0 to Object Transporter.
Create Customer Central Administrator Accounts	UPDATED

	Renamed Object Transporter 2.0 to Object Transporter.
Create Customer Central User Accounts	UPDATED Renamed Object Transporter 2.0 to Object Transporter.
Concept: Customer Central Users	UPDATED • Renamed Object Transporter 2.0 to Object Transporter. • Added the Configuration Change Tracker report for Customer Central Users and Administrators.
Provide Tenant Access to Customer Central Users	UPDATED Renamed Object Transporter 2.0 to Object Transporter.
Create Customer Central Sessions	UPDATED Renamed Object Transporter 2.0 to Object Transporter.
Concept: Object Transporter	UPDATED Renamed Object Transporter 2.0 to Object Transporter.
Steps: Migrate Packages with Object Transporter	UPDATED Renamed Object Transporter 2.0 to Object Transporter.
Configure Object Transporter Security Permissions	UPDATED Renamed Object Transporter 2.0 to Object Transporter.
Create Configuration Packages with Object Transporter	UPDATED Renamed Object Transporter 2.0 to Object Transporter.
Create Security Configuration Packages with Object Transporter	UPDATED Renamed Object Transporter 2.0 to Object Transporter.
Migrate Packages with Object Transporter	UPDATED • Renamed Object Transporter 2.0 to Object Transporter. • Updated Context section with note about how Object Transporter migrates the current version of objects. Adding objects to a package doesn't freeze them in time.
Migrate Single Instances with Object Transporter	UPDATED • Renamed Object Transporter 2.0 to Object Transporter.

	• Updated Context section with note about how Object Transporter migrates the current version of objects.
Migrate Configuration Catalog Content with Object Transporter	UPDATED • Renamed Object Transporter 2.0 to Object Transporter. • Updated Context section with note about how Object Transporter migrates the current version of objects. Adding objects to a catalog doesn't freeze them in time.
Migrate Configuration Catalog Content with Object Transporter	UPDATED Renamed Object Transporter 2.0 to Object Transporter.
Restrict Who Can Migrate with Object Transporter	UPDATED Renamed Object Transporter to Object Transporter.
Steps: Translate and Migrate Objects	UPDATED Renamed Object Transporter 2.0 to Object Transporter.
Steps: Translate and Migrate Objects	UPDATED Renamed Object Transporter 2.0 to Object Transporter.
Reference: Best Practices for Migrating Integrations with Object Transporter	UPDATED Renamed Object Transporter 2.0 to Object Transporter.
FAQ: Migrating Translations	UPDATED Renamed Object Transporter 2.0 to Object Transporter.

User Experience

Steps: Enable Quick Tasks on Workday Home	UPDATED Added more detail to Step 1 to demonstrate how to access and select the checkbox to opt-in to Workday-Generated User Information.
Steps: Set Up Enterprise Search	UPDATED • Removed the step for accessing the Edit Tenant Setup - Machine Learning task. • Added instructions for configuring the Search Insights dashboard.
Concept: People Experience	UPDATED

	• Added Learning as a new default search category in the Search table. • Added a new row in the Search table for AI Enhanced Search. • Removed the rows for Related Tasks and Suggested Results in the Search table.
Concept: Enterprise Search	UPDATED Added information about the new Search Insights dashboard and delivered reports.
Reference: Payroll Cards	UPDATED Added cards for UK pension re-enrolment reminder and UK P60 tax form.
Reference: Student Cards	UPDATED For accuracy and clarity: • Renamed the Registration Appointment is Approaching card to Registration Appointment Starting Soon. • Added new information on when and how the Registration Appointment Starting Soon and Registration Appointment is Open cards display.
Setup Considerations: Journeys	UPDATED Added information on silencing Workday-delivered journey notifications in the Recommendations section.
Concept: Journeys	UPDATED Added a section on journey category types.
Concept: Journeys Workspace	UPDATED Added: • Offboarding template in the Journeys Templates section. • Fueling Your Career, Job Translation, and Relocation templates in the Journeys Templates section. • Glossary items in the Journey Details section. • Links in the Resources icon.
Concept: Journeys Templates	NEW Created a new topic.
Steps: Set Up and Manage Journeys Category Types	NEW Added a new topic on journey category types.

Concept: Guidance Workspace	UPDATED Added Legal Notice.
Troubleshooting: Generated Documents	UPDATED Removed BIRT from domain names: • 'Worker Data: View Generated BIRT documents' to 'Worker Data: View Generated Documents' 'Self-Service: View Generated BIRT documents' to 'Self-Service: View Generated Documents'

Payroll

March 14, 2025

Compliance

Concept: Statutory Compliance (UK)	UPDATED In the Statutory Payments section, added support for Statutory Neonatal Care Pay (SNCP).

DSN Reporting (FRA)

Define Nonmonthly Reference Periods for Reported Bonuses (FRA)	UPDATED Updated related calculations for this task.
Reference: DSN Verification Reports (FRA)	UPDATED Updated FRA AER List Termination Statements information.

Earnings, Deductions, and Other Calculations

Setup Considerations: Payroll Proration	UPDATED Updated all topics in the Proration section to clarify country-specific functionality.
Setup Considerations: Flexible Payment and Deduction Options	UPDATED Updated all topics in the Flexible Payment and Deduction Options section to clarify country-specific functionality.

Steps: Set Up Termination Pay (AUS)	UPDATED Removed note about Payroll for Australia not calculating ETP tax.
Map Termination Reasons to ATO Cessation Types (AUS)	UPDATED Added information about the PCRCs, and added information in the steps about the invalidity reason checkbox.
Create Termination Payments (AUS)	UPDATED Removed information about manual calculations, because Workday now calculates ETP tax for Australia.

Labor Costing

Set Up Retro Costing for Payroll Accounting	UPDATED Replaced references to Maintain Payroll Retro Accounting Options with Maintain Payroll Accounting Options.
Concept: Allocate Net Pay Liability Based on Earning Proration	UPDATED Updated to include intercompany in addition to interwortag. Also updated the Note to include the updated information. Removed Single Company Pay Results.
Define Salary Over the Cap Costing Allocations for a Worker	UPDATED Changed the title of the topic and added steps about specifying default and override Salary Over the Cap costing allocations.

Pay Anomalies

Steps: Set Up Machine Learning for Pay Anomalies	UPDATED Added information about which Payroll countries can use the Pay Anomalies report.
Examine Pay Anomalies	UPDATED Updated information about the Tag Results button in Step 4.

Payroll Accounting Setup

Setup Considerations: Payroll Forward Accruals	UPDATED

	Replaced references to Maintain Payroll Forward Accrual Options with Maintain Payroll Accounting Options.

Payroll Considerations

Setup Considerations: Time Off Calculations for Payroll	UPDATED Added the My Time Off Results by Period and Time Off Results by Period for Workers reports.

Payroll Input

Setup Considerations: Payroll Input	UPDATED In the Questions to Consider and Business Processes sections, added information on the Request Payroll Inputs business process.
Steps: Set Up Payroll Input	UPDATED Added a bullet in Step 3 to include information on the Request Payroll Inputs business process.
Steps: Set Up Request Payroll Inputs Business Process	NEW How to set up the Request Payroll Inputs business process.
FAQ: Payroll Input	UPDATED Clarified when you can delete payroll inputs by batch.

Payroll Processing

Setup Considerations: On-Cycle Payroll Processing	UPDATED In the Reporting section, added the Payroll Pay Group Summary and Payroll Pay Component Summary reports.
Steps: Process Payroll	UPDATED Added lock pay group for auditing to Step 6.
Steps: Set Up Pay Group Lock for Auditing	NEW How to set up pay group lock for auditing.
Calculate On-Cycle Payroll	UPDATED

	In step 1, clarified that you can refine searches for periods and pay groups.
Cancel Pay Calculation	UPDATED In steps 2 and 3, clarified search capabilities for Period and Pay Run Group and/or Pay Group Details prompts.
Concept: Pay Group Lock Status	NEW Describes the concept of pay group lock status.
Setup Considerations: On-Demand Payments	UPDATED Added to the limitations section about adding attachments to pay inputs that are directly entered on an on-demand payment.

Payroll and Accounting Results

Setup Considerations: Payroll Accounting Adjustments	UPDATED Replaced references to Maintain Payroll Retro Accounting Options with Maintain Payroll Accounting Options.

Payslips

Setup Considerations: Payslips	UPDATED In the Questions to Consider section, added a question about payslip timing visibility. In the Integrations section, added information about overriding the default time that payslips are visible.

Real Time Information (RTI) Reporting (UK)

Steps: Set Up Real Time Information Reporting (UK)	UPDATED Added step 5 for Freeport address reporting.
FAQ: Real Time Information Reporting (UK)	UPDATED Amended question on pension and lump sum report warnings.

Retroactive Payroll

Calculate Retro Payroll	UPDATED

	Added a row for Comma Separated Employee IDs to the table in step 2.
Concept: Retro Payroll Accounting	UPDATED Replaced references to Maintain Payroll Retro Accounting Options with Maintain Payroll Accounting Options.

Set Up Payroll Processing

Concept: Intelligent Prompt Recommendations for Payroll	UPDATED Added information on pay calculations using intelligent prompt recommendations.
Concept: Intelligent Prompt Recommendations for Payroll	NEW Describes the concept of machine learning prompt recommendations in payroll and details how to opt out of them. This topic replaces Set Up Intelligent Prompt Recommendations for Payroll.
Setup Considerations: Pay for Terminated Workers	UPDATED Removed Payroll for Australia limitation: non-calculation of employee termination payment tax.
Set Up Payroll and Time Tracking Period Schedules	UPDATED Added steps under Payment Date Auto-Adjust for payment dates that fall on weekends or holidays to a weekday.
Set Up Payroll and Time Tracking Period Schedules	UPDATED Added the Allow Transfers Within Closed Time Entry Periods option that enables users to transfer project time blocks in closed time entry periods.
Set Up Payroll and Time Tracking Period Schedules	UPDATED Replaced references to Maintain Payroll Forward Accrual Options with Maintain Payroll Accounting Options.
Generate Periods for Period Schedules	NEW Added information on the Adjusted Payment Date column.

Statutory Payments (UK)

Steps: Set Up Statutory Leave Payments (UK)	UPDATED

	Added Statutory Neonatal Care Pay details.
Create Statutory Leave Types for UK Payroll	UPDATED Added Statutory Neonatal Care Pay details.

Superannuation (AUS)

Superannuation and Single Touch Payroll (AUS)	UPDATED Added the new Bonus pay component group to the table, and updated the name of the Regular pay component group.

Tax Setup (UK)

Import P45 Tax Data Using Machine Learning (UK)	UPDATED Note added regarding European and U.S. tenant or instance hosting.
Transfer a Worker Between Related Companies (UK)	UPDATED Expanded the related company information in the Prerequisites section.

Tax Setup (USA)

Set Up Union Rates for Paid Family and Medical Leave (USA)	UPDATED Added a note to the Results section about when a worker belongs to multiple unions for the same company and you set up union override rates for multiple unions for that worker.

Year-End Tax Reporting

Publish Year-End Tax Correction Forms to Self-Service (USA)	UPDATED Updated the availability date UI names.

February 21, 2025

Compliance

Reference: Payroll Compliance Updates Dashboard	UPDATED Updated topics in the Compliance section to clarify country-specific functionality.

Payroll Accounting Setup

Setup Considerations: Payroll Accounting	UPDATED Updated all topics in the Payroll Accounting Setup section to clarify country-specific functionality.

Payroll Considerations

Setup Considerations: Payroll and Benefits	UPDATED Updated all topics in the Payroll Considerations section to clarify country-specific functionality.

Payroll and Accounting Results

Setup Considerations: Payroll Audits	UPDATED Updated all topics in the Payroll and Accounting Results section to clarify country-specific functionality.
Reference: Payroll Register Reports	UPDATED Added missing security domains for Deduction and Earning Registers.

Set Up Payroll Processing

Setup Considerations: Payroll Dashboards	UPDATED Updated all topics in the Set Up Payroll Processing section to clarify country-specific functionality.

Tax Setup (USA)

Steps: Track Workers Compensation (USA)	UPDATED In the Context section, expanded the information about how Payroll for the U.S. tracks workers compensation.
Map Earnings and Deductions to W-2 Boxes (USA)	UPDATED In the Context section, clarified that only pay components or pay component-related calculations can be mapped to year-end forms.
Map Earnings and Deductions to Year-End Forms for U.S. Territories (USA)	UPDATED

	In the Context section, clarified that only pay components or pay component-related calculations can be mapped to year-end forms.
Reference: Year-End Form Boxes to Be Mapped (USA)	UPDATED Clarified that only pay components or pay component-related calculations can be mapped to year-end forms.

Withholding Orders

Create Deduction Recipient	UPDATED Updated all topics in the Withholding Orders section to clarify country-specific functionality.

February 7, 2025

Gender Pay Gap (UK)

Troubleshooting: Gender Pay Gap Earnings Don't Appear in Correct Report	UPDATED Added step 2 about run category pay components.

January 24, 2025

Earnings, Deductions, and Other Calculations

Process a Manual Payment for Third-Party Sick Pay (USA)	UPDATED Updated the Example section to provide clarification on third-party sick pay.

January 10, 2025

Compliance

Concept: Statutory Compliance (CAN)	UPDATED In the Province Taxes section, clarified that the provincial education and health taxes exclude TD1-IN exempt wages.

International Assignment Pay

Steps: Set Up International Assignment Pay (CAN, USA)	UPDATED Updated to clarify country-specific functionality.

Multiple Jobs

Setup Considerations: Payroll for Multiple Jobs	UPDATED Updated all topics in the Multiple Jobs section to clarify country-specific functionality.

Net Pay Validation and Arrears

Setup Considerations: Net Pay Validation and Arrears	UPDATED Updated all topics in the Net Pay Validation and Arrears section to clarify country-specific functionality.

Payroll Processing

Troubleshooting: Payroll Tax Calculations (CAN)	UPDATED In Payroll results report zero health tax, clarified in the table that TD1-IN wages are excluded.

Tax Setup (CAN)

Set Up Company Province and Territory Taxes (CAN)	UPDATED In step 3, clarified that the provincial education and health taxes exclude TD1-IN exempt wages.

December 13, 2024

DSN Reporting (FRA)

Concept: DSN Manual Entry (FRA)	UPDATED Describes the concept of DSN Manual Entry for Payroll for France.

Earnings, Deductions, and Other Calculations

Set Up Pay Component Related Calculations	**UPDATED** In step 2, clarified related calculation functionality. In step 4, clarified the Limit Filter Worktags functionality.
Map Earnings to Compensation Elements	**UPDATED** In the prerequisite section, updated relevant links. In the context section, clarified the context of mapping earnings to compensation elements.
Concept: Delete Calculations	**UPDATED** In the Considerations for Earnings and Deductions section, clarified information on deleting pay components.
Example: Create a Lookup Table for Cost of Living Percentages	**UPDATED** On Step 4, clarified the instruction to remove the first row in the grid. Expanded the Next Steps section to include step-based conditions.
Setup Considerations: Payroll Processing for the Fair Labor Standards Act (FLSA)	**UPDATED** In the Recommendations section, clarified information on upadating FLSA pay components.

Pay Anomalies

FAQ: Pay Anomalies	**UPDATED** Added an FAQ on testing Pay Anomalies feature.

Payroll Commitments

Configure Payroll Commitment Options	**UPDATED** In the Context section, added information about how Workday prorates and liquidates commitment balances in pay periods that cross fiscal years.
Concept: Multiyear Commitments	**UPDATED** In the Liquidating Multiyear Commitments section, added information about how Workday prorates and liquidates commitment balances in pay periods that cross fiscal years.

Concept: Fiscal Year Proration with HCM Event	UPDATED Added information about how Workday prorates and liquidates commitment balances in pay periods that cross fiscal years.

Payslips

Setup Considerations: Payslips	UPDATED Updated all topics in the Payslips section to clarify country-specific functionality.
Define Payslips (FRA)	UPDATED How to define payslips for Payroll for France. This new topic doesn't reflect any change in Workday features, and is part of a documentation update to clarify country-specific functionality.

Quarterly Tax Reporting (USA)

Create Codes for Quarterly Tax Reporting (USA)	UPDATED Expanded the Next Steps section to provide more information about the Tax Filing Quarterly Data for Workers report.

Retroactive Payroll

Concept: Cancel a Completed Retro Pay Calculation	UPDATED Clarified how to cancel retro results completed at different times in reverse order.

Tax Setup (UK)

Import P45 Tax Data Using Machine Learning (UK)	UPDATED In step 1, replaced the original innovation service name with the new P45 Tax Form Scanning name.

Year-End Tax Reporting

Reference: Payroll Year-End Dashboard	UPDATED Added information about companies in company relationships.

November 15, 2024

Net Pay Validation and Arrears

Define Deduction Priorities and Arrears Handling	UPDATED Claried information about the Do Not Take Partial Deduction check box when a limit is defined on the deduction.

Payroll Input

Add Payroll Input for Workers	UPDATED On Step 6, added a row that describes payroll attachments.

Payroll Processing

Reference: Reports for Post-Payroll	UPDATED In the table, added the PIER Exception Report - CPP2/QPP2.

Payroll Third-Party Payments

Concept: Payroll Third-Party Payable Items	UPDATED Added note about recalculating payroll results with a payroll third-party payable item.

Payroll and Accounting Results

Setup Considerations: Payroll Accounting Adjustments	UPDATED Added information to the Requirements section explaining that creating a payroll accounting adjustment for a worker when payroll isn't complete for their pay group results in the pay period being unavailable on the Create Payroll Accounting Adjustment task.
Setup Considerations: Payroll Accounting Adjustments	UPDATED In the Limitations section, explained that adding position-based account posting rules to your tenant after the entry moment of a payroll accounting adjustment might result in the adjustment posting to an incorrect account.
Create Payroll Accounting Adjustments	UPDATED

	Added a note in step 3 about steps to take if the pay period you want to select is unavailable.

Retroactive Payroll

Setup Considerations: Retroactive Pay Processing	UPDATED Added a recommendation about how to configure your tenant if you support future dated retro hires for Payroll for the UK.
Steps: Set Up Retro Processing	UPDATED In the Next Steps section, added information about how to configure your tenant if you support future dated retro hires for Payroll for the UK.

Set Up Payroll Processing

Set Up Payroll and Time Tracking Period Schedules	UPDATED Updated the Accounting Date Override row of the table in step 1 to clarify the date limits for override values.

Tax Setup (UK)

Steps: Set Up Payroll Taxes (UK)	UPDATED Added optional step 5 to use Workday's machine learning abilities to read UK P45 tax data through optical character recognition.
Import P45 Tax Data Using Machine Learning (UK)	NEW How to use Workday's machine learning abilities to import UK P45 tax data through optical character recognition.
Set Up Worker Taxes (UK)	UPDATED Added a note to the final Prerequisites list item to mention that tax details might be prepopulated from the **Apply UK New Hire Tax Details** task.

Tax Setup (USA)

Maintain Tax Treaty Information for a Worker (USA)	UPDATED In Step 2, expanded the table to provide more information about the Treaty Benefit State Date and Treaty Benefit End Date fields.

Worker Tax Elections (USA)

Add Worker State Tax Elections (USA)	UPDATED In the Next Steps section, clarified what actions you can take on employee tax elections.

Year-End Tax Reporting

Setup Considerations: Year-End Tax Reporting (CAN)	UPDATED In the Reporting section, added the CPP2/QPP2 PIER Exception Report to the list.
Reference: Payroll Year-End Dashboard	UPDATED In the Audit section, added the PIER Exception Report - CPP2/QPP2.
Steps: Set Up, Audit, and Print Year-End Tax Forms (CAN)	UPDATED In step 3, added CPP2 and QPP2 as PIER exception auditing options.
Steps: Set Up, Audit, and Print Year-End Corrections (CAN)	UPDATED In step 3, added CPP2 and QPP2 as PIER exception auditing options.
Audit PIER Exceptions	UPDATED In Step 1, added the new CPP2/QPP2 PIER Exception Report to the list of options.

November 1, 2024

Setup Considerations: Payroll	UPDATED Added information about segment-based security groups to the Security section.

Earnings, Deductions, and Other Calculations

Map Earnings to Compensation Elements	UPDATED In the prerequisite section, included links to helpful topics.

International Assignment Pay

Steps: Set Up International Assignment Pay (CAN, USA)	UPDATED Added a note about Workday Payroll for Australia not supporting international assignments.

Labor Costing

Setup Considerations: Salary Over the Cap	UPDATED To the Questions to Consider section, added information about configuring alternate salary over the cap costing. To the Reporting section, added a note about the Salary Over the Cap Audit report.
Define Salary Over the Cap Costing Allocations for a Worker	NEW How to set up Salary Over the Cap suballocations to additional grants.
Concept: Salary Over Cap Costing	UPDATED Added information about the Salary Over the Cap Basis worktag.

Payroll Processing

Put a Worker's Pay on Hold	UPDATED In the Context section, added information about reasons why you can't put a result on hold.
Complete Payroll	UPDATED In Step 4, clarified information about the On-cycle/Off-cycle field.
Cancel Completed Off-Cycle Payroll	UPDATED In Step 3, clarified information about the Off-cycle Result drop-down list.

Quarterly Tax Reporting (USA)

Create Codes for Quarterly Tax Reporting (USA)	UPDATED Added the RITA Working from Home Indicator reporting type.

Assign Codes for Quarterly Tax Reporting to Workers (USA)	UPDATED Added the RITA Working from Home Indicator reporting type.

Superannuation (AUS)

Setup Considerations: Superannuation (AUS)	UPDATED Added the item to opt into the time zone functionality feature in the Requirements section.

Withholding Orders

Create Deduction Recipient	UPDATED Added information about categories and deleting a deduction recipient.

Withholding Orders (AUS)

Record a Child Support or Section 72A Withholding Order (AUS)	UPDATED Added the Entry Type row to the table, and a note about editing and deleting.
Record a Court Order (AUS)	UPDATED Added the Entry Type row to the table, and a note about editing and deleting.

October 18, 2024

Earnings, Deductions, and Other Calculations

Example: Create a Step-Based Calculation for a 401(k) Employer Match Amount (USA)	UPDATED Updated the step numbers on the table to accurately reflect the step numbers on the task.

Labor Costing

Define Cost Allocations for Employer-Paid Expenses	UPDATED Added a note to step 1 about regarding costing allocations and Workday-owned employer paid expenses.

Net Pay Validation and Arrears

Define Deduction Priorities and Arrears Handling	UPDATED Added a note about options for processing arrears when a worker is on leave.

Payroll Input

Steps: Set Up End Payroll Inputs for Terminated Workers	UPDATED In the Context section, added that you must manually override the end date for terminations that occur prior to the end date of the current pay period using the Edit Payroll Input task.

Payroll Processing

Override Worktags for Manual Payments	UPDATED Added a table to step 4 to provide more context.

Payroll and Accounting Results

Reference: Verification Reports for Payroll Results	UPDATED Added a note about the Not Last Completed section for the Pay Calculation Processing Report.

Set Up Payroll Processing

Example: Add Payroll Cutoff Dates to Pay Periods	UPDATED In Step 1, updated the name of the task to View Period Schedules.

Year-End Tax Reporting

Steps: Set Up, Audit, and Print Year-End Tax Forms (CAN)	UPDATED In step 2, added QPP and QPP2 Taxable Wages (no contribution) to report Box G-1 wages.
Steps: Set Up, Audit, and Print Year-End Corrections (CAN)	UPDATED In step 2, added QPP and QPP2 Taxable Wages (no contribution) to report Box G-1 wages on the RL-1 form.

October 4, 2024

Earnings, Deductions, and Other Calculations

Set Up Pay Component Related Calculations	UPDATED Added a note to the Context section explaining how to display hours on the Actuals tab of a pay result.

Net Pay Validation and Arrears

Define Deduction Priorities and Arrears Handling	UPDATED Added clarification about the 'Do Not Take Partial Deduction' option.

Payroll and Accounting Results

View Payroll Results	UPDATED In the Next Steps section, added information explaining how to display a worker's hours on the Actuals tab of their pay result.

September 20, 2024

DSN Reporting (FRA)

Reference: Payroll Inputs for DSN Reporting (FRA)	UPDATED Added payroll component related calculations to the Vested free shares information.
FAQ: DSN Reporting (FRA)	UPDATED Updated information about a rejected DSN submission file.

Earnings, Deductions, and Other Calculations

Setup Considerations: Earnings and Deductions	UPDATED Updated domain security name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic.
Create Pay Component Groups	UPDATED

	In Step 2, added information about the Target Single Subperiod for a Prorated Pay Component check box.
Create Related Calculations	UPDATED Updated domain security name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic.
Setup Considerations: Payroll Proration	UPDATED • In the Questions to Consider section, added information about the Target Single Subperiod for a Prorated Pay Component check box. • In the Limitations section, removed the limitation on pay components referencing other pay components.
Concept: Payroll Input and Proration	UPDATED Added Add Payroll Input to the list of payroll input tasks that don't cause proration. Expanded the Ongoing row to provide information on terminated workers.
Concept: Pay Component Proration Calculation	NEW Describes the concept of pay component proration calculation.
Steps: Create Custom Fields for Payroll and Absence Calculations	UPDATED Updated domain security name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic.
Example: Calculate Worker Age as of July	UPDATED Updated domain security name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic.
Example: Create a Step-Based Calculation for Bonuses Based on Cost of Living	UPDATED Updated domain security name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic.
Create Pay Accumulations	UPDATED In Step 2, added information about the Target Single Subperiod for a Prorated Pay Component check box.
Setup Considerations: Pay Balances	UPDATED Updated domain security name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic.

Setup Considerations: Payroll Processing for the Fair Labor Standards Act (FLSA)	UPDATED Added a limitation on Buy Time Off.
Example: Calculate Hours Not Worked	UPDATED Updated domain security name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic.
Example: Create Related Calculations to Track Worked Hours	UPDATED Updated domain security name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic.
Create Termination Payments (AUS)	UPDATED Added AUS Normal Gross for Marginal Tax to the pay component group table.

Holiday Pay (UK)

Setup Considerations: Statutory Holiday Pay (UK)	UPDATED In the Questions to Consider section, added information about the possible need to have a separate configuration for Northern Ireland workers.
Steps: Set Up Statutory Holiday Pay (UK)	UPDATED Enhanced step 10 to include the Northern Ireland Reference Period check box.

International Assignment Pay

Steps: Set Up International Assignment Pay (CAN, USA)	UPDATED Added a note about Workday Payroll for France and Workday Payroll for the UK not supporting international assignments.

Labor Costing

Steps: Set Up Labor Costing	UPDATED Added Display Costing Allocation Event Number to step 7.
Steps: Set Up Labor Costing	UPDATED Added new step d and eto Step 7 related to Allocate New Pay.

Concept: Allocation of Payroll Costs	UPDATED Renamed organization assignment defaults to Default Organizational Assignments.

Net Pay Validation and Arrears

Enable Workers to View Arrears Balances	UPDATED Provides instructions on how to enable workers to view their own arrears balances.
Concept: Arrears Processing	UPDATED In the Arrears Reporting section, added the Most Recent Arrears Transaction for Worker report field.

Pay Anomalies

Steps: Set Up Machine Learning for Pay Anomalies	UPDATED Update feature name from Payroll Insights to Pay Anomalies.
Examine Pay Anomalies	UPDATED Updated feature name from Payroll Insights to Pay Anomalies. Clarified information about Saved Searches on the report.
Concept: Payroll Result Abnormalities	UPDATED Updated feature name from Payroll Insights to Pay Anomalies.
FAQ: Pay Anomalies	NEW Answers frequently asked questions about Pay Anomalies.

Payroll Accounting Setup

Reference: Worktag Balancing by Rule or Inherited Value	UPDATED Updated tables to include payroll third-party payments.

Payroll Considerations

Setup Considerations: Time Off Calculations for Payroll	UPDATED Updated domain security name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic.

Payroll History

Setup Considerations: Payroll History	UPDATED In the Reporting section, added information about the Payroll Calculation Processing Report.

Payroll Input

Setup Considerations: Payroll Input	UPDATED In the Reporting section, added information about the Find Payroll Input report.
Steps: Set Up Payroll Input	UPDATED Added a bullet in Step 3 to include information on adding payroll input on the worker payroll results.
Steps: Set Up Payroll Input	UPDATED Expanded the Context section to provide information on machine learning prompt recommendations.
Add Payroll Input for Workers	UPDATED To Context and steps 1 and 4, added information on enabling machine learning prompt recommendations.
Concept: Payroll Input on Payroll Results	NEW Describes the concept of adding payroll input on payroll results, and compares 3 payroll input tasks.
Concept: Data Entry in Payroll Input EIB Spreadsheets	UPDATED In the Modify Existing Pay Input example, clarified that you can only modify a pay input end date after it was used in a payroll calculation.

Payroll Processing

Create On-Demand Replacement Payments	UPDATED Added information on enabling machine learning prompt recommendations.
Create On-Demand Additional Payments	UPDATED

	In the Results section, clarified that when pay input is added to an on-demand additional payment, Workday considers it to be an override entry and ignores worker eligibility on the pay component.
Create On-Demand Additional Payments	UPDATED Added information on enabling machine learning prompt recommendations.
Example: Trailing Payments for International Transfers	UPDATED Added a note about Workday Payroll for the UK not supporting international assignments.
Create Manual Payments	UPDATED Added information on enabling machine learning prompt recommendations.
Setup Considerations: Prior Period Tax Adjustments	UPDATED Updated the Limitations section to explain that using the PPTA calculator for a worker with position-based taxes and retroactive changes to their position and location will cause an error on the on-demand additional payment.
Concept: Prior Period Tax Adjustment Calculator	UPDATED Updated the Retroactive Changes to a Worker's Position and Location section to explain how using the PPTA calculator can cause an error on the on-demand additional payment.

Payroll Third-Party Payments

Concept: Payroll Third-Party Payments	UPDATED Added steps to Check Printing for U.S. Payroll.
Concept: Payroll Third-Party Payments	UPDATED Added information about the Payroll Third-Party payments grid on the deduction recipient.
Concept: Payroll Third-Party Payable Items	UPDATED Added information about unsupported retro events.
Create a Payroll Third-Party Payment	NEW

	Describes how to create a payroll third-party payment for a deduction recipient.
Concept: Payroll Third-Party Payments Accounting	UPDATED Describes updates to realized gain/loss, multi-currency scenarios, and account posting rules.

Payslips

Setup Considerations: Payslips	UPDATED Added the Use Case on creating payslip messages for Payroll for Australia. Added the security domains required to use payslip messages with Payroll for Australia.
Define Payslips	UPDATED For Payroll for Australia, added the optional step 8 for adding messages to payslips.
Define Payslips	UPDATED For Payroll for the UK, enhanced steps 3 and 6 to include the new localised GBR payslip.
Steps: Set Up Standard Report Designer Payslips	UPDATED Added the name of the second Business Layout Form for UK payslips to Context.

Pensions Auto-Enrolment (UK)

Setup Considerations: Pensions Auto-Enrolment (UK)	UPDATED Added re-enrolment information for security domains and reporting.
Set Up Worker Pensions Auto-Enrolment (UK)	UPDATED Updated steps 2 and 3 to add information specific to re-enrolment.
Set Up Company Pensions Auto-Enrolment (UK)	UPDATED Removed Re-Enrolment Date row from step 2. This field is now on the new Maintain Company UK Pensions Re-Enrolment Details task.
Steps: Set Up Pensions Re-Enrolment (UK)	NEW

	New topic for 2024R2.
Select Workers for Pension Re-Enrolment (UK)	NEW New topic for 2024R2.
Steps: Set Up Pensions Auto-Enrolment Notifications (UK)	UPDATED Added details to the Next Steps section about excluding workers on the Send UK Pensions Auto Enrolment Notifications task.

Real Time Information (RTI) Reporting (UK)

Steps: Process Real Time Information Full Payment Submissions (UK)	UPDATED Updated step 1 to include the new Enable Smart RTI check box.
FAQ: Real Time Information Reporting (UK)	UPDATED Amended special characters question to add addresses and report.

Retroactive Payroll

Setup Considerations: Retroactive Pay Processing	UPDATED In the Recommendations section, added a recommendation about configuring tenant settings related to different tax authorities for Payroll for the U.S. In the Tenant Setup section, added a point about enabling tax calculation under the correct tax authority for retro pay for Payroll for the U.S.
Steps: Set Up Retro Processing	UPDATED Added an optional step 1 for Payroll for the U.S. about setting up retro processing for different tax authorities.
Steps: Process Retro Differences from Tax Authority Change	NEW How to process retro differences from a tax authority change.
Concept: Retro Differences from Tax Authority Changes	NEW Describes the concept of retro differences from tax authority changes and how Workday processes them.
Reference: Supported Retro Events	UPDATED

	Added Retro End Additional Job, Retro Pay Group Change, and Retro Tax Authority Change to the table for Payroll for Canada.
Concept: Supported, Unsupported, and Unprocessed Retro Events	UPDATED Removed retro tax authority change as an example of an unsupported retro event for Payroll for Canada.
Concept: Retro End Additional Job (CAN)	NEW Describes the retroactive End Additional Job event type for Payroll for CAN.
Concept: Retro Pay Group Change (CAN)	NEW Describes the concept of retroactive pay group changes for workers.
Concept: Retro Tax Authority Change (CAN)	NEW Details how Workday processes retro tax authority changes for Payroll for Canada.

Set Up Payroll Processing

Reference: Tenant Analyzer	UPDATED Updated domain security name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic.
Assign Workers to Pay Groups	UPDATED Added information on enabling machine learning prompt recommendations.

Tax Setup (AUS)

Set Up Foreign Employment Income (FEI) and Inbound Assignees to Australia (IAA) Tax Reporting (AUS)	UPDATED How to set up FEI and IAA tax reporting for Payroll for Australia.
PAYG for Working Holiday Makers (AUS)	NEW How to use PAYG for Working Holiday Makers with Workday Payroll for Australia.

Tax Setup (UK)

Set Up Employer Reference Tax Details (UK)	UPDATED Amended Enable RTI FPS Special Characters row in step 4 to add addresses and report details.

Tax Setup (USA)

Set Up Company Federal Taxes (USA)	UPDATED Added the Company Name Override for Year End Forms Line 2 field.

Withholding Orders

Steps: Set Up Electronic Income Withholding Orders (USA)	UPDATED In step 1, removed a link to a retired Community post.

Year-End Tax Reporting

FAQ: Year-End Tax Reporting (USA)	UPDATED Updated to add information on how to display a different address on W-2 forms and reports if the company has more than 1 address.

Reporting and Analytics

March 14, 2025

Custom Reports and Analytics

Set Up Advanced Options for Custom Reports	UPDATED In Step 8, added the new Facet Value Sorting column.
Concept: Effective and Entry Dates	UPDATED Changed from recording dates in Pacific time to the user's time zone.
Concept: Interacting with Report Results	UPDATED

	Noted the new **Facet Value Sorting** in the Filtering by Facets section.
Setup Considerations: Composite Reports	UPDATED Added new Question to Consider about copying row configurations to multiple target reports.
Set Up Composite Report Rows	UPDATED Updated to include information about importing rows from other reports.
ORDER BY	UPDATED Desribes data sorting behavior when you don't include ORDER BY clause.

Discovery Boards

Highlight Data in a Viz	UPDATED • Added that you can now highlight boolean, date, and text fields. • Reordered the steps for clarity. • In the Results section, clarified which formatting Workday applies when you define overlapping conditions.
Download Visualizations	UPDATED In Step 3, provide explanation on how access to the Download as CSV option can be restricted.

Prism Analytics

Create a Data Change Task	UPDATED Added a row to the table in step 3 to describe how to use BigQuery connections
Concept: Data Change Task Connections	UPDATED Added a row describing BigQuery connections.
Create a BigQuery Connection	NEW How to create a BigQuery connection for Prism Analytics.
Steps: Convert an External Dimension Text Field to an Instance Field	NEW

	Describes how to use analytic dimensions and an Instance mapping stage to convert a dataset Text field to an Instance field.
Create an Analytic Dimension Business Object with Values	NEW Describes how to create an analytic dimension business object and add dimension values to it.
Create an Analytic Dimension Hierarchy and Assign Values	NEW Describes how to create hierarchies in an analytic dimension business object and assign dimension values to a specific hierarchy.
Add an Instance Mapping Stage	NEW Describes how to use an Instance Mapping stage to convert a Text field to an Instance field using an analytic dimension business object.
Concept: Analytic Dimensions	NEW Describes the new analytic dimensions feature that you can use to bring in external dimension data and store it in Prism as user-defined instance data.
Example: Create and Use an Analytic Dimension	NEW Describes how to create and use an analytic dimension business object with a Prism dataset Instance Mapping stage to convert a Text field containing external dimension data into an Instance field.

Worksheets

Reference: Workbook Actions Available Based on Permissions	UPDATED Added information about how to save and share private filters in workbooks.

February 21, 2025

Reporting on Modeled Data Sources

Concept: Differences Between OfficeConnect and Report Writer	UPDATED

	Updated Rounding and Significant Digits with Currency Translation section with additional instructions (bullet 2) on how to change default formatting for OfficeConnect data.

Worksheets

Concept: Using External References to Refer to Data in Other Workbooks	UPDATED Added information about how you can update external references in consumer workbooks manually or by scheduling data refreshes.

February 7, 2025

Custom Reports and Analytics

Reference: Reporting Tools in Workday	NEW Describes the reporting tools in Workday.
Reference: Fulfill a Report Request	NEW Describes steps in fulfilling a report request.
Create Custom Reports	UPDATED In: • The Context section, added the recommendation of validating reports after migration. • Step 2, added the new Recommendation folder for data sources.

Prism Analytics

Set Up Table Sharing	UPDATED Clarified that you should select user-based security groups in the Role Assignees Restricted to column for the Prism roles.
Set Up Dataset Sharing	UPDATED Clarified that you should select user-based security groups in the Role Assignees Restricted to column for the Prism roles.

January 24, 2025

Discovery Boards

Steps: Set Up Tenant for Discovery Boards	UPDATED In Step 2, clarified the formatting behavior for some English-speaking locales.

Worksheets

Concept: Using External References to Refer to Data in Other Workbooks	UPDATED Updated information about how you are now able to open consumer workbooks that have external references without having to wait for the workbooks to recalculate updates from a producer workbook.

January 10, 2025

Custom Reports and Analytics

Concept: Custom Reports	UPDATED Added the Report Fields and Values section that describes the new Report Fields and Values task.
Setup Considerations: Custom Reporting	UPDATED In the Recommendations section, added the recommendation of validating reports after migration.

Discovery Boards

Concept: Discovery Board Security	UPDATED Described an example for how discovery board security affects users with different data access.

December 13, 2024

Custom Reports and Analytics

Concept: Accessing RaaS Output	UPDATED

	Corrected the description for <username> in the Report Output URL table.

Prism Analytics

Concept: Creating Reports to Import into Tables and Datasets	UPDATED Clarified that Workday doesn't support effective dating for instance fields. The data returned is always as of the current time.
Concept: Data Change Task Connections	UPDATED Added a row describing SFTP connections.
Edit Prism Data Source Security	UPDATED Added step 9 to clarify that you need to publish the dataset again to apply the new security configuration to the Prism data source.

Workday Report Designer

Example: Print a Custom Report in a Workday Studio Integration	NEW Migrated from the Workday Community page: Workday Report Design (BIRT) Self-Guided Tutorials and Examples. Using a BIRT Report Design within a Workday Studio Integration.

November 29, 2024

People Analytics

Reference: Visualizations by Topic	UPDATED In this topic, • updated verification parameters for the Hiring visualizations, • updated filter expression formatting.

November 15, 2024

Custom Reports and Analytics

Reference: WQL REST API	UPDATED

	Updated code snippets to reflect addition of primary and releated business objects in some WQL responses. Also updated with Syntax statement and Query example for each endpoint.

People Analytics

Concept: People Analytics Activities	UPDATED • Provided more context on the installation activity and added a note about troubleshooting installation issues.

Workday Report Designer

Concept: Report Designer Fonts	UPDATED Updated the topic with a note saying that Workday doesn't support the Arial font.
Example: Create a Report Design for a Letter	NEW Migrated from the Workday Community page: Workday Report Design (BIRT) Self-Guided Tutorials and Examples. How to create a report design for a new hire letter.
Example: Create a Report Design With Dynamic Translation Based on Preferred Locale	NEW Migrated from the Workday Community page: Workday Report Design (BIRT) Self-Guided Tutorials and Examples. How to use onCreate scripts to translate the static text on custom report items dynamically based on locale preference.
Example: Create a Report Design With a Chart	NEW Migrated from the Workday Community page: Workday Report Design (BIRT) Self Guided Tutorials and Examples. How to create a report design with a chart.
Example: Create a Report Design With an Embedded Background Image	NEW Migrated from the Workday Community page: Workday Report Design (BIRT) Self Guided Tutorials and Examples. How to create a report design with a scanned form as a background image.

November 1, 2024

Prism Analytics

Reference: External Data Limits	UPDATED Clarified the maximum number of fields allowed in tables and published datasets.
Create a Data Change Task	UPDATED Updated step 3 to describe how to use Snowflake connections.
Concept: Data Change Task Connections	UPDATED Describes how Snowflake connections for data change tasks work in Workday.
Create a Snowflake Connection	NEW How to create a Snowflake connection for Prism Analytics.

October 18, 2024

Discovery Boards

Steps: Set Up Tenant for Discovery Boards	UPDATED In Step 2, added localized languages and defaults for discovery boards.

People Analytics

Reference: Business Objects and Data Sources in People Analytics	UPDATED In Business Objects, corrected the Primary Business Object for Hiring from 'Recruiting Status' to 'Job Requisition'.

Prism Analytics

Reference: External Data Limits	UPDATED Increased the external data limits for creating and editing buckets in a 24-hour rolling period to 24,000.

October 4, 2024

Custom Reports and Analytics

Concept: Business Objects, Data Sources, and Fields	UPDATED Moved topic from Workday Reporting Concepts to Data Sources.
Concept: Indexed Data Sources and Fields	UPDATED Moved topic from Workday Reporting Concepts to Data Sources.
Concept: Selecting a Data Source	UPDATED Moved topic from Workday Reporting Concepts to Data Sources.
Setup Considerations: Trended Workers Report Data Source	UPDATED Moved topic from Trending Reports to Data Sources.
Set Up the Trended Workers Report Data Source	UPDATED Moved topic from Trending Reports to Data Sources.
Concept: Trended Workers Report Data Source	UPDATED Moved topic from Trending Reports to Data Sources
Reference: Reporting on the Trended Workers Report Data Source	UPDATED Moved topic from Trending Reports to Data Sources.

People Analytics

Concept: Key Performance Indicators (KPIs)	UPDATED Expanded a note in the intro section to clarify what determines the minimum headcount required for KPI display.

Prism Analytics

Create a Salesforce Connection	UPDATED • Added support for the Use Sandbox option that you can use so that Workday connects to your Salesforce sandbox environment instead of the Production environment.

	• Clarified the minimum required OAuth scopes for the Salesforce Connected App or External Client App.

September 20, 2024

Custom Reports and Analytics

Setup Considerations: Custom Reporting	UPDATED In the Limitations section, added the limitations to freezing columns on reports.
Create Custom Reports	UPDATED In the Next Steps section, clarified the behavior for freezing columns on composite reports.
Set Up Advanced Options for Custom Reports	UPDATED In Step 3, removed the Freeze Control Field option for composite reports.
Schedule Reports or Report Groups	UPDATED Added a new Step 4 for the View in Browser Output Type option for composite reports.
Manage Report Usage	UPDATED Created a new topic to explain how report admins can delete saved filters set up by active or terminated users.
Concept: Report Tags	UPDATED Updated to explain users can add a description to report tags and edit the reference ID of a report tag.
Reference: Reporting Limits	UPDATED In the: • Scheduled Report Output section, added the View in Browser Output Type option for composite reports. • Reports Run in the Browser section, added the report result limitation for composite reports that use View in Browser.
Setup Considerations: Composite Reports	UPDATED

	In the Limitations section, clarified the behavior for freezing columns on composite reports.
Enable Business Objects for Filtering and Grouping	**UPDATED** In the Hierarchy Structure row of Step 2, added the configuration requirement to enable Bulk Add Rows.
Set Up Composite Report Columns	**UPDATED** In the Next Steps section, added more information about duplicating columns.
Set Up Composite Report Rows	**UPDATED** Added more information about: • Bulk Add Rows for lookup data rows in Step 3. • Duplicating rows in the Next Steps section.
Set Up Composite Report Cells	**UPDATED** Added more information about the new Cells tab and Calculation Expression Builder for calculation cells.
Set Up Additional Options for Composite Reports	**UPDATED** • Removed Step 8 on selecting the Freeze Control Field check box. • In the Next Steps section, clarified the behavior for freezing columns on composite reports.
Create Calculation Expressions	**UPDATED** Added more information about the Calculation Expression Builder and Absolute Reference for calculation cells.
Concept: Composite Reports	**UPDATED** Clarified the behavior for freezing columns on composite reports.
Reference: Composite Report Columns	**UPDATED** • In the Control Field row of the table, removed content about freezing control field columns. • Clarified the behavior for freezing columns on composite reports.
Reference: Composite Report Cells	**UPDATED**

	Added more information about the Calculation Expression Builder for calculation cells.
Reference: Calculation Expressions	UPDATED Added more information about the Calculation Expression Builder and Absolute Reference for calculation cells.
Concept: Related Business Objects in WQL	UPDATED Added that responses from these endpoints now return the related business object for each field: • GET /dataSources/{ID}/fields • GET /dataSources/{ID}/dataSourceFilters/{subresourceID}
Reference: WQL REST API	UPDATED Addedthat responses from these endpoints now return the primary business object for each data source: • GET /dataSources • GET /dataSources/{ID} Added that responses from these endpoints now return the related business object for each field: • GET /dataSources/{ID}/fields • GET /dataSources/{ID}/dataSourceFilters/{subresourceID}

Discovery Boards

Concept: The Discovery Board Workflow	UPDATED Updated to add sections that describe the various phases of creating and editing a discovery board. Added cross references to other topics to read more details.
Concept: Summarization and Attribute Viz Fields	UPDATED • Renamed this topic from Reference: Summarization and Attribute Viz Fields. • Added support for median and percentile aggregate functions for summarization fields. • Reorganized and reworded the topic for clarity.
Set Up Visualization Options	UPDATED Added a new step to include Reference Lines. Added new link to Set Up KPI Viz Options topic.

People Analytics

Setup Considerations: People Analytics	UPDATED In the Question to Consider table, changed several sections for the Configurable filters in People Analytics.
Set Up Languages in People Analytics	NEW Added a new topic for the steps on how to change language preferences in People Analytics.
Steps: Configure Application Settings	NEW Added a dedicated topic for Application Settings configuration in The Configure People Analytics report.
Steps: Configure a Pipeline in People Analytics	UPDATED Renamed the topic from 'Steps: Configure A Pipeline in People Analytics' to 'Steps: Configure Worker Pipeline in People Analytics' Moved information unrelated to worker pipeline configuration to the new topic 'Steps: Configure Application Settings in People Analytics'
Reference: Business Objects and Data Sources in People Analytics	UPDATED Updated business object data source names for the Hiring Data Sources.
Reference: Fields in People Analytics	UPDATED Updated field names, descriptions, and added a new section for Hiring V2.
Reference: Requirements and Considerations for Changing People Analytics Configuration	UPDATED In the Application Settings table, added a Population Views item.
Example: Configure Population Views with Calculated Source Fields	NEW Example showing how to configure population views with calculated source fields.
Example: Configure Population Views with Custom Source Fields	NEW Example showing how to configure population views with non-default source fields.

Example: Configure Population Views with Default Fields	NEW Example showing how to configure population views with default fields.

Prism Analytics

Create a Salesforce Connection	NEW How to create a Salesforce connection for Prism Analytics.
Edit Prism Data Source Security	UPDATED Clarified how Workday applies the Prism: Default to Dataset Access security domain when no security domain has been explicitly configured for the Prism data source.

Reporting on Modeled Data Sources

Concept: Differences Between OfficeConnect and Report Writer	UPDATED Included info and links about NCI support for 2024 R2

Worksheets

Set Up Worksheets	UPDATED Added a step with a link to a topic that explains how to enable Innovation Services features. Added a step about how to enable Formula Writer and Explainer functionality.
Concept: Live Data in Workbooks	UPDATED Updated information about filtering live data.
Reference: Workbook Actions Available Based on Permissions	UPDATED Added information about public and private filters.

Spend Management

March 14, 2025

Inventory

Set Up Purchase Items for Inventory	UPDATED Added the Full Serial option to the Serial Control Type rows in Steps 3 and 6. Fixed missing spaces.
Put Away Inventory	UPDATED Removed the ad-hoc put-away information from Step 2 and Results, and updated the Next Steps section for the Put Away Transaction Origin field.
Ad-Hoc Put Away Inventory	NEW How to record ad-hoc put-away inventory items.

Procurement

Reference: Company Procurement Options	UPDATED In the General Requisitions options table of the Requisition section, added row to provide information on the Default Non-Catalog Request Line Type in Requisitions Worklet option.
Configure Item Identifier Types for Transactions	UPDATED Added an example on configuring Manufacturer and Manufacturer Part Number as primary item identifiers.
Setup Considerations: Item Pricing	UPDATED Added information to consider when you manage contracts through a group purchasing organization (GPO).
Create Purchase Items	UPDATED • Added a Manufacturer Part Number and Manufacturer row in Step 2. • Replaced the example of an alternate item identifier type in Step 4.
Create Purchase Items	UPDATED

	Added a Serial Control Type row to Step 2. Fixed an empty bullet in Step 5.
Steps: Set Up Consignment	UPDATED In Steps 2 and 3, expanded the Bill and Replacement table rows to include information on the Lot and Serial option.
Maintain Requisition Types	UPDATED In the table in Step 2, added the Lot and Serial row and expanded the Bill Only row to provide information on the Lot and Serial option.
Steps: Create Requisition Templates	UPDATED Revamped the entire topic based on the inputs and aligned the fields as per the SUV. Updated the new fields with respect to the feature
Create Requisitions	UPDATED Modified the value in Add from Templates and Requisition and added information related to search criteria.
Close Requisitions or Requisition Lines	UPDATED To provide more information on closing requisition lines: • Renamed this topic from Close Requisitions to Close Requisitions or Requisition Lines. • Expanded the Context and Result sections. • Added Step 2 to provide information on the Close Lines related action.
Concept: Requisition Templates	UPDATED Added information with respect to Requisition Template filter and removed note related to price as that is handled by product now.
Create Requisitions in the Requisitions Worklet	UPDATED In Step 4, expanded the: • Search Catalog table row to include information on tailored search results. • Request Non-Catalog Items table row to include information on catalog request recommendations.
Reference: Requisitions Worklet Ordering Methods	UPDATED

	Expanded the Search Catalog and Request Non-Catalog Items table rows to include information on tailored search results and catalog request recommendations.
FAQ: Requisitions Worklet	UPDATED Expanded the "What is the Request Non-Catalog Items section for?" response to include information on catalog request recommendations.
Maintain Purchase Order Types	UPDATED In the table in Step 2, added the Lot and Serial row and expanded the Bill Only row to provide information on the Lot and Serial option.
Create Change Orders	UPDATED In Step 2, added information on the impact of high volume grid.
Steps: Create Supplier Contracts	UPDATED In the Steps section: • Clarified the description for the Multi-Supplier option in step 1. • Added information on how to display the Supplier Item Contract Pricing tab in step 2.

Strategic Sourcing

Steps: Connect Strategic Sourcing to Tableau using Taco	UPDATED Updated topic with steps for connecting your Strategic Sourcing data to Tableau Desktop version 2024.1 or later.

February 21, 2025

Strategic Sourcing

Steps: Connect Strategic Sourcing to Tableau using Taco	UPDATED Added note about upcoming update now that Tableau has deprecated Web Data Connector 2.x.

February 7, 2025

Procurement

Concept: Buyer Hub	UPDATED Expanded the second paragraph to include more information and an example about the transactions users can view in the Buyer hub, for clarity.

Strategic Sourcing

Set Up Public Sourcing Site Communications	UPDATED Clarified that only company admins can access the Public Site Communications page in Next Steps.
Map Form Responses to Supplier Profiles	UPDATED Added the Next Steps section.
Steps: Set Up Supplier Connector for Strategic Sourcing	UPDATED Removed row referencing the WSS API URL in step 12 as it's no longer required.
Troubleshooting: Strategic Sourcing Supplier Connector	UPDATED Updated the 400 error solution and added the 401 error.
Troubleshooting: Strategic Sourcing Supplier Contracts Connector	UPDATED Added 2 troubleshooting conditions.
Concept: Scorecard Scoring Logic	UPDATED Clarified that the logic applies to performance reviews and sourcing events.

January 24, 2025

Procurement

Reference: Company Procurement Options	UPDATED

	In the Shipping and Billing Defaults section, expanded the Bill-To Contact table row to include information on how Workday populates the bill-to contact for purchase orders.
Close Purchase Orders	UPDATED In the Context section, added receipts with Draft status to the list of items preventing you from closing a purchase order.

December 13, 2024

Strategic Sourcing

Troubleshooting: Strategic Sourcing Supplier Connector	UPDATED Added 2 rows to the Integration Error Messages table and added 1 new troubleshooting scenario.
Concept: Strategic Sourcing Home Page	UPDATED Updated the note to direct you to Customer Care.
Manage Deadlines	UPDATED Added that no action is required for deciding not to bid in Step 2.

November 15, 2024

Procurement

Create Purchase Items	UPDATED Added a note to Step 6 about substitute items that have their own substitute items configured.
Create Requisitions	UPDATED Added Step 5 to provide information on options in the Requisition Information section of a requisition.

Strategic Sourcing

Set Up Dun & Bradstreet in Strategic Sourcing	NEW How to set up the Dun & Bradstreet integration in Strategic Sourcing.

Reference: D&B Integration Authorized Countries	NEW Provides additional information on countries authorized to use the Dun & Bradstreet integration.
Troubleshooting: Single Sign-On (SSO) for Workday Strategic Sourcing	UPDATED Added a new troubleshooting strategy for user timeout issues.
Steps: Set Up User Provision for Strategic Sourcing	UPDATED Added more information to the Context section and added a not to the Prerequisites section.
Reference: Supplier Contract Connector Synced Fields	NEW Provides additional information on the synced fields in the Supplier Contract Connector.
Concept: Message Center	UPDATED Added where to find the Message Center in the Answering Supplier Questions section.
Revise Contracts	UPDATED Added information in the Context section about contract document limitations on a contract revision record.
FAQ: Contacting Strategic Sourcing	UPDATED Updated the Message Center section title to match the user interface.
Complete a Supplier Form	UPDATED Added how to export the form in step 3.
FAQ: Events	UPDATED Added depth to the answer to How do I add internal team members to an event I've been invited to?

November 1, 2024

Inventory

Create Inventory Count Sheets	UPDATED

	Expanded the table in Step 2, to provide information on the Include Items with Inventory Site Options Only option.

October 18, 2024

Inventory

Setup Considerations: Put-Away	UPDATED Added a limitation about removing lines from put-aways for return orders.

Strategic Sourcing

Set Up DocuSign in Strategic Sourcing	UPDATED Added a link to Set Up DocuSign in a Strategic Sourcing Profile in the Results section.
Set Up Supplier Self-Registration	UPDATED Added step 4 for including instructions for suppliers.
Steps: Set Up Award to Requisition Integrations	UPDATED Added detail and clarified steps 2 and 3.
Add Auto-Scoring	UPDATED Added information about using Edit Automatic Scoring in Compare Bids in the Results section.
Resend Invitations	UPDATED Added detail to the Context section and another choice to the table in step 2.
Resend Invitations	UPDATED Removed the already registered limitation mentioned in the Context section as it no longer applies. Added a row to the table in Step 2.
Set Up Supplier Forms on Behalf of Suppliers	UPDATED Updated Steps section to match the user interface.
Password Reset for Suppliers	UPDATED

	Combined steps 6 and 7, and added a note to step 6 about the Try With SMS option.

October 4, 2024

Strategic Sourcing

Steps: Set Up Strategic Sourcing	UPDATED Added User Session Expiration to the table in step 2.
Steps: Create Project Approval Flows	UPDATED Added step 3 and clarified the ad hoc approval feature in Context.
Create Dependent Fields for Custom Fields	UPDATED Renamed to align with the user interface and changed conditional lists to dependent fields.
Import Data	UPDATED Added bullet to step 3 to clarify that empty cells in the uploaded spreadsheet don't overwrite existing data.
Send Customized Invitations	UPDATED Updated the Context section to match the user interface.
Request Bid Updates	UPDATED Corrected the first bullet in step 2.
Extract Metadata from Contracts	UPDATED Added a note to the Context section about limitations of this feature.
Rerun Supplier Forms	UPDATED Clarified the navigation in steps 1 through 3.
Password Reset for Suppliers	UPDATED Clarified step 2 and added step 3.

September 20, 2024

Inventory

Set Up Inventory Sites	UPDATED Updated Apply Kill or Backorder Action to Entire Stock Request (Non-Par)/(Par) row in step 5.
Set Up Purchase Items for Inventory	UPDATED Added lot and serial control options information to step 6.
Steps: Set Up Accounting for Inventory	UPDATED Added an optional step 2, for the Support Inventory Site Time Zone for Inventory Accounting Date feature.
Steps: Set Up Inventory Reorder Points	UPDATED Added a note to the Previous Horizon Days row about item first issuance.
Setup Considerations: Label Printing	UPDATED Added a use case for alternate item identifiers.
Setup Considerations: Recall Management	UPDATED Updated topic for ECRI package solution, Recall Workbench task, and Review Recall Line Details task.
Create a Recall	UPDATED Updated Next Steps for the Review Recall Line Details task and Recall Workbench task.

Procurement

Mass Change Worker on Procurement Document	NEW How to set up mass change action for requisition requesters and purchase order buyers.
Set Up Shipping Information	UPDATED Expanded Step 3 to provide information on the EDI Code field.
Concept: Buyer Hub	UPDATED

	Expanded the Customize Buyer Hub section to provide information on the Configure Overview and Customize Hub Navigation actions.
Create Purchase Items	UPDATED Updated step 6 for substitute items with different base units of measure, and differences between base and ordering units of measure in auto-sourcing.
Setup Considerations: Requisitions	UPDATED Added a row for the Mass Change Worker on Procurement Document business process. Removed information about the Mass Change Requisition Requester business process.
Create Requisitions	UPDATED Removed information about the Mass Change Requisition Requester task and added information about the Mass Change Worker on Procurement Document task.
Configure Cart Links	UPDATED In the Result section, added information about instructional text for ordering methods.
Create Purchase Orders	UPDATED Expanded the third row on Step 3 to provide information about shipping methods and the EDI Code field.
Edit Purchase Orders	UPDATED In Next Steps, added information about the Mass Change Worker on Procurement Document task.
Provide Spend Transaction Instructions	UPDATED In the Result section, added information about instructional text for requisitions.

Strategic Sourcing

Create Project Workflows	UPDATED Added steps for adding transitions to custom workflows.
Set Up Public Sourcing Site Communications	NEW

	How to set up the public sourcing site communications in Strategic Sourcing.
Download Supplier Emails Log	NEW How to download the supplier email log in Strategic Sourcing.
Concept: Strategic Sourcing Contracts	UPDATED Added the Contract Search section.
Extract Metadata from Contracts	NEW How to extract metadata from contracts in Workday Strategic Sourcing.
Concept: Customer Directory	UPDATED Added information about the Unified Supplier Portal.
Concept: Unified Supplier Portal for Suppliers	NEW Describes the concept of the Unified Supplier Portal in Workday Strategic Sourcing.
Access Supplier Invoice Requests in the Unified Supplier Portal	UPDATED How to access supplier invoice requests in the Unified Supplier Portal in Workday Strategic Sourcing.
Account Recovery for Suppliers	UPDATED How to recover your account as a supplier for Workday Strategic Sourcing.
Complete an Onboarding Form	UPDATED Clarified steps to match the updated user interface.
FAQ: Supplier Sign In and Account Security	UPDATED Added information about Account Recovery and the Unified Supplier Portal.

Student

March 14, 2025

Academic Advising

Set Up Academic Progress Display Policy	UPDATED Clarified information about viewing academic progress display configurations.
Reference: Academic Progress Report	UPDATED Updated the Cumulative GPA section to Cumulative GPA Including Transfer.
Steps: Set Up and Assign Advisors	UPDATED Added information about the Create Advisor task.

Financial Aid

Reference: Run Student Financial Processes Reports	NEW Information about student financial processes reports.
Setup Considerations: Actual Enrollment Usage Start Date	UPDATED In Use Case section: • Updated report name from Run Student Financial Aid Processes by Student report to Run Student Financial Services Processes by Student. • Added a link to a topic providing additional information about the Run Student Financial Services Processes by Student report.
Refresh Financial Aid Attendance Plans	UPDATED In Step 1, added a link to the new Reference: Run Student Financial Processes Reports topic.
Refresh Financial Aid Attendance Plans	UPDATED Added a sentence to Step 3 about refreshing the load statuses.

Concept: Financial Aid Attendance Plans	**UPDATED** Added a link in the Refreshing Financial Aid Attendance Plans section to a topic offering more information about Student Financial Processes reports.
Concept: Actual Enrollment Usage Start Date	**UPDATED** In the Use Case section: • Updated report name from Run Student Financial Aid Processes by Student to Run Student Financial Services Processes by Student. • Added a link to a topic providing additional information about the Run Student Financial Services Processes by Student report.
Concept: Financial Aid Class Standings	**UPDATED** Expanded the Class Standing by Period section to provide more information on what Workday takes into consideration when calculating period-based class standing.
Select ISIRs for Crossover Periods	**UPDATED** Updated Step 2 to provide additional information about viewing the Financial Aid Period Record Manage ISIR for Pell Grant Crossover Periods task.
Steps: Set Up Financial Aid Action Items	**UPDATED** Updated Step 5 to account for all business processes listed in Step 3.
Create Student Cost Items	**UPDATED** In Step 2: • Added a row for the new Pell Cost Eligibility Override prompt. • Updated the description for the Less-Than-Half-Time Pell Cost prompt.
Concept: Loan Sequencing	**NEW** Describes the concept of loan sequencing in Workday Student.
Reference: Disbursement Eligibility Conditions	**UPDATED** In the Pending Repackaging condition row, updated these report names and added a link to a topic providing additional information:

	• Run Financial Aid Processes by Applicant to Run Student Financial Aid Processes by Applicant. • Run Financial Aid Processes by Student to Run Student Financial Services Processes by Student.
Certify Alternative Loan Applications	**UPDATED** In the Next Steps section, added a link to steps for correcting a transmitted alternative loan application.
Initiate Alternative Loan Application Changes	**UPDATED** In the Next Steps section, added a link to steps for correcting a transmitted alternative loan application.
Concept: Alternative Loans	**UPDATED** • For the Alternative Loan Application Send Response Inbound integration touchpoint, updated the description to provide new match validations. • In the Alternative Loan Change Processing section, added a link to steps for correcting a transmitted alternative loan application.
Reference: Alternative Loan Statuses	**UPDATED** Added a Note to the Canceled status providing additional information about how Workday handles disbursement and the Total Financial Assistance report.
Edit MPN Information for Parent PLUS Loans	**NEW** Steps for editing MPN information for Parent PLUS loans.
Remove MPN Certification	**NEW** Steps to remove an MPN certification from a student award.
Concept: Master Promissory Notes	**NEW** Describes the concept of Master Promissory Notes (MPNs) in Workday.
Steps: Return Title IV Funds	**UPDATED** Added information about the Maintain Return of Title IV Configuration task.
Set Up Return of Title IV Worksheets	**UPDATED** • Renamed topic from Create a Return of Title IV Worksheet.

	• Expanded Step 3 with information about new options on the **Percentage Earned** tab.
Evaluate Satisfactory Academic Progress	UPDATED In Step 2, added a new row for Student Cohorts.

Recruiting and Admissions

Steps: Set Up Admissions	UPDATED Removed step about defining certifications and employers.
Steps: Set Up Student Sites	UPDATED Moved Step 1 info about delaying external account creation to the new Configure Student External Site Accounts topic.
Configure Student External Site Accounts	NEW Created topic. Moved some info from Step 1 of the Steps: Set Up Student Sites topic.
Steps: Set Up and Assign Preliminary Transfer Credit	UPDATED In the Initiate Preliminary Transfer Credit Evaluation row on Step 6, added information about the Transfer Credit Troubleshooting button.

Student Financials

Concept: Adjusting and Canceling Student Charges	UPDATED • In the Canceling and Reassessing section, clarified that you can only cancel and reassess charges on student financial period records. • Added that information about canceling charges only.
Setup Considerations: Student Sponsor Contracts	NEW How to set up student sponsor contracts.
Steps: Set Up Student Waivers	UPDATED Added information about the new student waiver experience.
Create Student Waiver Items	UPDATED Added information about the new student waiver experience.

Create Student Waiver Item Rules	NEW Added information about the new student waiver experience.
Set Up Student Waiver Item Assignments	NEW Added information about the new student waiver experience.
Concept: Posting Student Waivers	UPDATED Added information about the new student waiver experience.
Troubleshooting: Student Waivers	UPDATED Added information about the new student waiver experience.
Remove Past Due Balance Holds and Restore Registrations	UPDATED In Step 1, added a link to a topic providing additional information about the Run Student Financial Services Processes by Student report.

Student Records

Steps: Set Up Curriculum Management	UPDATED On Step 4, added that you can configure different campus assignment policies for subordinate academic units.
Create Course Sections	UPDATED On Step 2, • Added the Academic Period row. • Clarified the Eligibility Rule row. • Moved information about Order, Eligibility Rule, Reserved Unit Date, and Reserved Capacity Line Released to the Reserved Capacity row. Expanded and clarified the Result section. Added information about where students can view reserve capacity and available seats.
Steps: Set Up Waitlist Policies	UPDATED Expanded on the Context section and Step 3 to include more information about the ability to send waitlist promotion notifications to students with registration restrictions.
Steps: Manage Student Registrations	UPDATED

	Added a sentence about waitlisted registrations.
Concept: Registration Drops and Swaps	**UPDATED** Clarified the Context to explain how students can manage their course registrations.
Reference: Drop Students from Courses	**UPDATED** Expanded on the Drop students who no longer meet course prerequisites row to include information on how the Mass Drop Invalid Student Registrations task affects reserved capacity seats.
Concept: Waitlists	**UPDATED** Expanded on the introduction and Waitlist Promotion sections to include information about the new course waitlist policy configuration options.
Set Up Course Unit Type Policies	**UPDATED** Added Step 2 for the Choose What to Configure section. Added the Result section for where you can view course unit type policies.
Set Up Load Status Policies	**UPDATED** Renamed from Steps: Set Up Load Status Policies. Migrated content from Create Load Status Rule Sets. Expanded Context section to add information about National Student Clearinghouse reporting. Added Prerequisites and Next Steps sections.
Steps: Set Up Class Standing Policies	**UPDATED** Added information about how Workday processes multiple rules with the same minimum units/periods value.
Steps: Set Up Course Repeat Policies	**UPDATED** In the Context section: • Added student attempts when Workday applies and doesn't apply course repeat policies. • Added registration considerations for repeat attempts. In the Results section: • Added when Workday applies the effective as of course repeat policy. Included Next Steps section.

Steps: Evaluate and Manage Transfer Credits	UPDATED In the Initiate Transfer Credit Evaluation row on Step 1, added information about the Transfer Credit Troubleshooting button.
Create Transcript Configuration Rule Sets	UPDATED Updated the table in Step 2 to include layout changes and additional fields.

February 21, 2025

Financial Aid

Steps: Set Up Integration to Export ISIR Corrections	UPDATED Added Step 2 for configuring a new integration system to export ISIR corrections for the 2025-2026 award year.
Setup Considerations: Financial Aid Packaging	NEW Information to consider before setting up financial aid packaging.
Assign Financial Aid Packages	UPDATED Clarified that these options only apply for need packaging strategies: • **ISIR Review Status** • **Federal Verification Status** • **Total Income Minimum** • **Total Income Maximum**
Setup Considerations: Work-Study	NEW Information to consider before setting up Work-Study in Workday.
Steps: Set Up Work-Study	UPDATED Expanded the Context section to provide information about the factors involved with the type and amount of work-study award a student receives.
FAQ: Work-Study	UPDATED Moved FAQ about pay groups from this topic to the new Setup Considerations: Work-Study topic.

Steps: Set Up Student Disbursements	UPDATED Updated student sponsor contract information in Step 5.
Correct a Transmitted Alternative Loan Application	NEW How to correct a transmitted alternative loan application.

Student Financials

Set Up Financial Information Display Options	UPDATED Added link to the Disburse Student Sponsor Contract Payments topic.
Disburse Student Sponsor Contract Payments	UPDATED Added info about nightly orchestration.

February 7, 2025

Student Data

Steps: Set Up Student Athletics	UPDATED Moved Step 10 info about creating an eligibility status to the Steps: Create Athletic Teams and Eligibility Rules topic.
Steps: Create Athletic Roles and Statuses	UPDATED Corrected the workflow in the Next Steps section.
Steps: Create Athletic Teams and Eligibility Rules	UPDATED • Added info about creating an eligibility status from the Steps: Set Up Student Athletics topic. • Added workflow with the Next Steps section.

Student Financials

Steps: Create Student Registration-Based Fees	UPDATED In Context section and Step 3, rewrote for clarity.

January 24, 2025

Financial Aid

Setup Considerations: Actual Enrollment Usage Start Date	NEW Created new topic.
Concept: Actual Enrollment Usage Start Date	NEW Created new topic.
Reference: Disbursement Eligibility Conditions	UPDATED Added the Troubleshooting column.
Troubleshooting: Award Disbursement	UPDATED Created new topic.

Student Data

Steps: Create Athletic Roles and Statuses	UPDATED • Renamed this topic from "Steps: Create and Maintain Athletic Roles, Statuses, and Teams." • Updated the intro section to align with updated workflow for the Student Athletics section. • Removed Step 1 about creating an athletic team.
Steps: Create Athletic Teams and Eligibility Rules	UPDATED • Renamed this topic from "Steps: Create Athletic Teams and Add Members." • Updated the intro section, adding relevant info from the original "Steps: Create and Maintain Athletic Roles, Statuses, and Teams" topic.
Add Students to Athletic Teams	UPDATED • Updated the intro section, adding relevant info from the original "Steps: Create and Maintain Athletic Roles, Statuses, and Teams topic." • Moved the topic down to appear as the last topic.

Student Records

Set Up Security for Registration Restrictions	UPDATED

	For clarity: • Renamed topic from Set Up Overrides for Registration Restrictions to Set Up Security for Registration Restrictions. • Moved information from Step 1 to Steps 2, 3, 4 and 5. • Moved information from the Results section to Context.
Steps: Manage Continuing Student Onboarding	UPDATED For clarity, added additional information on what to configure on the the *Mass Continuing Student Registration Onboarding Event* and *Continuing Student Registration Onboarding Event* business processes in the Student Records functional area.
Example: Configure Continuing Student Onboarding	UPDATED Added a Prerequisites section.

January 10, 2025

Financial Aid

Reference: Disbursement Eligibility Conditions	UPDATED Updated the Transfer Monitoring row per FRA feedback.

Student Financials

Reference: Student Payment Statuses	UPDATED Added Student Sponsor information to Canceled and In Progress statuses.

Student Records

Steps: Manage Course Section Waitlists	UPDATED Expanded on the Steps section to include additional information and security for each task.
Reference: Drop Students from Courses	UPDATED Provides additional information about how to drop students from courses. Moved content from the Steps: Drop Students from Courses topic to this topic.

December 13, 2024

Academic Advising

Reference: Eligibility Rules for Academic Requirements	UPDATED Updated the topic title from Concept: Academic Requirements to a more meaningful title. Changed the topic type to a reference topic from a concept topic. Added: • Clarifying information in the introductory section regarding the usage of eligibility rules. • An example for the Accomplishment eligibility rule. • An example for the Activity eligibility rule and clarified the display of a completed activity. • Clarifying information for the Combination eligibility rule and an example of a combination rule. • An example for the Competency-Learning Outcome eligibility rule and links to Related Information. • Clarifying information and an example of the Unit Requirement eligibility rule. Corrected the: • Qualifier information for the Course Requirement eligibility rule. • Description for the Program of Study eligibility rule. • Qualifier information for the Unit Requirement eligibility rule.
Steps: Set Up and Assign Advisors	UPDATED Added links to related information in the Prerequisites section. Clarified the second bullet in the Next Steps section.

Campus Engagement

Send Ad Hoc Engagement Items	UPDATED In the prerequisites section, clarifying that push notifications are only available for matriculated students.
Troubleshooting: Unsent Engagement Items	UPDATED Added a new row to the first table describing how to troubleshoot engagement items when you haven't configured your notifications to deliver immediately.

Financial Aid

Reference: Financial Aid Reaction Reasons	UPDATED In the Other section, removed Course Section Delivery Mode Change and Residency Reason reactions from the table.
Increase PLUS Loan Amounts	NEW Created the Increase PLUS Loan Amounts topic.
Concept: PLUS Loans	UPDATED Updated and renamed the Increases and Adjustments section to "Loan Amount Changes."
Steps: Return Title IV Funds	UPDATED Added information about creating notifications for Return of Title IV worksheets.
Set Up Return of Title IV Worksheets	UPDATED • Moved prerequisites to the Steps: Return Title IV Funds topic. • On step 6, added information about reporting post-withdrawal disbursements to Common Origination and Disbursement (COD).

Student Records

Steps: Set Up Class Standing Policies	UPDATED Expanded and clarified the Context section to include information about class standing for Financial Aid. Moved security information from Steps 1 and 3 to the Prerequisites section. Moved content to Steps: Manage Class Standing for Students about: • Using the Mass Refresh Academic Statistics report, from the Steps section. • Where Workday displays class standing for students, from the Result section. • Overriding Workday-calculated class standing for students, from the Next Steps section. In the Next Steps section, added information about using class standing in eligibility rules.
Steps: Manage Class Standing for Students	NEW

	How to manage class standing for students. Moved content from Steps: Set Up Class Standing Policies to this topic.
Manage Programs of Study for Students	UPDATED Changed task names for **Add Program of Study Event** and **Remove Program of Study Event** to **Add Program of Study for Student** and **Remove Program of Study for Student**.
Reference: Grade Category Types	UPDATED Added: • Information about reporting grade category types in the introduction. • Rows for Missing Grade and Transfer Credit in the table. Clarified and expanded the descriptions for grade category types in the table.
Discontinue Academic Records	NEW Added new topic for discontinuing academic records.

November 15, 2024

Academic Advising

Create Restricted Requirement Groups	UPDATED Updated: • The **Prerequisites** section by adding inline links. • Revised the **Context** section for clarity. • Revised **Select One** and **Preference** in Step 2. • The **Example** section for clarity.
Concept: Restricted Requirement Groups	UPDATED Clarified the **Context** section to clarity the behavior of the sharing and nonsharing options on the **Maintain Academic Progress Processing Policy** task.
Set Up Academic Progress Processing Policies	UPDATED Updated the: • Row **Restrict Registrations to One Academic Requirement** with information about restricted requirement groups and added a topic link.

	• Row **Share Repeatable Courses in Restricted Requirement Groups that Prevent Sharing** with the new check box name **Share Repeatable Courses Between Academic Requirements**. Clarified the information about the check box. • Example section. • Steps by adding a new Step 4 with the information that used to be in the **Next Steps** section. Removed the **Next Steps** section.
Concept: Course Evaluations for Academic Progress	UPDATED In the **Restricted Requirement Groups and Preferences** section, updated the Repeatable courses in RRGs row with the new check box name and clarified the description.

Financial Aid

Reference: Financial Aid Effective Dates	UPDATED Updated the COD Routing ID Policy row.
Concept: Financial Aid Attendance Plans	UPDATED In the Refreshing Financial Aid Attendance Plans section, added a table containing student deactivatable statuses and descriptions.
Package Financial Aid Manually	UPDATED In Step 3, added information about reporting results displaying the student's original program of study.
Set Up Return of Title IV Worksheets	UPDATED Converted Steps 1–3 to prerequisites.

Student Records

Steps: Set Up Student Registration	UPDATED Expanded on the Context to provide more information on why to set up student registration.
Steps: Manage Student Registrations	UPDATED Added information about continuing student onboarding to the Prerequisites section. Expanded on the Context section for clarity.

Concept: Student Registration	UPDATED Expanded on the introduction to explain the purpose of setting up student registrations. Added information about continuing student onboarding to the Students Registering for Courses section.

November 1, 2024

Academic Foundation

Setup Considerations: Academic Calendars	UPDATED Updated the Academic Periods row with more details about weeks of instruction.

Financial Aid

Setup Considerations: Financial Aid Processing for Modules	UPDATED Updated the weeks of instruction bullet in the Limitations section with more information.
Reference: Financial Aid Impacts of Academic Period Date Changes	UPDATED Updated the Weeks of Instruction row with more details.
Refresh Financial Aid Attendance Plans	UPDATED Added a prerequisite about evaluating academic progress.
Reference: ISIR Transaction Statuses	UPDATED Updated the Active and Inactive rows to account for Grade Level Group.
Concept: Federal Direct Loan Reconciliation	UPDATED Added an introductory sentence.
Concept: PLUS Loans	UPDATED Added the Increases and Adjustments section.
Set Up Return of Title IV Worksheets	UPDATED Updated Steps 1-3 for non-instructional days.

Concept: Return of Title IV Funds (R2T4)	UPDATED Added the R2T4 Calculation section.
Concept: Official and Unofficial Withdrawals	UPDATED Updated the wording in the example.
Maintain Satisfactory Academic Progress Policies	UPDATED • Updated the Context section to provide more information about how Workday uses your configurations on the Maintain Satisfactory Academic Progress Policy task when evaluating SAP. • Added a new Step 2. • Added descriptions for the Include All Graded Registration and Exclude Grade Category Type options. • Added an example to illustrate how Workday uses your configurations on the Maintain Satisfactory Academic Progress Policy task to filter graded registrations. • Added the Next Steps section. • Moved the information from the Results section to the Next Steps.

Student Calculations

Example: Identify Undergraduates with GPA Greater Than or Equal to 3.0 (Logic Calculation)	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Example: Set Up Calculations for Applicant Scores	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Example: Create Aggregate Calculations for Cumulative GPAs	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Example: Create Value Comparison Calculations for Applicant Scores	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Example: Calculate State-Based Financial Aid Award Eligibility and Amounts (Top-Down Approach)	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented).

Example: Calculate Program of Study Award Amounts (Conditional Calculation)	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Example: Create a Lookup Table for Enterprise Award Rates Per Unit	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Example: Create a Lookup Table for Enterprise Award Percentages Based on GPA	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Example: Create Step-Based Conditions for Enterprise Award Amounts	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Example: Create a Step-Based Calculation for Enterprise Award Amounts	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Example: Calculate Student Tuition Charges (Bottom-Up Approach)	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Example: Calculate Overload Fees (Registration-Based Fees)	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Example: Calculate Overload Fees (Student Charge Item Assignments)	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Example: Calculate Per Unit Tuition (Arithmetic Calculation)	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Example: Calculate Flat Rate Tuition (Lookup Tables)	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented).

Example: Create Step-Based Conditions for Registered Units	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented)
Example: Create Step-Based Conditions for Campus Location and Standing	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented).
Example: Create a Step-Based Calculation for Recreation Center Fees	UPDATED Updated domain name from Calculation Segmented Setup to Access Calculation (Segmented).

Student Data

Steps: Set Up Access to Student Documents	UPDATED Renamed all instances of the Document Categories Segmented Setup domain to Set Up: Document Category Security Segments.

Student Financials

Set Up Financial Information Display Options	UPDATED In Step 2, added information on displaying the Allow Account Refresh Button.
Reference: Account Posting Rules for Student Transactions	UPDATED In the opening section, added a note about the Student Unbilled Receivables account posting rule not being in use. In the Student Payment Transactions section, added a line for Returns.

October 18, 2024

Financial Aid

Concept: Financial Aid Yearly Configuration Checklist	NEW Yearly configuration checklist to assist with preparing for subsequent financial aid award years.
Concept: NSLDS Data in Packaging	UPDATED

	Describes the concept of National Student Loan Data System (NSLDS) data in packaging.
Setup Considerations: Alternative Loan Processing	UPDATED Under Limitations, updated that you can certify alternative loan applications with either U.S. or international addresses.

Recruiting and Admissions

FAQ: Student Sites	UPDATED Clarified how to change email addresses for external student site accounts.

Student Data

Reference: Student Hubs Security	UPDATED For accuracy, renamed these Titles to Current Classes in the Academics Hubs section: • Current Courses. • Current Schedule.

Student Financials

Steps: Manage Student Sponsor Contracts	UPDATED Updated security information.
Disburse Student Sponsor Contract Payments	UPDATED In the context section, added information on conditions in which Workday will either not disburse funds, or will only disburse amounts paid by sponsors.
Disburse Student Sponsor Contract Payments	UPDATED Updated security information.
Sync Invoices and Contract Lines	UPDATED Updated security information.
Steps: Refund Student Sponsor Overpayments	UPDATED Updated security information.
Cancel Student Sponsor Refunds	UPDATED

	Updated security information.
Troubleshooting: Student Sponsor Contracts	UPDATED Updated security information.

Student Records

Steps: Set Up Waitlist Policies	UPDATED Expanded on Step 3 to provide information about multiple Cancel Expired Registration Waitlist Availability Events mass operations.
Concept: Waitlists	UPDATED For accuracy, added information about: • The types of waitlist management to the Context section. • How expired waitlist notifications are handled in the Waitlist Promotion section.

October 4, 2024

Academic Advising

Example Steps: Configure Academic Requirements Using Grade Averages for Minimum Courses	UPDATED For clarity, made minor updates to Steps 2 and 3 and the Result section.
Example: Create Accomplishments to Satisfy Academic Requirements	UPDATED Reordered steps for clarity. Split Step 7 into a new Step 8, and added the current Steps 8, 9, and 10 as substeps of the new Step 8.

Academic Foundation

Create Student Eligibility Rules	UPDATED Updated the Next Steps section by clarifying the different actions available after creating eligibility rules, specifically inactivating and deleting.

Campus Engagement

Reference: Workday-Delivered Student Hold Reasons	UPDATED

	Added information about the Packaging Error hold reason.

Financial Aid

Maintain Federal Student Aid Program Policies	UPDATED In Step 2 on the Pell Formula row, clarified that Workday doesn't support packaging Pell Grants using Formula 2, 3, or 5.
Refresh Financial Aid Data	UPDATED In Step 2 for Refresh Non-Instructional Days for Weeks of Instruction, renamed report Run Student Financial Processes by Student to Run Student Financial Services Processes by Student.
Reference: Student Nightly Job Orchestration	UPDATED • Added a note to the Recalculate Student Payment Plan Installments row that Workday doesn't recalculate Third Party Payment Plans. • Added a new row with the SFPR job.
Refresh Financial Aid Attendance Plans	UPDATED On Next Steps, removed charge assessments because they aren't included in the Run Student Financial Aid Processes by Period.
Assign Financial Aid Action Items	UPDATED Consolidated the the Ad-Hoc Non-ISIR and Non-ISIR Ad-Hoc descriptions.
Create Student Award Items	UPDATED Updated the Package Additional Unsub for Parent PLUS Denials row with a reference link.
Concept: PLUS Loans	UPDATED Added a note about denied Parent PLUS loan applications.
Troubleshooting: Loan Packaging	UPDATED Added loan application section information to the last Parent PLUS row.
Concept: Satisfactory Academic Progress	UPDATED

	Added a new Program of Study Changes section that describes what happens when students change programs of study.

Student Calculations

Example: Create Value Comparison Calculations for Applicant Scores	UPDATED • Updated domain name Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic. • Added Calculation Segmented Setup domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave.
Example: Calculate State-Based Financial Aid Award Eligibility and Amounts (Top-Down Approach)	UPDATED Added Calculation Segmented Setup domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave.
Example: Calculate Flat Rate Tuition (Lookup Tables)	UPDATED • Added Calculation Segmented Setup domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave. • Renamed domain from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic.

September 20, 2024

Academic Advising

Concept: Academic Plans	UPDATED Clarified that plan periods sent for approval are determined by the Enrollment Window End date even if the entire plan is selected for approval.
Steps: Set Up and Assign Advisors	UPDATED In Step 2, added that Student Workers and Academic Affiliates can't assign themselves as Advisors in Workday.

Academic Foundation

Create Academic Units	UPDATED

	In the Next Steps section, added information about refreshing your configurations when updating an existing academic structure with a new academic unit.
Create Programs of Study	UPDATED In Step 6: • Added information about fields related to educational credentials. • Moved the description of the Requires Declaration field to match the UI.
Reference: Date Controls	UPDATED In the Student Records Date Controls section, added: • A row for the Final Grade Publication date control. • Related Information links to Steps: Set Up Program Completion for the Conferral Date and Program Completion Application Deadline date controls.

Campus Engagement

Send Ad Hoc Engagement Items	UPDATED • In the prerequisites section, added information about how to set up Workday Messaging. • In Step 2, added a Compose SMS row.
Send Group Ad Hoc Communications	UPDATED Updated the name of the report from Run Student Financial Processes by Period to Run Student Financial Aid Processes by Period.
Create Student Messages	UPDATED • In the prerequisites section, added information about setting up Workday Messaging. • In Step 2, added a Contact Methods row.
Concept: Student Holds	UPDATED Added a sentence to the introduction about financial aid not disbursing.
Reference: Workday-Delivered Student Hold Types	UPDATED Added clarity and expanded on the Merit Packaging and Need Packaging descriptions.

Reference: Engagement Categories and Usages	UPDATED Added information about the: • Return of Title IV Worksheet data source and business object in the Plans and Ad Hoc row of the Financial Aid section of the table. • Student Financials Period Records data source in the Plans and Ad Hoc row of the Student Financials section of the table. • Student Financials Period Record business object in the Plans and Ad Hoc row of the Student Financials section of the table.

Financial Aid

Setup Considerations: Continued Financial Aid Processing	UPDATED Renamed the report Run Student Financial Processes by Period to Run Student Financial Aid Processes by Period in 2 instances.

Refresh Financial Aid Data	UPDATED
	
	• Added information to the Context section about refreshing your configurations when you change the academic structure by adding an academic unit.
	• In Step 2:
	  • Added a row for the new Refresh ISIR and NSLDS Transactions option.
	  • Renamed Run Student Financials Processes by Period report to Run Student Financial Aid Processes by Period.
	  • Renamed Run Student Financial Processes by Student report to Run Student Financial Services Processes by Student.

Concept: Job Schedules	UPDATED Renamed the report from Run Student Financials Processes by Period to Run Student Financial Aid Processes by Period in all instances.
Reference: Financial Aid Reaction Reasons	UPDATED • In the Attendance Plan section, added a new row for the Packaging Period reaction reason. • In the Other section, expanded the Waiver row.
Refresh Financial Aid Attendance Plans	UPDATED

	• Renamed Student Financial Processes by Applicant report to Run Student Financial Aid Processes by Applicant. • Renamed Run Student Financial Processes by Student report to Run Student Financial Services Processes by Student. • On Next Steps, renamed Run Student Financials Processes by Period report to Run Student Financial Aid Processes by Period.
Review Programs of Study for Load Statuses	UPDATED • Added a Prerequisite to verify the Load Status hold for programs of study. • Updated the information in the Context section stating the while enabled, Workday places a Load Status hold on the student.
Manage the Load Status Hold Configuration for Programs of Study	NEW How to disable or enable the Load Status hold configuration for programs of study.
View Reaction Flags for an Individual Student	NEW How to view reaction flags on an individual student's financial aid period record.
Concept: Financial Aid Attendance Plans	UPDATED • Renamed the report from Run Student Financial Processes by Applicant to Run Student Financial Aid Processes by Applicant. • Renamed the report from Run Student Financial Processes by Student to Run Student Financial Services Processes by Student.
Concept: Financial Aid Record Snapshots and POS Load Statuses	UPDATED Added information about disabling the Load Status hold for programs of study and a link to a new topic for managing the load status hold configuration.
Concept: Financial Aid Class Standings	UPDATED Added information about how the Final Grade Publication date affects class standing calculations.
Correct ISIR Transactions	UPDATED Added the ED note and the Grade Level Group row to Step 3.
Concept: Loading ISIRs	UPDATED

	Added the ISIR Classification by Grade Level Group section and Match and Merge info for Grade Level Group.
Create Financial Aid Action Items	UPDATED In Step 2, added information to the Autocomplete Criteria description about the MPN Status Code for the Direct Loan PLUS Master Promissory Note.
Assign Financial Aid Action Items	UPDATED Added Step 3 for the Grade Level Group field.
Assign Financial Aid Action Items	UPDATED Updated the Ad-Hoc Non-ISIR row for MI tenants.
Steps: Mass Assign Financial Aid Action Items	UPDATED Added the Grade Level Group row to Step 5.
Evaluate ISIR Action Items	UPDATED Renamed Run Student Financial Processes by Period report to Run Student Financial Aid Processes by Period.
Concept: Processing Financial Aid Action Items	UPDATED Added info about the Evaluate Financial Aid Action Items report filters.
Create Student Cost Items	UPDATED In Step 2, added a row for the Name field listing the student self-service tasks where the new cost item name appears.
Assign Cost of Attendance Manually	UPDATED In Step 1, renamed the report from Run Student Financial Processes by Period to Run Student Financial Aid Processes by Period.
Create Student Award Items	UPDATED Added more info to the Package Provisionally description.
Package Financial Aid Manually	UPDATED Renamed the report from Run Student Financials Processes by Period to Run Student Financial Aid Processes by Period.

Resolve Packaging Reactions	UPDATED • Updated name of Run Student Financial Processes by Period report to Run Student Financial Aid Processes by Period. • Added a new Step 4 to click the new Reaction Options. • Added a new Step 5 to display the updated options for resolving packaging reactions.
Maintain Pell Grant Limits for Student Awards	NEW How to set up and maintain maximum and minimum Pell Grant amounts starting with award years 2025-2026 and later.
Steps: Mass Cancel Student Awards	NEW How to cancel student awards in bulk.
Concept: Packaging Financial Aid	UPDATED • Added a Packaging Periods section. • Added a Viewing Packaging Job Runs section. • Expanded the What Award Packaging Does section to include information on packaging when a student transitions from an undergraduate to a graduate program during an award year. • Expanded the Repackaging section to include information on maximum and minimum Pell Grant amounts in packaging.
Concept: Viewing Financial Aid Packages	UPDATED In the Total Financial Assistance section, updated the Reaction Options row with information about: • Resolving any pending upstream reactions before running the task. • Setting the Reaction Method to Review on packaging reaction policies for manual reviews.
Disburse Student Award Payments	UPDATED Renamed the report Run Student Financial Processes by Period to Run Student Financial Aid Processes by Period.
Reference: Disbursement Eligibility Conditions	UPDATED Added information to the description of the PLUS Loan Requirements condition about two parent borrowers on parent PLUS loans.
Steps: Return Title IV Funds	UPDATED

	In Next Steps, renamed Run Student Financial Processes by Period report to Run Student Financial Aid Processes by Period.
Set Up Return of Title IV Worksheets	UPDATED Expanded Results section to mention worksheet approvals.
Evaluate Satisfactory Academic Progress	NEW How to evaluate satisfactory academic progress.
Update SAP Measure Details	UPDATED In Step 2, updated the Financial Aid Satisfactory Academic Progress Status (Overridden) field to Financial Aid SAP Status (Overridden).
Concept: Satisfactory Academic Progress	UPDATED Made these changes: • In the SAP Evaluation section, moved information about calculating SAP to the new Evaluate Satisfactory Academic Progress topic. • In the View Student SAP History section, added a reference to the new SAP History report.
Create Financial Aid Communication Rule Sets	UPDATED In Step 4, added information about communication exclusion options.

Recruiting and Admissions

Add External Transcripts	UPDATED Moved information about attendances to Concept: Educational Institution Attendances. On Step 4, • Added the Official row. • Added information about transfer credit evaluations on the Issued Date row. On Step 7, • Added Academic Area and Course Designations to the Course Title row. • Clarified and expanded information about transfer credit evaluations on the Course Units Earned, Course Unit Type, Course Units Attempted, and Grade rows.

Steps: Set Up Education Test Results	UPDATED Reordered Steps 5 and 6. Clarified information about machine learning recommendations for education tests when adding test results: • Moved information about where Workday displays the prompt recommendations from the Result section to the Context section. • In the Context section, added that Workday displays the recommendations by default. • Changed Step 6 to describe how to disable the prompt recommendations. • On Step 6b, changed the Test Results section to Admissions.
Add Education Test Results	UPDATED On Step 3, added the Test and Official rows. In the Next Steps section, clarified that you can't edit education test section results used for transfer credits and preliminary transfer credits.
Concept: Educational Institution Attendances	NEW Describes the concept of educational institution attendances in Workday.
Setup Considerations: Preliminary Transfer Credit	UPDATED In the Security section, renamed the Manage: Transfer Credit Rules domain to Set Up: Transfer Credit Rules. In the Reporting section, added information about the Preliminary Transfer Credit Troubleshooting Console report.
Steps: Set Up and Assign Preliminary Transfer Credit	UPDATED In Step 4, added a row for the Manage: Preliminary Transfer Credit domain. Added Step 5 for activating pending security policy changes. In the Next Steps section, added information about the Preliminary Transfer Credit Troubleshooting Console report.

Student Calculations

Concept: Student Calculations	UPDATED

	Added a list of the calculation categories that we provide for Workday Student.
Example: Identify Undergraduates with GPA Greater Than or Equal to 3.0 (Logic Calculation)	**UPDATED** • Updated domain name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic. • Added Calculation Segmented Setup domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave.
Example: Set Up Calculations for Applicant Scores	**UPDATED** • Updated name of the domain Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic. • Added Calculation Segmented Setup domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave.
Example: Create Aggregate Calculations for Cumulative GPAs	**UPDATED** • Updated domain name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic. • Added Calculation Segmented Setup domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave.
Example: Calculate State-Based Financial Aid Award Eligibility and Amounts (Top-Down Approach)	**UPDATED** Updated domain name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic.
Example: Calculate Program of Study Award Amounts (Conditional Calculation)	**UPDATED** • Updated the domain name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic. • Added Calculation Segmented Setup domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave.
Example: Test Amount Interim Calculations	**UPDATED** On Step 6, renamed Run Student Financial Processes by Period report to Run Student Financial Aid Processes by Period.
Example: Create a Lookup Table for Enterprise Award Rates Per Unit	**UPDATED** • Updated domain name Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic.

	• Added Calculation Segmented Setup domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave.
Example: Create a Lookup Table for Enterprise Award Percentages Based on GPA	UPDATED • Updated domain name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic. • Added Calculation Segmented Setup domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave.
Example: Create a Step-Based Calculation for Enterprise Award Amounts	UPDATED • Updated domain name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic. • Added Calculation Segmented Setup domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave.
Example: Calculate Student Tuition Charges (Bottom-Up Approach)	UPDATED • Updated domain name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic. • Added Calculation Segmented Setup domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave. • Updated Category in calculations from Student to Student Financials.
Example: Calculate Overload Fees (Registration-Based Fees)	UPDATED • Updated domain name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic. • Added Calculation Segmented Setup domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave. • Updated the category for calculations from Student to Student Financials.
Example: Calculate Overload Fees (Student Charge Item Assignments)	UPDATED • Updated domain name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic. • Added Calculation Segmented Setup domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave. • Updated category in calculations from Student to Student Financials.
Example: Calculate Per Unit Tuition (Arithmetic Calculation)	UPDATED

	• Updated domain name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic. • Added Calculation Segmented Setup domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave. • Updated Category in calculations from Student to Student Financials.
Example: Calculate Flat Rate Tuition (Lookup Tables)	UPDATED • Updated domain name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic. • Added Calculation Segmented domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave. • Updated Category in calculations from Student to Student Financials.
Example: Create Step-Based Conditions for Registered Units	UPDATED • Updated domain name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic. • Added Calculation Segmented Setup domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave. • Updated category in calculations from Student to Student Financials.
Example: Create Step-Based Conditions for Campus Location and Standing	UPDATED • Renamed domain name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic. • Added Calculation Segmented Setup domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave. • In Step 2, updated the category from Student to Student Financials.
Example: Create a Step-Based Calculation for Recreation Center Fees	UPDATED • Updated domain name from Set Up: Payroll (Calculations - Generic) to Set Up: Calculations - Generic. • Added Calculation Segmented Setup domain in the functional areas for Core Payroll, Implementation, Payroll Interface, and Time Off and Leave. • Updated category in calculations from Student to Student Financials.

Student Data

Reference: Home Page Cards for Workday Student	UPDATED

	For accuracy and clarity: • Renamed the Registration Appointment is Approaching card to Registration Appointment Starting Soon. • Added new information on when and how the Registration Appointment Starting Soon and Registration Appointment is Open cards display.

Student Financials

Setup Considerations: Accounting and Worktags for Student Financials	UPDATED In the Tenant Setup section, removed the requirement to define Companies for Auxiliary Financial Transactions as you must now associate an Institution to a Company.
Set Up Financial Information Display Options	UPDATED In Step 2, Added the Allow Account Refresh Button and Display Refresh Button During Peak Registration check boxes and description to the grid.
Setup Considerations: Student Charges	UPDATED In Connections and Touchpoints, removed references to Financial Aid Period Records.
Setup Considerations: Student Charges	UPDATED In the Business Processes section, renamed the report Run Student Financial Processes by Period to Run Student Financials Processes by Period.
Create Charge Assessment Schedules	UPDATED In the Results section, renamed student charge reaction to student financials reaction.
Post Student Charges Manually	UPDATED Updated the name of the report from Run Student Financial Processes by Period to Run Student Financial Aid Processes by Period.
Troubleshooting: Student Charges	UPDATED Removed references to Financial Aid Attendance Plans.
Example: Report on Student Charges Overdue by Over 720 Days	NEW

	Created a new example topic to illustrate how to edit the aging groups in the Student Receivables Aging Summary report to see student charges that are more than 720 days overdue.
Set Up Online Payment Options for Students	UPDATED Added a new Step 6, for the Hide Payment Fields on Make a Payment Fields for External Processor check box on the Student Payment Settings tab.
Steps: Set Up Student Payment Plans	UPDATED In the Step 8, added a note that Workday only recalculates internal payment plans.
Create Student Payment Plan Recalculation Schedules	UPDATED In the Context section, added a note that Workday only recalculates internal payment plans.
Manually Recalculate Student Payment Plan Installments	UPDATED In the Context section, added a Note that Workday only recalculates internal payment plans.
Concept: Student Payment Plans	UPDATED We add new sections for Mass Cancel Student Payment Plans and External Payment Plans.
FAQ: Why didn't a payment plan installment recalculate?	UPDATED Added information that Workday only recalculates internal payment plans.
Disburse Student Sponsor Contract Payments	UPDATED Updated the name of the report from Run Student Financial Processes by Period to Run Student Financial Aid Processes by Period.
Concept: Posting Student Waivers	UPDATED Added a sentence to clarify that you can now allocate waivers by amount or percentage to different funding accounts. Renamed the report from Run Student Financial Processes by Student to Run Student Financials Processes by Period.
Remove Past Due Balance Holds and Restore Registrations	UPDATED

	Renamed the report from Run Student Financial Processes by Student to Run Student Financial Services Processes by Student.

Student Records

Concept: Course Tags	UPDATED Moved information to new Set Up Course Tags and Set Up Course Tag Categories topics.
Steps: Set Up Student Registration	UPDATED Added a new Step 5 to describe how to enable saved schedules in dashboards for students.
Concept: Registration Drops and Swaps	UPDATED Added information about pending grades to the introduction for accuracy.
Concept: Student Registration	UPDATED Added information about the View My Saved Schedules report to the Registration Planning section.
Reference: Student Registration Errors	UPDATED For clarity, added: • A new row about errors related to pending grades in the Course Management section. • New examples for each item in the Description column.
Steps: Set Up Unit Conversion	UPDATED Clarified information about unit type conversion policies for transfer credit in the Context and Result sections. Added Step 4 about external unit type conversion policies for educational institutions.
Set Up Institutional Unit Type Conversion Policies	UPDATED Renamed from Set Up Institutional Unit Conversion Rules to Set Up Institutional Unit Type Conversion Policies. Expanded the Context section to include information about external unit type conversion policies for educational institutions. In the Result section, • Clarified that Workday uses the student unit type on the calendar policy.

	• Added that you can view institutional unit type conversion policies on the Academic Unit Policy Viewer report.
Steps: Set Up Transfer Credit Evaluation	**UPDATED** On Step 4, removed the Set Up: Transfer Credit domain. On Step 6, clarified that transfer grade mapping policies apply to education tests. On Step 9, changed the security domain from Manage: Student Transfer Credit to Set Up: Transfer Credit Rules. In the Result section, added security for the Find Transfer Credit Reasons report.
Set Up Transfer Grade Mapping Policies	**UPDATED** In the Result section, • Added that Workday uses the policy configured for the program of study or superior academic unit and level. • Clarified that you can view the policies on the Academic Unit Policy Viewer report. Removed the Next Steps section.
Set Up External Unit Type Conversion Policies	**UPDATED** In the Context section, clarified that Workday uses: • External unit type conversion policies in transfer credit evaluations. • Institutional unit type conversion policies when external unit type conversion policies don't apply. Removed the Next Steps section.
Create Transfer Credit Condition Rules	**UPDATED** In the Prerequisites section, renamed the domain from Manage: Transfer Credit Rules to Set Up: Transfer Credit Rules. Moved information about using the condition rule on transfer credit rules from the Result section to the Next Steps section. Removed the note about contextually secured condition rules.
Create Educational Institution Transfer Credit Rules	**UPDATED** Removed the prerequisite for setting up transfer credit evaluation. Added prerequisites for creating educational institution course catalogs and creating internal courses. Changed the security domains in the Prerequisites section: • Removed the Manage: Educational Institution and Manage: Student Transfer Credit domains.

	• Added the Set Up: Transfer Credit Rules domain. On Step 4, expanded and clarified information on these rows: • External Courses • Effective Date • No Internal Equivalent • Minimum Units
Create Education Test Transfer Credit Rules	UPDATED Removed the prerequisite for setting up transfer credit evaluation. Added prerequisites for creating education tests and creating internal courses. Changed the security domains in the Prerequisites section: • Removed the Manage: Student Transfer Credit domain. • Renamed the Manage: Transfer Credit Rules domain to Set Up: Transfer Credit Rules. On Step 4, expanded and clarified information on these rows: • Effective Date • No Internal Equivalent • Reasons • Minimum Score
Steps: Evaluate and Manage Transfer Credits	UPDATED Reorganized and revised the Steps section for clarity. Combined the steps for individual and mass transfer credit evaluations into Step 1. For the Initiate Transfer Credit Evaluation task on Step 1, added information about creating transfer credit rules from coursework that doesn't receive transfer credit. On Step 2, • Added an example to clarify when to use the Assign Student Transfer Credit task. • Added the Lock Credit row. In the Next Steps section, • Clarified that you can assign transfer credit manually for additional attempts of a course in a single transcript. • Added information about the Student Transfer Credit Troubleshooting Console report.
Concept: Transfer Credit	UPDATED Clarified and expanded information about: • The requirements and conditions for transfer credit evaluations. • How transfer credit rules are applied when multiple rules exist.

	• Additional considerations for transfer credit evaluations for external coursework and education test results. • Initiating a transfer credit evaluation of an external record that's already used to grant transfer credit.
Reference: Transfer Credit Evaluation Troubleshooting	NEW Provides additional information about transfer credit troubleshooting consoles.
Steps: Set Up Student Grading	UPDATED Added optional steps: • Step 6 for configuring date controls. • Step 8 for creating custom notifications for grade events.
Create Custom Notifications for Grade Events	NEW How to configure custom notifications for grade events.
Assign Student Grades	UPDATED In the Prerequisites section, removed the bullet about configuring final grading start and end date controls. Added information about the Final Grade Publication date control in the: • Last Date of Attendance row on Step 2. • Result section. Added the Next Steps section about manually publishing pending grades.
Change Student Grades	UPDATED In the Prerequisites section, added a bullet for setting up student grading. Added information about the Final Grade Publication date control in the: • Last Date of Attendance row on Step 2. • Result section. In Step 2, removed the Institution row.
Steps: Set Up and Manage Student Status Changes	UPDATED Renamed topic from Manage Student Leave of Absence, Institutional Withdrawal, Suspension, and Dismissal to Steps: Set Up and Manage Student Status Changes. In the Context section,

	• Moved information about editing the dismissal and suspension date of determination to the Next Steps section. • Added that you can't change the status when the student has registrations with pending grades. Reorganized information into the Steps section. Moved information about: • Setting up status change reasons from Prerequisites to Step 1. • Configuring date controls from Prerequisites to Step 2. • Creating questionnaires from the Result section to Step 3. In Step 4, • Clarified the steps for Leave of Absence, Institutional Withdrawal, Suspension, and Dismissal. • Moved information from the Context section about entering past withdrawal or leave start dates, and displaying active or inactive academic records. In the Result section, clarified information about whether Workday withdraws or drops registrations based on the date controls.
Reference: Student Statuses	UPDATED Moved information about the Complete status locking academic records from the overview to the Complete row.
Steps: Set Up Program Completion	NEW How to set up program completion.
Set Up Program Credential Policies	NEW How to set up program credential policies.
Set Up Program Completion Application Policies	NEW How to set up program completion application policies.
Apply Students for Program Completion	NEW How to apply students for program completion.
Change Expected Completion Dates	NEW How to change expected completion dates.
Manage Program Completion Applications	NEW How to manage program completion applications.

Confer Program Completions	NEW How to confer program completions.

Use Case Library

February 21, 2025

Use Case: Fulfilling a Report Request	UPDATED Provides a workflow in Workday when fulfilling a report request.
Use Case: Set Up On-Behalf Intercompany Transactions	UPDATED Provides an example of the roles and product areas in Workday when setting up On-behalf intercompany transactions.

September 20, 2024

Use Case: Award Cost Reimbursable Spend to Billing	NEW Describes the process flow of cost reimbursable spend to billing on an award.
Use Case: Build Variance Reports Using an Excel Report Template	NEW Provides a walk through of how to build a variance report using an Excel report template.
Use Case: Configure Academic Requirements and Policies	NEW Provides a walkthrough of how to configure academic requirements and policies.
Use Case: Create Invoices for Direct Intercompany Transactions	UPDATED Provides an example of the roles and product areas in Workday when creating invoices for direct intercompany transactions.
Use Case: Order to Cash Period Close	UPDATED

	Provides an example of the roles and product areas in Workday when performing the Order to Cash tasks during a period end close process.
Use Case: Procure to Pay Period Close	UPDATED Provides an example of the roles and product areas in Workday when performing the Procure to Pay tasks during a period end close process.
Use Case: Set Up Customers and Suppliers for Direct Intercompany Transactions	UPDATED Provides an example of the roles and product areas in Workday when setting up customers and suppliers for direct intercompany transactions.

Workday VNDLY

March 14, 2025

Calculation Engine

Steps: Calculation Engine	NEW How to configure calculation engine.
Create Custom Calculation Engine Formula Components	NEW How to set up custom components for calculation engine.
Create Calculation Engine Formula Groups	NEW How to create formula groups for calculation engine.
Create Calculation Engine Rules	UPDATED How to create rules for calculation engine.
Example: Create Pay Rate Based Formulas	NEW Illustrates how to create a pay rate based formula.

Statement of Work (SOW)

Concept: Editing Organization Units in Statement of Work	UPDATED

	This topic describes the concept of editing organization units on Statements of Work.
Create Change Order in Statement of Work	UPDATED This topic explains how to create change orders in Statements of Work.

Workday VNDLY Workforce Connector

Reference: Workday VNDLY Workforce Connector Business Process Security	UPDATED Added information about the Rescind (Web Service) permission to the Create Position and Close Position business processes.

Workflow Approvals

Reference: Workflow Approval Criteria	UPDATED Added Expenses & Adjustments to the Eligible Approval Types for the Geographic Location option.

February 21, 2025

Calculation Engine

Concept: Calculation Engine Formulas	NEW Describes the concept of Calculation Engine Formulas in Workday VNDLY.
Create Calculation Engine Formulas	NEW How to configure formulas to calculate billable amounts.

Workflow Approvals

Reference: Workflow Approval Criteria	UPDATED Added a Workday Custom Fields example for the Item has Custom Fields option.

February 7, 2025

Data Privacy

Bulk Export Users Before Purging	UPDATED New topic to support new functionality.

Expenses

Concept: Expenses	UPDATED Added new nav path.
Create Event-Based Expenses	UPDATED Added new nav path.
Example: Create a Scheduled Event-Based Expense	UPDATED Added new nav path.

Invoicing

Create Invoice Template Rules	UPDATED Added new nav path.
Void Invoices	UPDATED Added new nav path in context.
Concept: Invoicing Strategy for Fees	UPDATED Added new nav path.

Job Workflow and Settings

Create Job Templates	NEW How to create job templates.

Notifications

Edit Notifications	UPDATED

	How to edit notifications.
Concept: Notification Recipients in Settings	UPDATED Information about notification recipients.

Reporting

Manage Report Settings	UPDATED Added content for the Report Sharing section of the page.
Schedule Reports	UPDATED Added content for using the Run Now option to run the report on an ad-hoc basis.

Shifts

Steps: Set Up Shifts	UPDATED Added new nav path.
Enable Shift Selection for Job Templates	UPDATED Added new nav path
Create Shifts	UPDATED Added new nav path.
Create Shift Rules	UPDATED Added new nav path.
Bulk Update Shifts	UPDATED Added new nav path.

Sign In to Workday VNDLY

Set Up Multi-Factor Authentication in Workday VNDLY	UPDATED Revised the navigation information in the VNDLY Admin Guide to reflect the new grouping of settings on the Company Settings page.

Timesheets

Set Up Timekeeping Setting Defaults	UPDATED Added new nav path
Create Timekeeping Settings Rules	UPDATED Added new nav path.
Enable Overtime Allocation Enforcement on Timesheets in Settings	UPDATED Added new nav path
Create Overtime Rates and Profiles	UPDATED Added new nav path.

Users and Security Settings

Add Permissions to a User Role in Settings	UPDATED Add permissions to a user role.
Concept: User Type Permissions in Settings	UPDATED The types of user type permissions.

Workday VNDLY Workforce Connector

Steps: Send VNDLY Custom Fields to Workday	NEW How to set up the Workforce Connector to send VNDLY custom fields related to the worker to Workday.
Configure Custom Objects Settings	UPDATED How to send custom objects to Workday via the connector.

January 31, 2025

Notifications

Create Notification Groups in Settings	UPDATED Added new navigation path.

January 24, 2025

Sign In to Workday VNDLY

Change Sign-Up Token Expiration Period	NEW How to modify the length of time a sign-up token is valid for.
Concept: VNDLY Authentication Methods	NEW Describes the 2 authentication methods available in VNDLY.
Concept: Sign-Up Token Expiration	NEW Describes the concept of expiry of sign-up token invitations in VNDLY.

Users and Security Settings

Set Up Security Policies	NEW How to set up security policies in your tenant.

January 10, 2025

Sign In to Workday VNDLY

Reset Multi-Factor Authentication For Another User	NEW Information for an admin to reset a MFA token for a user

Statement of Work (SOW)

Set Up Statement of Work Settings	UPDATED Add Allocate SOW Budgets using charge codes changes. How to set up SOW.

Work Orders

Change Organizations on Work Orders for Workday-Integrated Tenants	NEW How to change the organization unit for Workday Tenants

Change Organizations on Work Orders for Non-Workday Integrated Tenants	NEW Topic on changing organizations on work orders.

December 13, 2024

Checklists

Set Up Checklist Settings	NEW New topic describing how to use the Configuration tab for checklist settings.

Notifications

Set Up Email Notifications	NEW Set up how users get email notifications. Added new navigation path.

Reporting

Manage Reports	UPDATED Added specific permissions.
Schedule Reports	UPDATED How to schedule a report in VNDLY using new Report Builder.

Users and Security Settings

Create Security Roles	UPDATED Added how to edit security roles in Workday VNDLY.

Workflow Approvals

Create Approver Types	UPDATED Added information on the SOW Manager From Top and Management Level Approver approver types.